



TOWN OF CARRBORO • NC

TOWN OF CARRBORO NORTH CAROLINA



**FY 2024-2025
ADOPTED BUDGET**

**TOWN OF CARRBORO
NORTH CAROLINA**

**ADOPTED BUDGET
FISCAL YEAR 2024-25**

TOWN COUNCIL

Barbara Foushee, Mayor
Danny Nowell, Mayor Pro-Tempore
Ranee Haven-O'Donnell
Eliazar Posada
Catherine Fray
Jason Merrill

TOWN MANAGER'S OFFICE

Patrice Toney, Town Manager
Marie Parker, Assistant Town Manager
Anita Jones-McNair, Chief Race and Equity Officer
Kannu Taylor, Race and Equity Manager
Reilly Stahl, Assistant to the Town Manager

TOWN CLERK

Lamar Joyner

FINANCE DEPARTMENT

Darrell Keyes, Comptroller/Interim Finance Director
Langston Ramseur, Deputy Finance Director
Wendy Welsh, Grants Manager
Edna Kirkman, Staff Accountant
Jane Bowden, Procurement Coordinator
Jordan Kerr, Payroll & Benefits Coordinator
Chandra Edwards, Accounting Technician/Receptionist

Table of Contents

Reader’s Guide	5
Town Manager’s Letter	7
Budget Message	9
Executive Summary	9
Section 1 – Community and Organizational Profile	16
About the Town of Carrboro	16
Key Intergovernmental Relationships	21
Governmental Structure	22
Town Council Priorities	24
Section 2 – General Fund	27
General Fund Revenue Descriptions	30
General Fund Balance as of June 30	35
Section 3 – General Government	37
Mayor and Town Council	37
Advisory Boards and Commissions	40
Town Manager	41
Economic Development	45
Climate Action	49
Communication & Engagement	55
Housing and Community Services	64
Town Clerk	70
Human Resources	74
Finance	78
Information Technology	83
Section 4 – Police	85
Section 5 – Fire and Rescue	92
Section 6 – Planning	98
Section 7 – Transportation	106
Section 8 – Public Works	110
Section 9 – Recreation, Parks, and Cultural Resources	118
Section 10 – NonDepartmental	125
Section 11 – Debt Service	126
Section 12 – Special Revenue Funds	127
Affordable Housing Fund	128
Grant Fund	129
Powell Bill Fund	130
American Rescue Plan Act (ARPA) Fund	131
Emergency Loan Fund	132
Energy Efficiency Revolving Loan Fund	133
Revolving Loan Fund	134
Section 13 – Capital Project Funds	135
Capital Projects Fund	135
GO Bond-Funded Sidewalks and Greenways Projects Fund	137

Facilities Rehab Projects Fund	138
Capital Reserve Fund	139
Payment-in-Lieu Reserve Fund	140
Section 14 – Enterprise Funds	141
Stormwater Utility Enterprise Fund	141
Parking Utility Enterprise Fund	148
Section 15 – Glossary	149
Glossary	149

Reader's Guide to the Budget Document

The Mayor and Town Council adopt a balanced annual operating budget ordinance for the Town as required by the North Carolina General Statutes (GS 159-13). The budget document describes the economic, financial, and environmental factors that translate community values into a dynamic web of services that contribute to the town's desired quality of living.

In addition to presenting the town's annual budget, the budget document includes the multi-year, special revenue funds, the capital budget, and financial trends and projections for general fund revenues and expenditures to present a complete picture of the Council's commitments. The purpose of presenting this holistic picture is to assist the Town Council, town staff, and the community in understanding the impact that current decisions have on future resources and to assist with development of strategies to address potential changes or problems.

The budget document is divided into the following sections.

- Budget Message** –This section includes the Executive Summary that describes the fiscal environment faced by the Town and identifies the expenditure and revenue budget actions to be considered by the elected governing council. This section also includes the Town's budget ordinance appropriating projected revenues and expenditures for various funds.
- Community and Organizational Profile** – This section of the budget document highlights the demographic, economic and cultural characteristics of the Carrboro community, and the goals of the community expressed by the elected Council. It also describes the Town's budget process, financial policies, and other pertinent information.
- General Fund** - This is the Town's operating fund. The General Fund is organized around functional areas and sub-divided by department or expenditure category that is authorized within the budget ordinance. The General Government section includes numerous departments that support the Town's operations and other departments. Larger departments show divisions based on distinctive service provided along with a description of the department's purpose, service activities, coming year work plan goals, objectives, and projects, table of authorized positions, performance measures and spending history and budget.
- Special Revenue Fund** – The Town currently maintains the following Special Revenue Funds: Revolving Loan Fund, Energy Efficiency Revolving Loan Fund, Emergency Loan Fund, Affordable Housing Fund, Powell Bill Fund, American Rescue Plan Act Fund, and Grants Fund.
- Capital Projects Fund** – This fund includes all active capital projects of the Capital Projects Fund, Bond Fund, Facilities Rehabilitation projects, Capital Reserve Fund, and the Payment-in-Lieu Fund.

- ☐ **Enterprise Funds** – These are business type funds that are intended to generate sufficient revenues to become self-supporting. The Town has two Enterprise Funds: 1) Stormwater Utility Enterprise Fund supported by user fees for stormwater management and flood remediation activities; and 2) Parking Enterprise Fund currently supported by the General Fund for parking management.

- ☐ **Glossary** – A list of common budgeting terms defined and explained.

Please direct comments or questions to:

Darrell Keyes
Comptroller/Interim Finance Director
Town of Carrboro
301 W. Main Street
Carrboro, NC 27510
Telephone: (919) 918-7301
Email: dkeyes@carrboronc.gov

Budget information is also available for viewing on the Internet at:
www.ci.carrboro.nc.us/250/Financial-Documents



June 18, 2024

Dear Mayor Foushee and Council Members:

I am pleased to present the fiscal year 2024-25 annual budget for the Town of Carrboro. The Town's annual operating budget represents Carrboro's mission and commitment to enhancing the quality of life of our residents. This budget reflects our dedication to supporting our valuable employees, investing in critical infrastructure, and meeting the immediate needs of our community. The proposed budget aims to include the Council's key priorities of affordable housing, race and equity, environmental protection, and will continue to integrate Carrboro Connects throughout the budgeting process.

The adopted budget for fiscal year 2024-25 totals \$68.3 million across all funds. In FY 2025, property and sales tax revenues constitute 80.6% of the total general fund revenues. The property tax rate for FY 2025 will remain the same at \$0.5894 per \$100 of valuation for the General Fund, with an additional \$0.0150 per \$100 of valuation allocated to the Affordable Housing Fund. The operating budget for the Town is \$32.6 million consisting of multiple revenue sources including property taxes, permits, and fees, which offsets expenditures such as personnel, operating, and debt service.

The Town of Carrboro is committed to acknowledging and compensating its employees for their hard work and dedication to public service through a comprehensive compensation and benefits package. To fulfill this commitment, the Council has identified employee investment and retention as the top priority for the upcoming fiscal year. In the adopted budget for FY 2025, there is a 10% across-the-board salary increase for existing staff. This increase consists of a 3% cost-of-living adjustment (compared to the 3.4% CPI for SE USA in December 2023) and a one-time 7% salary adjustment to align with the competitive environment in which the Town of Carrboro resides. Additionally, the FY 2025 adopted budget includes a 3.4% increase to starting salaries for pay ranges on open positions available within Carrboro while awaiting the results of the compensation study.

The American Rescue Plan Act (ARPA), which was signed into law on March 11, 2021, provides funding to state and local governments to help them address COVID-19 pandemic public health emergency response needs and build a stronger, more equitable economy as the country recovers. The Town has received \$6.75 million under this Act. As of now, the Town has invested over \$750,000 back into the community, contracted an additional \$2.9 million, and plans to spend an additional \$1.5 million by the end of 2024. This \$4.9 million spent represents over 75% of the federal ARPA funding. The Town will obligate and contract the remaining \$1.5 million in line with Council objectives in the Fall of 2024.

The Capital Projects Fund, totaling \$25.6 million, encompasses projects aimed at adding new infrastructure or renovating existing structures within the town. This amount reflects a significant

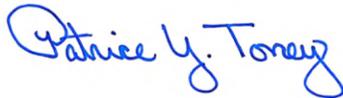
decrease from the FY 2024 budget, mainly due to the pending completion of the 203 Project. Other projects include the development of greenways, initial planning for renovating existing town buildings, and ongoing reinvestment in the town's fleet. The 203 project is expected to be completed in the first half of FY 2025. Additionally, the Capital Projects Fund allocates an additional \$650,000 specifically for replacing Fire Ladder 1, which has an anticipated 36-month production lead time before delivery.

The FY 2025 budget allocates resources to the Council's top priorities, such as the Carrboro Family Financial Assistance Program, Land Use Ordinance rewrite, and significant investment in affordable housing. We believe the Council's key priorities will strengthen our workforce, improve our town's stability, and enhance residents' quality of life.

On behalf of all Town of Carrboro employees, I want to thank the Mayor and Council Members for your leadership, vision and dedication to Carrboro's unique identity and quality of life. I would also like to thank the Finance Department staff for their leadership during the development of this budget. They have worked tirelessly to bring you a budget that reflects the values and needs of our ever-growing community.

We value the discussions that have shaped this budget, and we look forward to executing the budget objectives in FY 2025.

Sincerely,



Patrice Toney
Town Manager

EXECUTIVE SUMMARY

BUDGET OVERVIEW

The budgeting process involves numerous strategies including detailed analysis and review of historical data and trends, layering in of economic indicators, and financial best practices as it relates to forecasting. These strategies are implemented both in estimated Town's revenue potential as well as consideration of ongoing and additional expenses planned to be incurred in FY 2025. At this time of year, the Town has typically collected the first two quarters of various revenues that are distributed by the State quarterly. Much of the narrative on the following pages speaks to the trends related to the first two quarters of revenues distributed by the State to the Town.

According to the Bureau of Labor Statistics North Carolina's unemployment rate was 3.3% as of April 2024 as well as compared to 3.9% nationally. Similar figures for the same time last year were both 3.4%. The dominance of the professional services sector and proximity to the University of North Carolina and Research Triangle Park helps keep the unemployment levels lower in the Carrboro area.

North Carolina sales tax collections remained a strong point for revenues at both the state and local levels. As of April 2024, the town has collected 70% of its projected sales tax revenue, compared with 65% of projected sales tax revenue in April 2023. It should be noted that in June 2018, the United States Supreme Court ruled that states have the authority to require online retailers without a physical presence in the state to collect and remit sales taxes (*South Dakota v. Wayfair, Inc.*)

Through April, general fund revenue collections for FY 2024 total \$23.7M or 79.3% of the adopted budget. Property tax revenue collections to date are \$16.2M compared to \$15.6M this time last year. Local sales tax revenues total \$3.7M compared to \$3.5M at the same time last year.

A key factor related to collection of sales tax and intergovernmental revenues is the lag period between collection by the State and distribution to local governments. The North Carolina Department of Revenue distributes local sale tax revenues to localities three months after the month in which they are earned, and intergovernmental revenues three month after the end of the quarter.

The Town continues to maintain its conservative, but realistic approach in estimating revenues, while using available data and expense trends to accurately forecast variable expenses the Town is expected to incur in FY 2025. The Town assumes that the North Carolina General Assembly will take no actions during its 2024 session that would negatively impact the Town's existing revenue stream.

In Carrboro, the total number of permits decreased in FY Ended June 30, 2023 from the prior year, but the total value of the permits increased substantially, mainly in commercial permits, as shown below. Commercial permits increased substantially, with the total value increasing sharply from the prior year.

Ended June 30	Commercial		Residential		Multi-Family		Total	
	Number	Value	Number	Value	Number	Value	Number	Value
2020	121	\$ 2,287,336	549	\$ 21,063,564	124	\$ 647,314	794	\$23,998,214
2021	115	\$ 4,664,640	679	\$ 21,314,185	102	\$ 318,791	896	\$26,297,616
2022	179	\$ 5,672,679	550	\$ 26,160,957	459	\$ 3,811,158	1188	\$35,644,794
2023	141	\$ 32,215,891	662	\$ 29,802,823	183	\$ 974,383	986	\$62,993,097

TOTAL TOWN BUDGET

In developing the FY 2025 budget, some operating expenses were increased due to inflationary demands. The major goals in developing the FY 2025 budget were to:

- Implement the Town Council’s strategic priorities identified in February 2024.
- Investment in the retention current town staff and the recruitment of future team members.
- Development of a balanced budget.
- Manage costs while improving services to the residents.
- Conceptualize a long-term financial sustainability plan for the Town.

The total FY 2025 General Fund Adopted budget of \$32,685,651 is a 11.4% increase from the adopted budget of \$29,330,449 last year. When all other fund accounts are considered, the total FY 2025 Town budget of \$68,305,186 is as follows:

SUMMARY FY 2024-25

Fund	FY 2023-24	FY 2024-25	\$ Change	% Change
General Fund	\$29,330,449	\$32,685,650	\$3,355,201	11%
Capital Projects	\$41,465,910	\$25,551,937	(\$15,913,973)	-38%
Special Revenue	\$9,122,838	\$8,209,590	(\$913,248)	-10%
Total Governmental Funds	\$79,919,197	\$66,447,177	(\$13,472,020)	-17%
Storm Water Enterprise	\$1,062,746	\$1,642,008	\$579,262	55%
Parking Enterprise	\$141,000	\$216,000	\$75,000	53%
Total	\$81,122,943	\$68,305,185	(\$12,817,758)	-16%

BUDGET PROCESS

Departments are required to justify their operating budget for the continuation of services. The continuing budget includes adjustments for price increases in the cost of goods and services; and includes project and infrastructure expenditures reflected in the annual Capital Improvement Plan (CIP) which includes street resurfacing costs, replacement of vehicles and equipment, and debt service payments.

REVENUES

Carrboro’s revenue stream has two broad types of revenues: recurring revenues, and other financing sources which represent certain one-time inflows of revenue. Recurring revenues consist

of property taxes, local sales taxes, other taxes/licenses, and intergovernmental revenues, comprising 87% of the FY 2025 budget. The remaining 13% is a one-time appropriation from the General Fund Balance. This appropriation, detailed below, brings the Town of Carrboro closer to its stated range of 22.5-35% of Unassigned Fund Balance compared to Expenditures, largely driven but an increase in Unassigned Fund Balance in prior fiscal years due lower than anticipated expenditures.

For FY 2025, total recurring revenues are projected to increase by 11.4% over the FY 2024 Adopted Budget. The projection for the property tax revenue increase 6% over last year’s budget is due to steady increase in property taxes collected in FY 2023 and FY 2024. This projection is reinforced with FY 2024 YTD collections exceeding FY 2024 Adopted Budget by approximately 4%, with a conservative increase forecasted in FY 2025 above the projected FY 2024 current YE total.

Intergovernmental revenues, which comprise just under 5% of general fund revenues, are expected to remain steady from FY 2024.

Recurring Revenues – General Fund

	FY2023 Actual	FY 2024 Adopted	FY 2025 Projected
Revenues:	Per Audit		
Ad Valorem Taxes	\$ 15,777,404	\$ 15,800,200	\$ 16,745,978
Local Sales Taxes	7,076,695	6,116,000	6,268,900
Other Taxes/Licenses	1,864,150	1,726,261	1,864,150
Intergovernmental	2,242,368	1,510,298	1,600,000
Permit & Fees	1,126,296	1,312,811	1,312,810
Sales & Services	326,441	184,700	326,441
Other Revenues	663,692	276,120	450,000
Total Revenues	29,077,046	26,926,390	28,568,279
Fund Balance Appropriated		2,404,059	4,117,372
Total Revenues & Fund Balance Appropriation	\$ 29,077,046	\$ 29,330,449	\$ 32,685,651

Property and sales tax revenues make up 80.6% of total General Fund revenues in FY 2025, excluding Appropriated General Fund Balance other financing. The total property tax valuation is estimated to be \$2,825,679,285 based on valuation by the Orange County Tax Administrator. The total property tax valuation net of exemptions is estimated at \$2,590,186,580. The property tax rate will remain at \$0.5894 per \$100 of valuation for the General Fund, and \$0.0150 per \$100 of valuation for the Affordable Housing Fund. Each penny of the tax rate is projected to generate approximately \$275,000. Property tax relief is available for the elderly, permanently disabled persons, and veterans who meet income and other specific exemption requirements.

OTHER FINANCING

Other financing sources in the General Fund include inter-fund transfers, installment financing and fund balance appropriation. The Fund Balance Appropriation in the FY 2025 budget is \$4.1M, or 13% of the total General Fund adopted budget.

Fund Balance Appropriation, as stated above, is utilized to balance the anticipated expenses with expected revenues. The Fund Balance Appropriation in FY 2025 addresses multiple one-time expenses expected to be incurred by the Town, including a one-time adjustment to existing staff salaries of 7%, the re-write of the Land Use Ordinance, and other studies focused on both personnel and planning. Historically, the Town budgets Fund Balance Appropriation, but has seldom needed to use it for actual expenditures due to revenues exceeding expenditures.

FY 2024-25 GENERAL FUND REVENUE SOURCES

% of Total \$32,685,651

EXPENDITURES

For FY 2025, total General Fund operating expenses increased by 11% over FY 2024. Of the total budget, personnel costs account for 57%, while operating costs account for 42%, with the remaining 1% as a transfer from the General Fund to the Parking Fund.

	FY24	FY25	\$ Change	% Change
	Adopted	Adopted		
Personnel	\$17,648,334	\$18,668,311	\$1,019,977	6%
Operating	\$11,541,115	\$13,801,340	\$2,260,225	20%
Transfers	\$141,000	\$216,000	\$75,000	53%
Total	\$29,330,449	\$32,685,651	\$3,355,202	11%

PERSONNEL

General Fund personnel costs are expected to increase by 6% to account for all 175 Full-Time Positions. Funds to cover salary adjustments and benefit cost increases are budgeted in included in the FY 2025 budget.

Other factors affecting personnel costs include:

1. Projected 6.0% increase in health insurance premiums.
2. A 74-bps increase in the employer contribution rate to Local Government Employees Retirement System (LGERS).
3. Across the board pay increase of 10% to permanent employees.

FY 2024-25 LGERS

Contribution rates for the Local Government Employees' Retirement System (LGERS) will increase to 13.64% for general employees; to 15.04% for law enforcement officers in FY 2025. Below is the schedule of contribution rates through FY 2025.

LGERS Employer Contribution Rate		
	General	Law Enforcement
Fiscal Year	Employees	Officers
2020-21	10.20%	10.84%
2021-22	11.40%	12.04%
2022-23	12.10%	13.10%
2023-24	12.90%	14.10%
2024-25	13.64%	15.04%

OPERATING EXPENSES

General Fund operating expenses in FY 2025 will increase by 23% from \$10,640,825 to \$13,801,340. In addition to maintaining the existing service levels, funds are budgeted for Employee and Organizational Development activities (e.g., risk management/safety, supervisor training, etc.). The Town will continue with the implementation of its Race and Equity Action Plan (REAP) and budget for race and equity initiatives, training, and Government Alliance on Race and Equity (GARE) participation. The Town will also continue with the implementation of its Energy and Climate Protection Plan (ECPP) and the Community Climate Action Plan (CCAP). Particular attention will be given to new projects to incorporate energy savings strategies with the goal of reducing operating costs and greenhouse gas emissions.

SPECIAL REVENUE FUND

The Special Revenue Fund accounts for revenues and expenditures legally restricted or designated by the Town Council for specific program activities or services. Included in the Special Revenue Fund are the following:

1. American Rescue Plan Act
2. Grant Administration
3. Affordable Housing
4. Powell Bill
5. Revolving Loan Fund
6. Revolving Loans for Energy Efficiency
7. Emergency Loans

The total budget for the Special Revenue Fund in FY 2025 is \$8.2M.

SPECIAL REVENUE FUND SUMMARY

	Adopted	Adopted		
	Budget	Budget	\$	%
	FY2023-24	FY2024-25	Change	Change
American Rescue Plan Act	\$6,426,677	\$5,657,508	-769,169	-12.0%
Grant Administration	\$811,909	\$640,449	-171,460	-21.1%
Affordable Housing	\$593,923	\$604,930	11,007	1.9%
Powell Bill	\$545,812	\$562,186	16,374	3.0%
Revolving Loan Fund	\$407,690	\$407,690	0	0.0%
Revolving Loans for Energy Efficiency	\$205,227	\$205,227	0	0.0%
Emergency Loans	\$131,600	\$131,600	0	0.0%
Total	\$9,122,838	\$8,209,590	-913,248	-10.0%

For FY 2025, 1.5 cents of the property tax will continue be dedicated to the Affordable Housing Special Revenue Fund.

CAPITAL PROJECTS FUND

The Capital Projects Fund includes projects that are financed by the General Obligation Bonds, debt financing, and pay-go for the construction or acquisition of a capital assets. Capital projects (i.e., those costing more than \$100,000 or take more than one year to complete) are generally planned for in the Capital Improvements Plan (CIP). Capital projects are funded by the adoption of a Capital Project Ordinance by the Town Council that requires a balanced budget (i.e., expenses equal anticipated revenues) and is in effect until completion of the project.

Contingent upon fund balance ratios in the Town’s General Fund being within the stated policy goal of 22.5% to 35.0%, the Town Manager may assign an amount above 35% for future capital projects.

The total Capital Project Fund budget for FY 2025 is \$25.5 million. The largest project remains the development of the facility at 203 South Greensboro Street. This is a joint project by Orange County and the Town at an anticipated total cost of \$41.2 million. This project will house the Orange County Southern Branch Library, Orange County Skills Development Center, Town Recreation, Parks, and Cultural Resources administrative offices, and several other compatible uses. This fund also includes appropriations for the purchase of several replacement vehicles.

Budget Summary - CAPITAL PROJECT FUNDS				
	Adopted Budget FY 2023-24	Adopted Budget FY 2024-25	Amount Change	Pct Change
Fund:				
Capital Projects	35,907,914	20,451,378	(15,456,536)	-43%
GO Bonds, Sidewalks and Greenways	4,531,257	3,423,810	(1,107,447)	-24%
Facilities Rehab	458,597	458,597	-	0%
Capital Reserves	568,032	1,218,032	650,000	114%
Payment In Lieu	110	120	10	9%
Other			-	
Totals	\$41,465,910	\$25,551,937	(15,913,973)	-38%

Because capital projects can affect all categories of spending in the operating budget, it is important to have a systematic planning process to prioritize needs, as well as identify possible financing plan. The Town Manager is responsible for developing and maintaining a five-year Capital Improvement Plan (CIP) that includes long-term maintenance, infrastructure needs, and technology needed for the community. As part of the Town’s ECPP and CCAP, all capital projects are to be evaluated for energy savings and greenhouse gas emissions reductions. The CIP through FY 2027 can be reviewed on the Town’s web site at: www.ci.carrboro.nc.us/250/Financial-Documents

CONCLUSION

This budget was created with realization that that revenues will retain momentum observed coming out of the pandemic, but also developed conservatively. Budgeted Town revenues for FY 2025 are above last year’s figures, with Town expenditures increasing compared to FY 2024 to account for Council identified objectives and general inflation.

The Town has begun to implement its energy and climate protection plan with the goal of not only saving energy, but also reducing operating costs as well. All capital projects, including vehicles and equipment, will be considered for energy saving measures that will also lead to reduced operating costs. As in the past, all investments in capital equipment will be analyzed from a cost-benefit analysis and to fully gain maximum use of the asset possible.

Careful and balanced choices are presented in the FY 2025 budget that provide for continued delivery of quality services, carrying out Town Council priorities, maintaining financial strength, and retaining talented and productive employees.

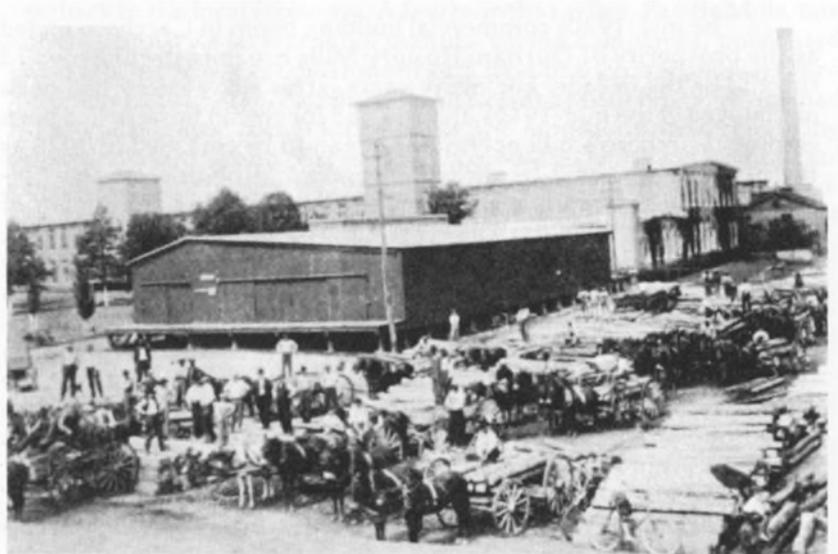
ABOUT THE TOWN OF CARRBORO

Carrboro's roots began in 1882 when a branch of the North Carolina Railroad extended south to the edge of Chapel Hill, and the first local textile mill opened nearby. Informally known as West End and Lloydville, in 1911, the community incorporated as a town named Venable, for chemistry professor and University of North Carolina president Francis Preston Venable.

Two years later, the state legislature renamed the town Carrboro at the request of Julian S. Carr, a post-Civil War business leader. He was also an active and influential participant in Jim Crow era efforts to create a system of racial segregation. Although the town continues to bear his name, the values and actions of Carr do not represent Carrboro today.

In the 1970s, a group of Carrboro residents joined together to change the town's power structure and advocate for a community that fully included all residents. Thanks to their commitment, today Carrboro honors its working-class roots while reaching toward the goals of social equity, environmental harmony, and fiscal responsibility. For the first fifty years after its incorporation, Carrboro remained a small mill town with a slow, steady pace of growth. In 1960, approximately 2,000 people lived in the town.

In the late 1960s, the town's population began to increase stemming from the growth occurring at UNC-Chapel Hill and growth in the Research Triangle Park. Enrollment at the University has increased slightly from 31,949 in 2023 to 32,234 in 2024.



Circa 1920 view of the cross tie market on East Main Street, in front of Durham Hosiery Mill No. 4. The frame cotton warehouse and the upper stories of the brick towers have been removed, and the east end of the mill has been extended with a brick addition. From copy in North Carolina Collection, UNC Library, Chapel Hill.

The Town of Carrboro is a small local government entity overseen by a Mayor and five Council Members, and professionally managed by a Town Manager under the Council-Manager form of government. The Town is located within Orange County in the north central portion of North Carolina. The area's topography is characterized by rolling hills. The Town is situated next to the Town of Chapel Hill home to the University of North Carolina and is near the Research Triangle Park.



The American Community Survey (ACS) provides detailed information on population, housing occupancy and ownership, educational attainment, employment, and travel. The ACS, a method of continuously collecting data on these characteristics by sampling three million households each year, has been underway since 2005. Aggregated estimates for the period 2016 to 2020 for smaller communities, including Carrboro, are used in this section. More frequent data collection is considered a viable method of providing more up-to-date information about the US population, particularly at the local community level.

POPULATION

Carrboro's population in 2020 was 21,295. Since the last census in 2010, the population has grown by 1,713, or 8.7%. These residents constitute approximately 14.3 percent of the Orange County population of 148,696.

ETHNIC COMPOSITION

The chart below shows the changes in Carrboro's ethnic composition since the 2010 Census.

Race and Ethnicity, 1990 to Present					
Sources: U.S. Census Bureau (decennial censuses)					
Year	Asian	Black	Hispanic *	White	All Other
2010	1592	1933	2706	12794	557
2020	1891	2142	2723	13238	1301
Year	% Asian	% Black	% Hispanic	White	% Other
2010	8%	10%	14%	65%	3%
2020	9%	10%	13%	62%	6%

* Any Race

AGE COMPOSITION

The age group of ages 18-64 accounts for 63.9% of the Town’s population, which is the only age group above the national average for Carrboro.

Age Group	Carrboro Population	% of Town	USA %
Under 5 years	809	3.8%	6.0%
Under 18 years	4,408	20.7%	22.3%
Age 18-64	13,608	63.9%	55.2%
Age 65 and over	2,470	11.6%	16.5%

Source: [U.S. Census Bureau QuickFacts: United States](#)

HOUSING

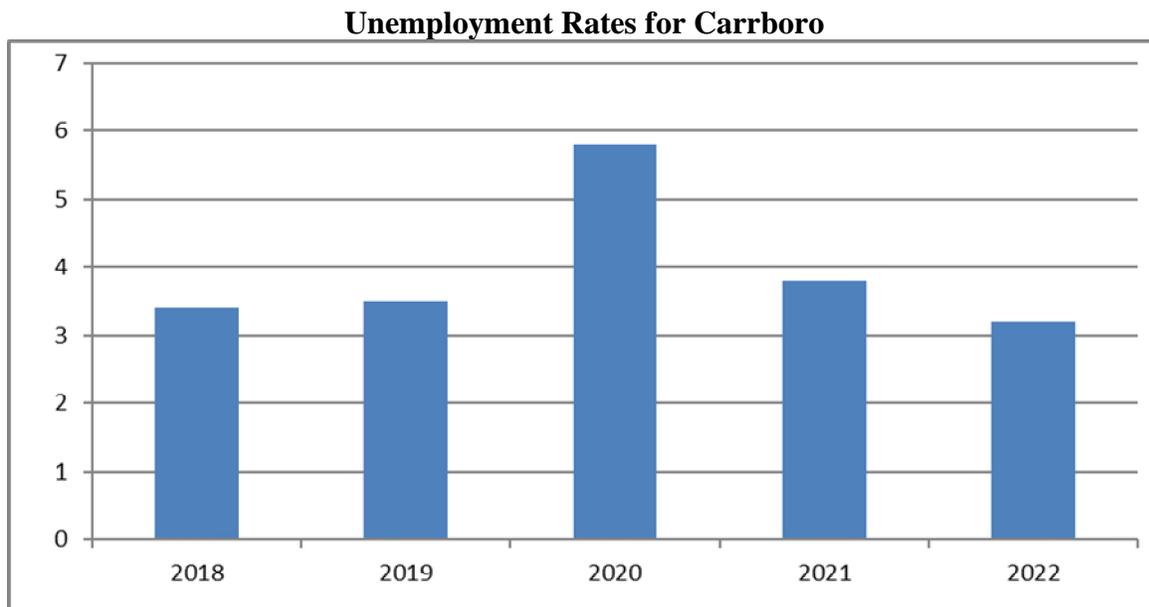
Carrboro continues to be mostly a community consisting of rental units as 57.4 percent of the housing stock is renter occupied with a median gross rent of \$1,152 per month. Owner-occupied housing is at 42.6 percent and the median value of an owner-occupied housing unit in Carrboro in 2020 was \$386,900, which is a 25.8 percent increase from \$307,600 in 2010.

INCOME

The 2020 median household income is \$67,469. Per capita income for 2020 was \$39,464 while 14.1% of the population were below the poverty level of income.

EMPLOYMENT

Employment levels in Carrboro reflect a slight decrease in the unemployment rate from 3.7% in June 2021 to 3.2% in June 2022.



Source: [Neighborhood Information | Homefacts](#)

Durham-Chapel Hill Employment by Industry Sector, May 2023

Occupation	Total Employment	% Employment
All Occupations	336,100	
Healthcare Practitioners and Technical Occupations	37,060	11.0%
Office and Administrative Support Occupations	35,210	10.5%
Educational Instruction and Library Occupations	27,730	8.3%
Management Occupations	27,600	8.2%
Business and Financial Operations Occupations	27,050	8.0%
Sales and Related Occupations	25,040	7.5%
Food Preparation and Serving Related Occupations	23,530	7.0%
Computer and Mathematical Occupations	21,610	6.4%
Transportation and Material Moving Occupations	18,810	5.6%
Life, Physical, and Social Science Occupations	12,960	3.9%
Healthcare Support Occupations	12,480	3.7%
Production Occupations	12,270	3.7%
Building and Grounds Cleaning and Maintenance Occupations	9,140	2.7%
Installation, Maintenance, and Repair Occupations	8,890	2.6%
Construction and Extraction Occupations	7,650	2.3%
Architecture and Engineering Occupations	6,830	2.0%
Protective Service Occupations	5,500	1.6%
Community and Social Service Occupations	4,950	1.5%
Personal Care and Service Occupations	4,620	1.4%
Arts, Design, Entertainment, Sports, and Media Occupations	4,580	1.4%
Legal Occupations	2,300	0.7%
Farming, Fishing, and Forestry Occupations	290	0.1%

Source: US Bureau of Labor Statistics Specific Data for Carrboro not available

The major employers within Orange County in 2021 (those with 500 or more employees) reflect the dominance of the professional services sector.

Employer	# of Employees
UNC Chapel Hill	13,029
UNC-Health Care System	12,078
Chapel Hill-Carrboro City Schools	2,000
Orange County Schools	1,272
Orange County Government	1,220
Town of Chapel Hill	857
Industrial Connections & Solutions ABB (formerly G.E.)	685

Key Intergovernmental Relationships

The Town of Carrboro has many relationships with surrounding communities, state, and regional organizations that impact and direct the services provided to the community and its residents and visitors. A summary of a subset of these relationships follows:

State of North Carolina

- Statutorily provides guidance for the Town to expend public funds
- Maintains (and constructs, as needed) a street system within the Town
- Acts as an intermediary for funding requests between the Town and the Federal Government as it relates to:
 - Transportation
 - Greenway infrastructure
 - Residential funding
- Collects and distributes certain revenues to the town, including:
 - Sales tax
 - Beer and wines taxes
 - Planning and development fees

Orange County

- Collects and distributes certain revenues to the town, including:
 - Sales tax
 - Beer and wines taxes
 - Planning and development fees
- Leads in discussions surrounding MUO's for neighboring municipalities

Central Pines Regional Council

- Provides planning and other services to Carrboro based on feedback on neighboring municipalities
- Includes one Town delegate and alternate
- Offers office and meeting space, for no charge, to town staff and residents as requested

UNC – Chapel Hill

- Shared facilities including greenways, technology infrastructure, and shared spaces
- Support of students attending UNC-Chapel Hill including access to fare-free public transport

Town of Chapel Hill

- Design and monitoring for traffic signalization
- Shared public transit services between municipalities
- Interlocal developmental agreements

GOVERNMENTAL STRUCTURE

The Town of Carrboro has a council/manager form of municipal government. Under the council/manager form of government, the Town Council performs the legislative functions of the town: establishing laws and policies. The Town Council is an elected body by the residents of Carrboro which consists of a mayor and five council members. The mayor and the council members are elected by the voters of the entire town. The mayor is elected to serve a term of two years and the council members are elected to serve staggered terms of four years. The mayor acts as the official head of town government and presides at council meetings. The mayor is a voting member of the council. He or she also appoints council members to advisory boards and committees.

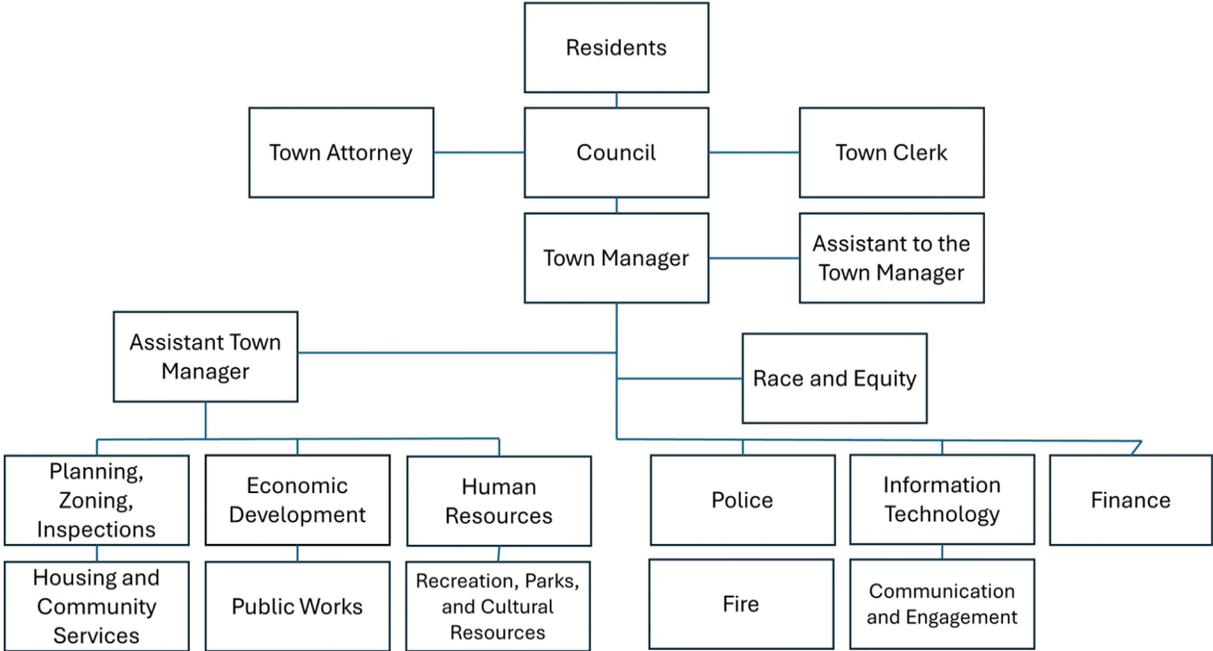
The Town Council also appoints a Town Manager who carries out the laws and policies enacted by the council. The Town Manager is responsible for managing the town's employees, finances, and resources. The Town currently has 175 permanent employees with all departments reporting to the Town Manager (see chart below). The Town Council also appoints a Town Clerk to maintain official town records; and an attorney, who represents the town administration and Town Council in all legal matters.

Local governments in North Carolina exist to provide a wide range of basic services on which we all depend, including police and fire protection; public works (garbage collection, street resurfacing, fleet maintenance, landscaping and building and grounds); planning; inspections and zoning; economic and community development; and parks and recreation programming. The major services provided by the Town include all the services above but exclude water and sewer services and tax collections. Certain large costs assumed by the Town reflect key services that are contracted with other governmental jurisdictions such as transit services, recycling, and landfill fees. The town also has administrative support units (human resources, technology, finance, budget, purchasing, town clerk, communications etc.) that provide both direct services as well as indirect support services.

The General Fund is the primary operating budget for the Town. The Town has a Special Revenue Fund and Capital Projects Fund. These are multi-year funds and dedicated to specific programs/activities/projects. The Town's Stormwater Utility Enterprise Fund includes an operating and capital budget for stormwater related revenues and expenditures. The Parking Enterprise Fund includes operating expenses related to parking facilities.

The budget for the Town is largely supported by property and local sales taxes. The Town, facing growth in the Northern Transition Area, envisions the potential increase in the town's population to 24,000. The Town, in an effort to reduce the tax burden on residential property owners, is exploring ways to increase its commercial tax base as a percentage of its tax base.

TOWN OF CARRBORO ORGANIZATIONAL CHART



TOWN COUNCIL PRIORITIES

The Town Council has not undertaken a formal strategic planning process. However, the Town Council has adopted and annually reviews strategic priorities for the Town with the ultimate goal of creating and maintaining Carrboro as a sustainable community that is a highly desirable place to live.

The current Town Council priorities (in bold) and departmental goals and work plans (in italics) are listed below:

Key Priorities:

Short-term:

- Staff retention, recruitment, and fulfillment.
- Land Use Ordinance & Economic Development.
- Environment: Stormwater and infrastructure improvements and environmental protection and tree-canopy.

Long-term:

- Race and Equity Initiatives: Implement Community Safety Task Force recommendations, race equity initiatives, and the accessible language plan.
- Multi-Modal: Multi-Modal Connectivity and Bolin Creek Greenway.
- Subsidization of Affordable Housing.

Budget Challenges:

- Meeting inflationary obligations for goods and services with flat revenue growth
- Expected increase in health insurance premiums.
- Increase in the contribution rate for the Local Governmental Employee Retirement System (LGERS).

To reflect these Council-defined goals, this budget cycle required strategic planning, clearly defined outcomes, and performance measurement.

As the 2024-25 departmental budgets were created, they reflected the following:

1. Total operating cost should align with 2023-24 actual cost, with anything budgeted over 3% of prior year expenditures requiring an explanation.
2. Personnel costs will be prepared by Finance and Human Resources and provided to departments in separate communications.
3. Requests for capital projects should be included in departmental budgets, including transportation funded projects and vehicle replacements prioritized outside of the CIP.
 - a. The financing plan or budget for facility renovations, construction, equipment, and vehicle replacement, should be reviewed with Finance Director prior to budget submission.

- b. Vehicle and equipment financing must
 - i. Be consistent with approved replacement schedule and prioritized; and,
 - ii. Have a current replacement evaluation for the vehicle and/or equipment.
 - c. If you are proposing to switch to a different type of vehicle or equipment, include an explanation as to why this is necessary. Requests that are not prioritized or lack a current replacement evaluation, will not be considered.
4. Requests for capital items not in the published CIP will not be considered for funding unless there is a documented impact or potential impact on the health, safety, and welfare of citizens or employees; and approved by the Town Manager.

Budgeting in Carrboro is a year-round event. After adoption of the operating budget in June, work on the CIP begins in September. Much of the work presented in the annual operating budget draws from the CIP, reports and assessments, community needs identified by residents, advisory boards, staff, and the Town Council.

Departmental budgets are prepared and justified using two components - a continuation budget with proposed change and/or expansion budget. In recognition that some costs incurred by the Town reflect increases beyond normal inflation, the continuation budget includes those costs, as well as expenditures where the Town or Council has made a legal or budgetary commitment. The inclusion of these costs in the continuation budget will allow the Town to maintain the same high levels of service provided in the current year with similar operating funds. These costs include projects and infrastructure expenditures reflected in the annual Capital Improvements Plan which includes street resurfacing costs, vehicles, equipment, various specific capital projects and debt service payments for capital commitments. Other ongoing annual costs in the continuation budget includes any pay adjustments for employees, and dependent and retiree health insurance, and numerous operating costs needed to provide daily services.

All other requests are categorized in a manner such that the Town Council and residents can understand the various dynamics involved in making funding decisions. Dynamics include improved service levels, and capital outlay – recurring capital outlay that does not meet the capital thresholds for consideration in the CIP. Justifications for proposed changes are based on the Town Council’s adopted goals as well as individual departmental goals and objectives.

Budget Development Calendar

Operating Budget Development Schedule for FY 2025

TASK	Target Date
Town Council Strategic Planning Retreat	February 3, 2024
Management Team Retreat (Strategic Planning)	February 8, 2024
Town Manager Presents Budget Needs to Management Team	February 28, 2024
Preliminary Revenue Estimate by Finance	February 28, 2024
FY25 Budget Instructions Distribution	March 26, 2024
Good Friday Holiday	March 29, 2024
Department Directors submit Budget Requests to Finance	April 5, 2024
Department Directors present budget to Town Manager & Finance Officer	April 8-12, 2024
Town Council Budget Work Session on FY 2024-2025 Budget (1)	April 16, 2024
Finance Drafts Manager's Recommended Budget	April 26, 2024
Town Council Budget Work Session on FY 2024-2025 Budget (2)	May 14, 2024
Manager Finalizes Presentation for the Town Council	May 21, 2024
Notice of Required Public Hearing	May 21 – June 10
Memorial Day Holiday	May 27, 2024
Manager Presents FY 2024-25 Recommended Budget to Town Council	June 4, 2024
Public Hearing / Town Council Adopts FY 2025 Budget	June 18, 2024

GENERAL FUND REVENUES

	FY2023-2024	FY2024-25
	Adopted	Adopted
AD VALOREM TAXES		
PRIOR YEAR TAXES	\$60,000	\$75,000
CURRENT YEAR TAXES	\$15,707,700	\$16,635,979
PENALTY AND INTEREST	\$32,500	\$35,000
AD VALOREM TAXES Total	\$15,800,200	\$16,745,979
LOCAL SALES TAXES		
LOCAL OPTION SALES TAX 1% 39	\$1,698,000	\$1,750,000
LOCAL OPTION SALES TAX 1/2% 40	\$1,343,500	\$1,443,500
LOCAL OPTION SALES TAX 1/2% 42	\$867,000	\$867,000
LOCAL OPTION SALES TAX 1/2% 44	\$31,000	\$31,900
CITY HOLD HARMLESS	\$2,176,500	\$2,176,500
LOCAL SALES TAXES Total	\$6,116,000	\$6,268,900
OTHER TAXES/LICENSES		
MOTOR VEHICLE LICENSES	\$390,000	\$390,000
MOTOR VEHICLE LIC - TRANS ONLY	\$81,000	\$85,000
MOTOR VEHICLE TAXES	\$1,100,000	\$1,159,000
MOTOR VEHICLE (ROSS RECEIPTS	\$47	\$47
REFUNDS - NCVTS	(\$32,000)	(\$32,000)
COLLECTION FEES - NCVTS	(\$40,000)	(\$40,000)
BEER & WINE LICENSE	\$2,214	\$2,103
HOTEL/MOTEL OCCUPANCY TAX	\$225,000	\$300,000
OTHER TAXES/LICENSES Total	\$1,726,261	\$1,864,150
UNRESTRICTED INTERGOVERNMENTAL		
FRANCHISE TAX	\$960,000	\$1,050,000
PIPED NATURAL GAS TAX	\$45,000	\$45,000
VIDEO SALES PROGRAMMING	\$62,000	\$62,000
DIRECT-TO-HOME SATELLITE SALES	\$50,000	\$50,000
WINE AND BEER	\$87,000	\$87,000
NC DOT RIGHT-OF WAY REM	-	-
SALES TAX-TELECOMMUNICATIONS	\$120,000	\$120,000
EMS LOCATION	\$27,000	\$27,000
UNRESTRICTED INTERGVMT Total	\$1,351,000	\$1,441,000
RESTRICTED INTERGVMT Total		

SUPPLEMENTAL PEG CHANNEL SUPPORT	\$53,000	\$53,000
POWELL BILL	-	-
PLANNING WORK GRANT	\$20,000	\$20,000
SOLID WASTE DISPOSAL TAX DIST	\$15,800	\$15,800
RECREATION-MUNICIPAL SUPPLEM	\$35,898	\$35,600
SEIZURES REVENUE STATE	\$5,000	\$5,000
SCHOOL TRAFFIC CONTROL	\$10,000	\$10,000
ABC BOARD GRANT	\$19,000	\$19,000
DEPT JUSTICE BLOCK GRANT	\$600	\$600
RESTRICTED INTERGVMT Total	\$159,298	\$159,000
SALES & SERVICES		
BANNER REVENUES	-	
RECREATION FEES	\$152,000	\$176,263
DISCOUNT-RECREATION FEES	(\$7,000)	\$0
SALES-MERCHANDISE & CONCESSION	\$2,700	\$2,700
TOWN CENTER FEES	\$55,000	\$94,051
DISCOUNT-TOWN CENTER FEES	(\$18,000)	\$0
MISCELLANEOUS	\$0	\$53,427
SALES & SERVICES Total	\$184,700	\$326,441
PERMITS & FEES		
STREET CUTS	-	
ENCROACHMENT FEE	\$2,200	\$2,200
TECHNICAL REVIEW-FUTURE EQUIPMT	\$60,000	\$60,000
COURT COST OFFICER FEES	\$3,500	\$3,500
PARKING VIOLATIONS	\$4,200	\$4,200
ANIMAL VIOLATIONS	\$7,000	\$7,000
FIRE PERMITTING FEES	\$2,000	\$2,000
FIRE DISTRICT FEES	\$600,000	\$600,000
SCHOOL RESOURCE OFFICER FEES	\$179,622	\$179,622
CAR SEAT SALES	\$200	\$200
BUILDING PERMITS	\$60,000	\$60,000
ELECTRICAL PERMITS	\$60,000	\$60,000
MECHANICAL PERMITS	\$70,000	\$70,000
RE-INSPECTION FEES	\$400	\$400
PLUMBING PERMITS	\$30,000	\$30,000
HOMEOWNERS RECOVER FEES	\$100	\$100
SIGN PERMITS	\$500	\$500

REFUSE COLLECTION FEES	\$500	\$500
REFUSE COLLECTION-DUMPSTER	\$57,000	\$57,000
DEVELOPMENT REVIEW FEES	\$27,000	\$27,000
DRIVEWAY PERMIT FEES	\$500	\$500
STREET CLOSING	\$500	\$500
TOWER REVENUE	\$142,389	\$142,389
NETWORK HUT LEASE	\$5,200	\$5,200
PERMITS & FEES Total	\$1,312,811	\$1,312,811
INVESTMENT EARNINGS		
INTEREST EARNED	\$15,000	\$188,880
INVESTMENT EARNINGS Total	\$15,000	\$188,879
OTHER REVENUES		
RENT-FARMERS MARKET	\$2,370	\$2,370
ATM FEES	\$700	\$700
CTDA CONTRIBUTION	\$98,400	\$98,400
MISCELLANEOUS	\$18,600	\$18,600
RISK MANAGEMENT/SAFETY REVENUE	\$20,000	\$20,000
REFUSE CART SALES	\$4,000	\$4,000
YARD WASTE CONTAINERS	\$4,000	\$4,000
LARGE COMPOST BIN	-	-
SMALL COMPOST BIN	-	-
DONATIONS	\$50	\$50
SALE OF LOTS	\$48,000	\$48,000
SALE OF FIXED ASSETS	\$60,000	\$60,000
SALE OF NON-FIXED ASSETS	\$5,000	\$5,000
OTHER REVENUES Total	\$261,120	\$261,120
OTHER FINANCING SOURCES		
TRF FROM CAPITAL PROJECTS FUND	-	
FUND BALANCE APPROPRIATED	\$2,404,059	\$4,117,371
OTHER FINANCING SOURCES TOTAL	\$2,404,059	\$4,117,371
TOTAL REVENUES	\$29,330,449	\$32,685,651

General Fund Revenue Descriptions

The following information briefly explains the major sources of revenue for the Town of Carrboro in the FY 2025 Budget.

AD VALOREM TAXES

The largest single source of revenue to municipalities in North Carolina is the Ad Valorem revenue which represents a tax paid by those owning property within the municipality. Ad Valorem Taxes or property tax income includes real property, motor vehicle and business personal property taxes. The General Assembly has approved various property tax exemptions for senior citizens aged 65 or older, and for residents, including veterans, who are 100% disabled and subsist on a specified household income.

LOCAL SALES TAXES

The State collects and distributes the proceeds from the local levied tax on retail sales consisting of a 1% sales tax (Article 39); and three ½% sales tax (Articles 40, 42 & 44). The Article 44 sales tax was implemented in 2002. Food is exempted from this tax. In exchange for Article 44, the General Assembly repealed local government reimbursements for inventory tax, intangibles tax, tax on food stamp purchases, and homestead exemption. In 2007, the General Assembly passed legislation to have the State assume county Medicaid costs and eliminate the Article 44 local sales tax. Effective October 1, 2008, the state took over one quarter cent of the Article 44 local options sales tax and effective October 1, 2009, the state took over the remaining one-quarter cent of that local tax. The legislation provides for municipalities to be completely reimbursed for the loss of their share of these tax revenues, including growth. The first one-quarter cent was replaced by a payment equal to 50% of the amount each municipality receives from the Article 40 local sales tax and the second one-quarter cent will be replaced by a payment equal to 25% of the amount each municipality receives for the Article 39 local sales tax.

Funds for the hold harmless payment to municipalities come from the counties' share of sales tax revenues. There is no expiration date on the hold harmless payments. The legislation also changes the distribution for the Article 42 local option sales tax from per capita to point of delivery distribution. A hold harmless provision ensures that this change will not affect municipal distributions.

OTHER TAXES AND LICENSES

This category of revenue is comprised of motor vehicle licenses, and hotel and motel room occupancy tax.

Motor Vehicle License Tax –The vehicle license fee is \$30 per car. The Town allocates \$5 of this motor vehicle license fee to offset costs paid by the Town for the transit partnership with Chapel Hill and UNC-Chapel Hill.

Hotel and Motel Room Occupancy Tax – The occupancy tax implemented in 2013 is 3% of the gross receipts derived from the rental of any room, lodging, or accommodation furnished by a hotel, motel, inn, tourist camp, or similar place within the Town that is subject to sales tax imposed by the State under G.G. 105-164.4(a)(3). The Town is required to distribute these receipts to the Carrboro Tourism Development Authority.

UNRESTRICTED INTERGOVERNMENTAL REVENUE

This category of revenue is primarily comprised of state-collected *local* revenues that are not directed to specific programs or services. This category of revenue was previously known as utility franchise tax.

Local Video Programming Revenues- Beginning January 1, 2007, local governments were no longer able to impose franchise taxes on video programming services. A sales tax on video programming services was added by the State that covered some of the same revenue received directly by local governments.

Electricity Sales Tax – As part of the tax reform legislation approved by the General Assembly in 2013, effective July 1, 2014, the general sales tax rate is applied to the sale of electricity. From the proceeds of that tax, 44 percent is allocated to be distributed to cities and towns. Each city receives a franchise tax share and an ad valorem share of these proceeds. The franchise tax share is equivalent to the electricity franchise tax distribution that each city received as its quarterly distribution in Fiscal Year 2013-14. If there is insufficient revenue to provide each municipality with the same distribution that it received in FY 2013-14, then every municipality's distribution will be reduced proportionally. If there is excess sales tax revenue after distributing every municipality's franchise tax share, then each municipality will receive an ad valorem share. The excess sales tax revenue will be distributed based on each city's ad valorem taxes levied as a percentage of all cities' ad valorem taxes levied [G.S. 105-164.44K].

Piped Natural Gas Sales Tax - As part of the tax reform legislation approved by the General Assembly in 2013, effective July 1, 2014, the general sales tax rate is applied to the sale of piped natural gas. From the proceeds of that tax, 20 percent is allocated to be distributed to cities and towns. Each city receives a franchise tax share and an ad valorem share of these proceeds. The franchise tax share is equivalent to the piped natural gas franchise tax distribution that each city received as its quarterly distribution in Fiscal Year 2013-14. If there is insufficient revenue to provide each municipality with the same distribution that it received in FY 2013-14, then every municipality's distribution will be reduced proportionally. If there is excess sales tax revenue after distributing every municipality's franchise tax share, then each municipality will receive an ad valorem share. The excess sales tax revenue will be distributed based on each city's ad valorem taxes levied as a percentage of all cities' ad valorem taxes levied [G.S. 105-164.44L].

Wine and Beer Tax – provides for the distribution of state beer tax collections to local governmental units in which beer is legally sold. It further provides for taxes on unfortified wine and 22% of collections for taxes on fortified wine to local governmental units in which wine is legally sold. This revenue is distributed on a per capita basis.

Telecommunication Sales Tax- In 2001, the General Assembly replaced the utility franchise tax on local telephone service with a new sales tax on telecommunications.

RESTRICTED INTERGOVERNMENTAL REVENUE

Restricted intergovernmental revenues represent state and federal grants or other local governmental revenues received for specific purposes by the Town, the largest of which is the recurring Powell Bill grant funds for street resurfacing and maintenance. However, in FY22, an

accounting change, adopted by the Town Council, moved this revenue source to a Special Revenue Fund so it is no longer being reported in the General Fund.

Powell Bill – These grant revenues are generated from the State’s gasoline tax and a percentage of this tax is returned to the municipality through a formula based on population and street mileage. Powell Bill funds can only be used for street maintenance, construction, traffic signs, sidewalks, curbs, gutters, drainage, and other street related needs.

Durham-Chapel Hill-Carrboro Urban Area Planning Work Program Grant – This grant provides support toward the Transportation Planner salary costs.

Recreation Municipal Supplement – Orange County provides a supplement to the Town for recreation programs in recognition of Town services offered to county residents.

ABC (Alcoholic Beverage Control) Board Grant – The Police Department applies annually for a grant to assist the ABC Board in managing alcohol violation programs.

FEES AND PERMITS

The Town charges various types of permits and fees to residences and commercial establishments needing specific services. A large portion of the fees and permits received by the Town relate to development and growth within the Town.

Fire District Fees - The Carrboro Fire Department provides fire protection services to the South Orange Fire District located in Orange County and outside of the Town’s limits. A three-member fire district board meets annually and approves the tax rate for the fire district based on a formula developed by the County and the Town of Carrboro. Orange County pays the Town for the fire protection services based on the approved fire district tax rate.

Chapel Hill-Carrboro School District - It is anticipated that the Chapel Hill Carrboro School District will continue to contract with the Town to provide two School Resource Officers and traffic control management. One officer is stationed at McDougle Middle School and one at Carrboro High School.

Development Review Fees - Applicants wishing to receive a Zoning Permit, Special Use Permit A, or Special Use Permit B must pay the appropriate fee for the Town to review plans for adherence to the Land Use Ordinance before a permit may be issued. The fee is paid one-time even though the plans may be reviewed multiple times before a permit is issued.

Building Permits are issued on new and existing buildings when the buildings are renovated or newly constructed for commercial property, single-family dwellings, townhouses, condominiums, and duplexes.

Electric Permits are issued on new and existing buildings for service changes, premises wiring and commercial up-fits.

Mechanical Permits are issued on new installation of residential and commercial buildings and replacement of heating and cooling equipment.

Plumbing Permits are issued on new and renovated buildings i.e., water and sewer, irrigation and backflow.

Dumpster Collection Fees are for the pickup and disposal of all refuse the Town collects from all commercial dumpsters in Town.

Tower Revenue - The Town owns a cell tower and leases space via a multi-year contract for antennas.

SALES AND SERVICES

Recreational Fees and Town Center Fees represent fees for a variety of recreational services and activities offered to town residents. The Town's Park facilities, such as picnic shelters, ball fields and the multi-purpose areas are also available for rent. The Town also offers for rent meeting rooms and facility space within the Century Center to the public for various functions.

INVESTMENT EARNINGS

Interest Income - The Town generates interest income by investing idle cash in interest paying checking accounts and money market accounts.

OTHER REVENUES

Other Revenues are a very small portion of the Town's overall revenue stream. This revenue consists of donations, rent, reimbursements for town services provided to other jurisdictions, fixed asset sales, and other sundry sales.

OTHER FINANCING SOURCES

This category of revenue represents debt proceeds received by the Town or funds that are transferred from another fund. Highlights include:

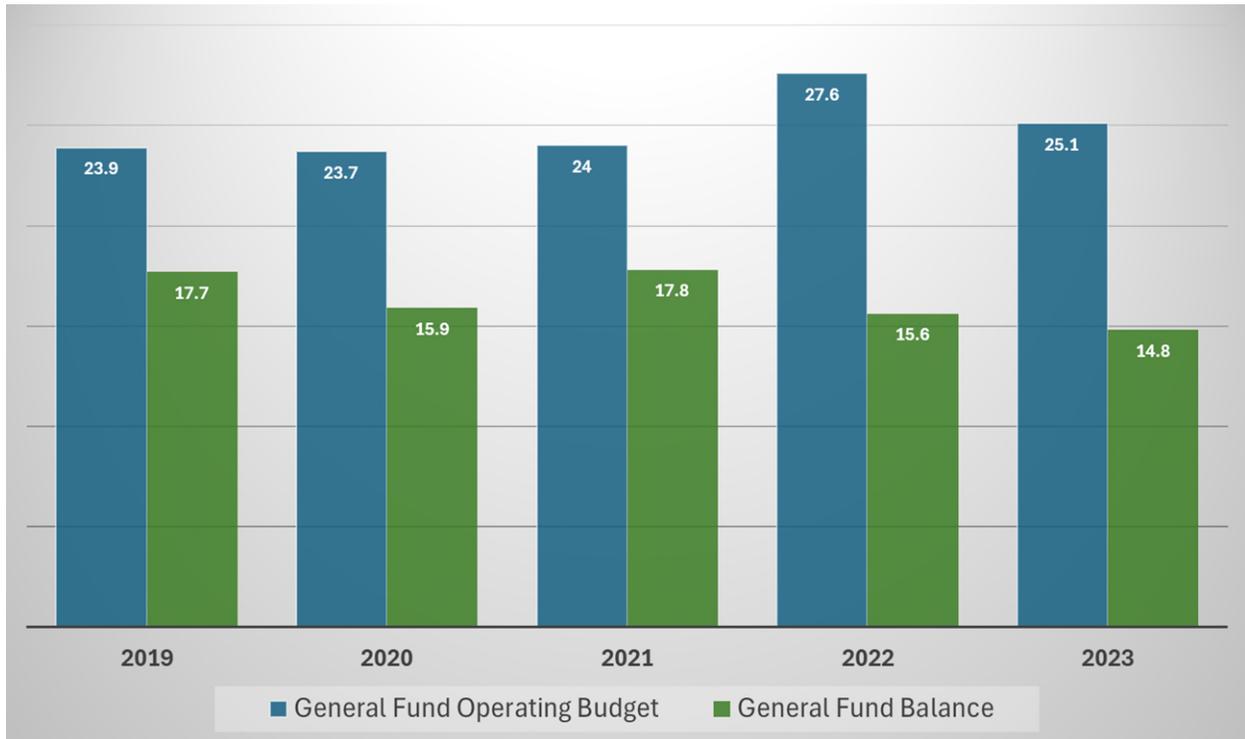
Lease-purchase – This represents the full cost of equipment or other major capital purchases that the Town obtains through installment financing. Following generally accepted accounting practices, the full cost of the financed equipment is budgeted (equipment purchased in that fiscal year) in addition to the lease payment. However, an offsetting entry equal to the full cost value of the equipment is budgeted on the revenue side as lease proceeds. Thus, the true tax impact of the financed equipment is the lease and debt service payment only.

Transfers from Other Funds – While the General Fund is the major operating budget for the Town, several other funds exist where the Town may choose to transfer resources between funds.

FUND BALANCE APPROPRIATED

Funds accumulated when the receipt of total revenues exceed the total of actual expenditures results in the creation of fund balance or reserves. During the budget process, an appropriation of fund balance may sometimes be necessary to balance projected revenues with projected expenditures. An adjustment to fund balance may also occur during the fiscal year to account for unanticipated expenditures.

Historical General Fund as of June 30 (\$M)



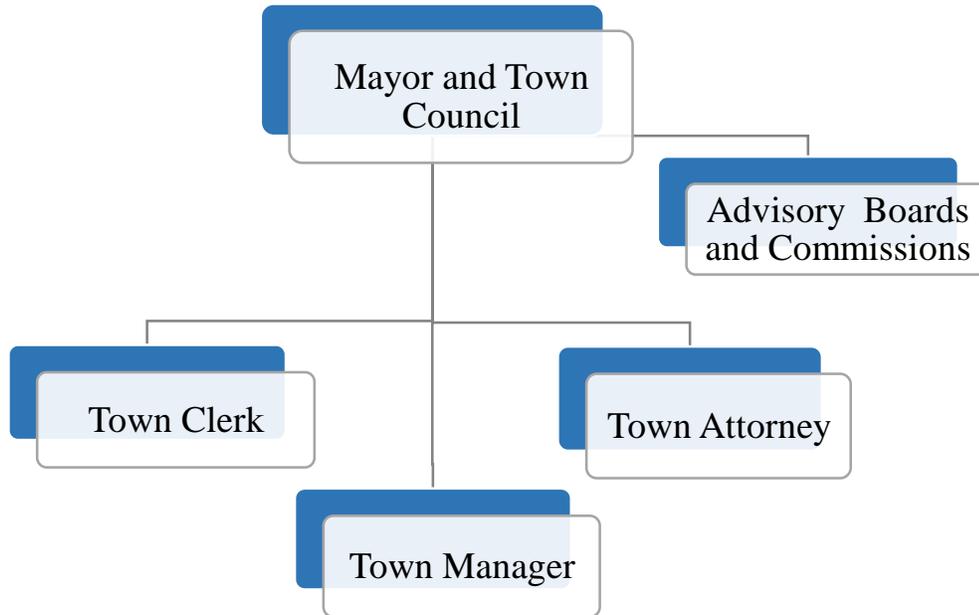
Fund Balance at the end of FY 2023 was \$14.8M, a decrease of \$800,000 from FY 2022.

General Fund Budget Summary

Departments	Personnel Costs	Operating Costs	Transfers	Total
410 - MAYOR AND TOWN COUNCIL	\$132,925	\$335,216		\$468,141
415 - ADVISORY BOARDS & COMMISSIONS		\$64,291		\$64,291
419-RACE AND EQUITY	\$279,013	\$150,000		\$429,013
420 - TOWN MANAGER	\$636,738	\$228,981		\$865,719
421 - ECONOMIC DEVELOPMENT	\$122,080	\$241,440		\$363,520
422 - CLIMATE ACTION	\$201,869	\$63,556		\$265,424
423 - COMMUNICATION & ENGAGEMENT	\$219,854	\$61,000		\$280,854
425 - HOUSING AND COMMUNITY SERVICE	\$280,661	\$354,820		\$635,481
426 - TOWN CLERK	\$148,744	\$28,830		\$177,574
445 - FINANCE	\$746,061	\$617,719		\$1,363,780
446 - HUMAN RESOURCES	\$653,097	\$108,710		\$761,807
447 - TECHNOLOGY SERVICES	\$467,737	\$1,927,600		\$2,395,337
500 - POLICE DEPARTMENT	\$3,859,930	\$574,209		\$4,434,139
530 - FIRE DEPARTMENT	\$3,143,038	\$361,744		\$3,504,782
540 - PLANNING DEPARTMENT	\$1,504,296	\$735,895		\$2,240,191
543 - TRANSPORTATION		\$2,366,281		\$2,366,281
550 - PUBLIC WORKS DEPARTMENT	\$2,652,807	\$2,060,368		\$4,713,175
600 - RECREATIONS & PARKS	\$1,511,080	\$821,810		\$2,332,890
660 - NONDEPARTMENTAL	\$2,108,382	\$1,000,000		\$3,108,382
661 - TRANSFERS			\$216,000	\$216,000
DEBT SERVICE		\$1,698,871		\$1,698,871
				\$0
Total Expenditure	\$18,668,311	\$13,801,340	\$216,000	\$32,685,651

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MAYOR AND TOWN COUNCIL



PURPOSE

As elected officials within the framework of the council-manager form of town government, members of the Town Council make decisions and set policies to ensure the safety, health, attractiveness, and social well-being of the community.

GOALS

- Diversify revenue stream to maintain ethnic and economic diversity.
- Protect historic neighborhoods and maintain Carrboro's unique identity.
- Improve walkability and public transportation.
- Encourage development that is compact, dense, and appeals to diverse lifestyles and incomes.
- Enhance and sustain quality of life / place issues for everyone.

SERVICES PROVIDED & ACTIVITIES

- Establishes annual goals for the organization.
- Reviews, reinforces, or alters public policies and long-range planning governing municipal operations and functions.
- Establishes priorities and funding limits through adoption of an annual budget.
- Grants or denies requests for conditional use permits.
- Responds to and communicates with citizens regarding their concerns, perspectives, and initiatives.
- Supervises work and responsibilities of Town Manager, Town Attorney, and Town Clerk.
- Makes appointments to and serves on committees and task forces.
- Participates in county and regional-wide planning and establishment of public policy.

PREVIOUS YEAR ACCOMPLISHMENTS

- Maintained Standard and Poor AAA (“triple A”) Bond Rating.
- Tree City USA for 38th year.
- Continued work on Historic Rogers Road Infrastructure.
- Maintained Silver Level Designation from the League of American Bicyclists.
- Maintained certification as Orange County Certified Living Wage Employer.
- Continued work regarding stormwater utilities.
- GARE training.
- Continued work on the Carrboro Connects Comprehensive Plan 2022-2042 and identified/adopted 13 key strategic priorities from the Comprehensive Plan.

UPCOMING FISCAL YEAR OBJECTIVES

Key Priorities:

Short-term:

- Staff retention, recruitment, and fulfillment.
- Land Use Ordinance & Economic Development.
- Environment: Stormwater and infrastructure improvements and environmental protection and tree-canopy.

Long-term:

- Race and Equity Initiatives: Implement Community Safety Task Force recommendations, race equity initiatives, and the accessible language plan.
- Multi-Modal: Multi-Modal Connectivity and Bolin Creek Greenway.
- Subsidization of Affordable Housing.

Budget Challenges:

- Meeting inflationary obligations for goods and services with flat revenue growth
- Expected increase in health insurance premiums.
- Increase in the contribution rate for the Local Governmental Employee Retirement System (LGERS).

Budget Summary- Mayor and Council Members

Department

MAYOR AND TOWN COUNCIL	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$129,053	\$132,925
Operating Exp	\$316,890	\$335,216
TOTAL	\$445,943	\$468,141

ADVISORY BOARDS AND COMMISSIONS

PURPOSE

The Advisory Boards and Commissions advised the Town Council on issues and policy decisions as provided for in the Carrboro Town Code.

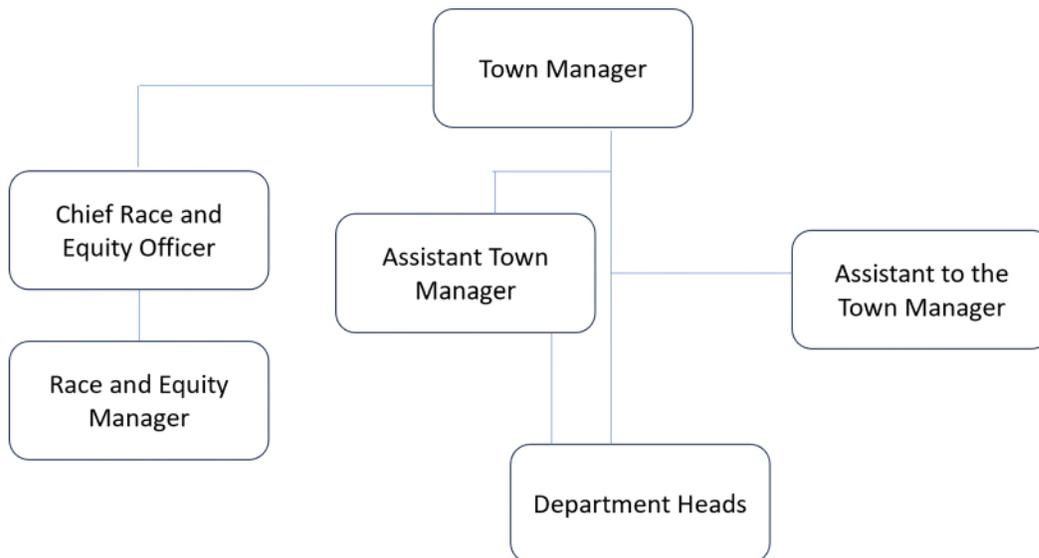
SERVICES PROVIDED & ACTIVITIES

- Review and make comments to the Town Council on proposed policies, plans and ordinances.
- Make recommendations to the Town Council as to the need for policies and ordinances.

Budget Summary- Advisory Boards and Commissions

Department	FY 2024	FY 2025
ADVISORY BOARDS	Adopted	Adopted
Personnel Exp	\$ -	\$ -
Operating Exp	\$62,418	\$64,291
TOTAL	\$62,418	\$64,291

TOWN MANAGER



PURPOSE

The Town Manager serves as primary advisor to, and implements the policies of, the Mayor and Council Members. The Town Manager communicates these policies to residents and staff, and effectively organizes and manages staff and resources to respond to the community and residents' needs. All Department Directors report directly to the Town Manager and the Assistant Town Manager. The Town Manager is further assisted by an Assistant to the Town Manager. The Town Manager's Office also contains the Race and Equity Division composed of the Chief Race and Equity Officer and the Race and Equity Manager who work to facilitate racial equity into Town policies, processes, practices, and services and maintain and increase community, county, and regional partnerships.

GOALS

- Help all residents in Carrboro to live in a more just and equitable community.
- To lead an organization that functions well internally and implements Council policies in a timely, effective, efficient, and friendly manner.
- To give well-informed, helpful advice to the Council Members on Policy options and other matters.
- To facilitate effective Council action through the presentation of clear, concise agendas.
- To adhere to the professional code of ethics and always work towards the long-term best interests of the Town.
- Reduce racial disparities within Town government.
- To ensure staff satisfaction and retention.
- To communicate Town policies, decisions, and activities clearly and efficiently to residents and staff.

- To coordinate and facilitate embedding racial equity into Town policies, practices, and services.

COUNCIL’S STRATEGIC PRIORITIES AND DELIVERABLES

- Ensure Implementation of Priorities and Deliverables

SERVICES AND PROGRAM ACTIVITIES

- Provide general guidance and support to town departments in achieving townwide goals and objectives.
- Seek capital improvement strategies to meet the needs of the town and organization.
- Provide regular reports and updates to the Town Council.
- Study, develop, and implement policy and program recommendations at the direction of the Town Council.
- Provide support for the Town Council.
- Represent the town’s interests on local, regional, and state-wide bodies dealing with issues important to Carrboro.
- Conduct and facilitate public communication with the Town Council, residents, employees, and other users of town services.
- Serve as staff liaison on various advisory boards, commissions, and committees.
- Conduct GARE training for all employees.
- Educate employees and community about advancing equity and establishing a sense of belonging.

PREVIOUS YEAR ACCOMPLISHMENTS

- Hired a Town Manager and Assistant to the Town Manager.
- Operationalized American Rescue Plan Act (ARPA) Spending Allocation Plan.
- Completed an organizational staffing study.
- Partnered with One Orange to create and house a Racial Equity Index dashboard that reflects racial data within Orange County.
- Adoption of first racial equity action plan, Weaving Equity in Carrboro Town Government.

UPCOMING FISCAL YEAR OBJECTIVES

- Create and hire a Chief Sustainability Officer.
- Complete an updated compensation study.
- Implement the recommendations of the staffing study.
- Continue focus on staff recruitment, retention, and organizational development.
- Adopt an organizational strategic plan including vision and mission statements along with core values.
- Develop and adopt a performance management plan.
- Complete the 203 Project.
- Finalize Town Hall Renovation Design.

- Manage Carrboro Connects implementation.
- Manage Racial Equity Action Plan implementation.

RACIAL EQUITY ASSESSMENT

1. What race and equity goals and performance measures have been established for your department?

The Town Manager’s Office has several inclusion goals that have been established. The primary goal is to carry out the Government Alliance on Race Equity (GARE) training for all employees and leading using the GARE Change Approach – visualize, normalize, organize, and operationalize our work. This training seeks to educate employees on how they play an important role in promoting equity for all and how to view and frame their decision making as they carry out their normal duties. The Town Manager’s Office also contains the Race and Equity division which includes the positions of Chief Race and Equity Officer and the Race and Equity Manager. These two positions work diligently to promote equity and inclusion, to ensure that the policies practices and procedures for the town are equitable, and to continue to offer trainings for employees. The Town Manager’s Office has had several successes related to racial equity and inclusion goals.

2. Describe race and equity accomplishments to date.

Implementing the first racial equity action plan – Weaving Equity in Carrboro Town Government and as previously mentioned, the most significant accomplishment is the completion of GARE training by all employees. This training sets our employees on a path of continuously including race and equity in decision making. Another significant success is the confirmation of our Chief Race and Equity Officer and the hiring of a Race and Equity Manager. These two positions round out the Race and Equity team and allow for the appropriate amount of attention and staff energy dedicated to this work. Another success is including the race and equity assessment pocket questions to all agenda items. This allows for Council to make better decisions given the potential equity impacts of the agenda items presented to them.

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally? The critical factors affecting the department’s ability to address racial equity and inclusion are staff time, the policies and procedures that originate from the Town Manager’s Office, the ongoing effort to recruit and retain diverse employees, and carrying out the policy decisions of the Town Council in an equitable manner.

4. How do current projects address racial equity and inclusion. Please provide special examples.

Many of the current and future projects of the Town Manager’s Office address race and equity. The ongoing effort to fill several interim department head positions with diverse candidates is one example. The TMO is also working on updating the administrative policies and procedures for the Town to ensure that they promote equity and inclusion. The TMO also has the overall responsibility of implementing Council priorities and the Comprehensive Plan, many of which include race and equity projects.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

The Town Manager’s Office (TMO) has several climate and sustainability goals that they support. As the central hub for the Town, the TMO supports all climate and sustainability goals. The most significant ones are the implementation of the comprehensive plan and all the sustainability goals that are included. The most significant climate and sustainability goals accomplished to date for the TMO is the passage of the comprehensive plan and the establishment of Council priorities which will guide the ongoing work of the Town.

Budget Summary- Town Manager

Department	FY 2024	FY 2025
TOWN MANAGER	Adopted	Adopted
Personnel Exp	\$618,192	\$636,738
Operating Exp	\$133,462	\$228,981
TOTAL	\$751,654	\$865,719

Budget Summary- Race & Equity

Department	FY 2024	FY 2025
RACE & EQUITY	Adopted	Adopted
Personnel Exp	\$270,886	\$279,013
Operating Exp	\$150,000	\$150,000
TOTAL	\$420,886	\$429,013

ECONOMIC DEVELOPMENT
1FTE



PURPOSE

To support the economy, arts and culture; foster a business friendly and supportive environment that encourages local enterprises and social businesses to expand in and new businesses to locate in Carrboro; increase awareness of Carrboro as an arts and entertainment destination; support the travel and tourism industry; and encourage light manufacturing and enterprises.

GOALS

- Create a more inclusive (occupation, wages, education level, etc.) economy.
- Develop a more place-based, resilient, and more walkable economy.
- Grow the arts and entertainment sector.
- Transition our economy to one based in the green industry-sector.
- Reduce friction and barriers to redevelopment.
- Encourage more business start-ups and growth, preferably in the tech industry.
- Create more racial equity in business growth and start-ups.
- Promote travel and tourism in Carrboro and raise awareness of Carrboro as a destination.
- Seek to provide adequate parking in the downtown to support existing and potential businesses.

SERVICES PROVIDED & ACTIVITIES

- Be a resource for developers and new or expanding businesses to facilitate location of vacant space, the project review process, and project implementation.
- Administer the Revolving Loan Funds including the application processing and billing.
- Provide staffing and administrative support to the Economic Sustainability Commission.
- Provide staffing and administrative support to the Carrboro Tourism Development Authority.
- Be the liaison to the Carrboro Business Alliance.
- Serve on the Chapel Hill Orange County Visitor Bureau Board as Town staff liaison.
- Update and implement the action items of the Economic Sustainability Plan.
- Promote Carrboro through the Carrboro Tourism Development Authority.

- Provide business assistance and support to new and expanding businesses.
- Manage leases for town leased public parking.

PREVIOUS YEAR ACCOMPLISHMENTS

- Reevaluating and revamping the Town’s Revolving Loan Program to make it more accessible to all types of businesses.
- Initiated the Disparity Study.
- Developing and implementing business training and networking for BIPOC businesses through Boost Carrboro.
- Provided BIPOC business support and growth through pop-up events in partnership with Empowerment.
- Retained a firm to develop a Downtown Master Plan.

UPCOMING FISCAL YEAR OBJECTIVES

- Beginning implementation of Economic Sustainability portions of the Comprehensive Plan.
- Implement a downtown paid parking and parking enforcement program.
- Continue to develop and maintain a commercial real estate database for Carrboro.
- Continue to collaboratively work and partner with Chapel Hill, Orange County, and Chamber Economic Development Staff to resolve regional ED issues.
- Continue to work with the Carrboro Business Alliance.
- Continue outreach to entrepreneurs, encourage makers, and support freelance workers.
- Increase minority business outreach efforts by continuing an annual CBA scholarship program for membership in the CBA.
- Develop an Economic Sustainability Dashboard to continually monitor economic metrics.
- Complete the Disparity Study.

COUNCIL PRIORITIES

1) How does your requested budget address a key strategic area?

Due to the small budget of the Economic Development Department, there are no major key strategic areas that this proposed budget is significantly contributing to. However, Staff time will be dedicated to the LUO rewrite and the growth and support of nontraditional entrepreneurial enterprise through accelerator/entrepreneurial programs. Other economic development priorities are not specifically listed in the council priorities, so it is difficult to specifically address broadly what Council is referring to.

2) What is your long-term goal in funding to achieve these priorities?

Continuing to appropriately support staffing in order to assist with the LUO rewrite will be critical. Additionally, accelerator and entrepreneurial programming often takes time to develop appropriate community, so an annual commitment to these programs will be crucial to developing the desired ecosystem.

- 3) **What are the critical factors affecting your department in accomplishing these priorities.**

Time availability for staff is the biggest critical factor at this moment.

OBJECTIVES

- 1) Diversify and expand the commercial tax base to create more high paying jobs in town and to promote the town's image as a place for businesses.
- 2) Support entrepreneurs, makers and freelancers' development, including services, infrastructure, and job development.
- 3) Support locally owned and operated businesses for a strong local economy.
- 4) Create a more inclusive (occupation, wages, education level, etc.) economy.
- 5) Develop a more place-based, resilient, and more walkable economy.
- 6) Grow the arts and entertainment sector.
- 7) Transition our economy to one based in the green industry-sector.
- 8) Reduce friction and barriers to redevelopment.
- 9) Encourage more business start-ups and growth, preferably in the tech industry.
- 10) Create more racial equity in business growth and start-ups.

RACIAL EQUITY ASSESSMENT

- 1) **What race and equity goals and performance measures have been established for your department?** We are continuing to roll out BIPOC-centric programming through the use of ARPA funds. These include BIPOC Business Pop-Up events, BIPOC Business Coaching and Training, as well as targeting an average of 24% of all programming participants being BIPOC.
- 2) **Describe race and equity accomplishments to date.** This year so far, the Department has funded the hosting of BIPOC pop-up events, BIPOC entrepreneurial coaching programs, and supported/participated in the Minority Vendor Fair with Chapel Hill and UNC.
- 3) **What are the critical factors affecting the department's ability to address racial equity and inclusion, internally and/or externally?** Funding is the biggest critical factor affecting the department's ability to address racial equity and inclusion. Due to the size of our department, we primarily outsource most of the racial equity work we do through event and training contractors.
- 4) **How does the current project address racial equity and inclusion?** Please provide specific examples (new initiatives). The current budget addresses racial equity and inclusion by continuing to fund BIPOC business training, pop-up events, and (depending on the results of the Disparity Study) BIPOC vendor recruitment and development.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

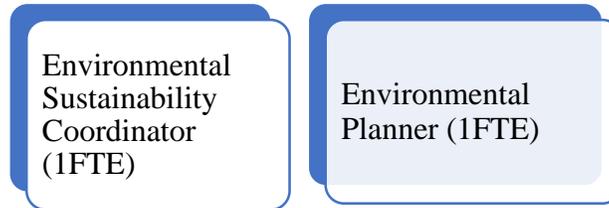
- 1) **What climate change and sustainability goals and objectives have been established for your department?** The Department focuses on sustainable businesses and economy by working to create a circular economy and ensuring a new business fulfills a need within the community.
- 2) **Describe climate change and sustainability accomplishments to date.** The Department has expanded the Business Revolving Loan Program to include agricultural-based businesses outside of the Town Limits to encourage the development of foundational businesses and producers that help support businesses within the Town while minimizing transportation costs (e.g. farmers outside of Town that might supply meats or produce to a restaurant in Town).
- 3) **Based on assessment(s), what are the critical factors affecting the department’s ability to address climate change and sustainability, internally and/or externally?** While the department can strive to support a more circular economy, there is limited ability for the department to make significant progress towards this end due to the limited size of our jurisdiction. Additional funding could produce informational and educational opportunities, but implementation would have to be reserved to the private sector.
- 4) **How does the requested budget address climate change and sustainability?** Please provide specific examples. While there are no specific projects or initiatives that are identified in this budget, staff do continue to dedicate time to supporting circular economy efforts as well as general support for environmental planning initiatives (such as the Energy Efficiency Revolving Loan).

Budget Summary- Economic Development

Department	FY 2024 Adopted	FY 2025 Adopted
ECONOMIC DEVELOPMENT		
Personnel Exp	\$118,524	\$122,080
Operating Exp	\$290,568	\$241,440
TOTAL	\$409,092	\$363,520

CLIMATE ACTION

2 FTE



PURPOSE

The Climate Action cost center captures the staff and programs involved with coordination of implementation of the Town's Energy and Climate Protection Plan (ECPP/ 2014), which focuses on Town interests and responsibilities, and the Community Climate Action Plan (CCAP/2017), which expresses the Town's community greenhouse gas emissions reduction goals and actions to be undertaken by the broader community in order to achieve greenhouse gas reduction targets.

GOALS

- Utilize the ECPP to guide program development, budgeting and the Capital Improvement Program towards responsible municipal energy management and greenhouse gas reductions and goal of 80% reduction in 2010 levels of municipal greenhouse gas emissions by 2030.
- Utilize the CCAP to coordinate programs, service, and partnerships to engage the community and assist with reducing community greenhouse gas emissions while raising awareness of and involvement in solutions to global climate change and a post-carbon energy future, including adaptation to changes, and enhancing ecosystem resilience, transportation and food choices.
- Communicate broadly about these reduction goals and the benefits of climate change mitigation, including financial savings through energy efficiency, the creation of new jobs, improved air quality and public health, and healthier forests and streams.

ADDRESSING COUNCIL'S BUDGET AND LONGER-TERM STRATEGIC PRIORITIES

- Land Use Ordinance and Economic Development
- Environment – specifically environmental protection and tree canopy
- Race and Equity Initiatives – Addressing Environmental Justice of Climate Impacts
- Multi-Modal Connectivity
- Deliverables: Measured reductions in the Town's and Community's greenhouse gas emissions; Ecosystem benefits of tree canopy and open space; Outreach and engagement per One Orange Racial Equity Framework

SERVICES AND PROGRAM ACTIVITIES

- Coordinate implementation of the ECPP and CCAP, including technical reports and analyses and community outreach.
- Pursue emissions reduction and sustainability in all Town efforts.
- Ensure racial equity is incorporated in all ECPP and CCAP implementation.
- Represent the Town in collaborative climate action-related initiatives and sustainability efforts.
- Housed in the Planning Department with support and coordination from associated divisions.

PREVIOUS YEAR ACCOMPLISHMENTS

- Staff liaison to the Environmental Advisory Board and Climate Action Team.
- Developed climate action outreach messaging.
- Represented Town in collaborative initiatives and sustainability organizations.
- Completed racial equity assessment lenses for CCAP initiatives.
- Administered Green Neighborhoods Grant Program with six grant recipients and launched the second round of funding.
- Completed two rounds of Solarize the Triangle Program.
- Launched a Leave Your Leaves campaign.
- Management of Town Fleet Alternative Fuels Analysis.
- Outreach and reporting for annual Bee City USA and Mayors' Monarch Pledge programs.
- Edited and finalized presentations for the Modules Project.
- Served as Town representative for regional collaborative efforts to submit funding proposals to climate action programs funded by the 2021 Bipartisan Infrastructure Law and 2022 Inflation Reduction Act.
- Supervised intern in creation and launch of a Multifamily Composting Pilot Project

UPCOMING FISCAL YEAR OBJECTIVES

- Develop a budgeting and accounting tool to track Town climate action activities.
- Expand awareness of Green Neighborhood Grant Program and projects.
- Renew Interdepartmental Staff Climate Action Team.
- Evaluate expanded curb/community compost collection options.
- Complete redesign and relaunch the Energy-Efficiency Revolving Loan Fund.
- Launch a task force that includes landlords and tenants towards improved energy efficiency and renewable energy for rental communities.
- Advocate for renewable energy and large-scale energy generation in development review process and through partnerships with public agencies and organizations.
- Increase outreach related to food choices.
- Develop schedule of quarterly volunteer invasive species removal at Town properties.
- Implement FY 2025 Bee City USA and Mayors' Monarch Pledge activities.

PERFORMANCE MEASURES

Calculate emission reductions related to each project and initiative implemented.
Track progress towards emissions reduction goals outlined in the Energy and Climate Protection Plan and Community Climate Action Plan.
Monitor and track engagement with residents and associated emissions reductions.
Report regularly on progress to Town Council.

RACIAL EQUITY ASSESSMENT

1) What racial equity and inclusion goals and objectives have been established for your department?

- Evaluate all departmental policies, practices, and procedures using racial equity lens
- Community Climate Action Plan (CCAP) Community Integration Recommendation #8:
 - The Town should utilize the Government Alliance on Race and Equity (GARE) racial equity toolkit to apply a racial equity lens when developing and implementing all climate action initiatives.
 - Community-based participatory research and participatory democracy concepts should be considered when deciding how best to work with community members to achieve goals.
 - The Town should utilize relevant mapping tools and other resources when evaluating projects and impacts.
 - In conjunction with the policies and procedures analyzed using racial equity toolkits through the GARE initiative, utilize racial equity impact assessments.
 - Implement proactive outreach procedures.
- CCAP Appendix 6: *Racial Equity Toolkit: Evaluating the Town of Carrboro's Community Climate Action Plan* by Radhika Kattula, Amena Saad, and Helen Johnston. The report's three primary recommendations are:
 - Implement participatory budgeting in Carrboro, in which the citizens of Carrboro can decide how to divide the town's budget for the climate plan in the short-term.
 - Set up a revolving loan fund with a more accessible application process to target public health concerns in Carrboro's marginalized areas.
 - Initiate a community based participatory research program as a method for the town government and citizens to jointly assess existing programs and partners in the community.

2) Describe racial equity and inclusion accomplishments to date.

- The updated ECPP and CCAP goals (2020) were formulated using principles and research related to climate justice.
- Community Integration Recommendation #8 and Appendix 6 added in 2020.
- Targeted outreach performed for initial Green Neighborhoods Initiative events.
- The Green Neighborhoods Grant Program rubric awards points for the following:
 - Applicant engaged low-income households or communities of color when developing the project.

- Households benefiting directly from the project exhibit a median home value below Carrboro's median home value (\$350,800) and/or a median rent below Carrboro's median rent (\$1,036/month).

3) Based on assessment(s), what are the critical factors affecting the department's ability to address racial equity and inclusion, internally and/or externally?

- Disaggregated data showing the impacts of climate on the community by race is not presently available, however, nationwide, it has been identified that low-income households and communities of color are disproportionately impacted by the effects of climate change, e.g. living in aging, less-insulated and weatherized housing which will cost more to heat and cool and will be more susceptible to impacts from flooding and other environmental impacts. These groups will continue to be increasingly vulnerable without resources to adapt to the changing climate.

4) How does the current project address racial equity and inclusion? Please provide specific examples.

- The Farmers' Market organics collection provides a free service for residents who do not have the ability to compost at home.
- When performing outreach for the Green Neighborhoods Grant Program, staff plan to ensure consistency with the One Orange Racial Equity Framework. Direct outreach to people of color, immigrant, refugee, and other marginalized communities will include mailings, signs, and connections with neighborhood leaders/points of contact.

Targeted neighborhoods will include:

- Alabama Avenue
- Glosson Circle/Davie Road/Neville Road
- Carr Court
- Lloyd-Broad
- Lincoln Park (Barnes/Prince/King/Queen Streets)
- Rogers Road
- Apartment Neighborhoods – NC Highway 54
- BPW Road

Other targeted outreach will include El Centro/CEL, the Refugee Community Partnership, and the Refugee Support Center. Planning Department staff are working with Communications and Engagement staff to ensure that outreach and engagement strategies are consistent with Inclusive Carrboro. Staff also expect to include the following:

- Reach out to apartment complexes, HOAs, faith-based organizations, non-profits, schools, and the Green Neighborhood interest list (from initial in-person meetings held pre-pandemic) through email.
- Post signs and posters around Town.
- Utilize the Orange County Climate Council, advisory boards, Town social media, Neighborhood Liaisons, Farmers' Market, and neighborhood information centers to help spread information.
- Provide information at Earth Day event at Town Commons
- Advertise in the newspaper and WCHL radio.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

1) What climate change and sustainability goals and objectives have been established for your department?

The Environmental Sustainability Coordinator works to implement both the municipal Energy and Climate Protection Plan (ECPP) and Community Climate Action Plan (CCAP).

- Municipal goal: 80% reduction in 2010 levels of municipal greenhouse gas emissions by 2030
- Community goal: 80% reduction in 2010 levels of per capita greenhouse gas emissions by 2030

2) Describe climate change and sustainability accomplishments to date.

- ICLEI - Cities for Climate Protection Campaign (2001)
- County GHG Emissions Inventory (2005)
- Community GHG Inventory (2011)
- Municipal GHG Inventory (Yearly since 2012)
- Energy and Climate Protection Plan
 - Implementation in progress since 2014
- Updated Community Inventory (2015, 2019)
- Community Climate Action Plan (2017)
 - Implementation in progress since 2017

3) Based on assessment(s), what are the critical factors affecting the department’s ability to address climate change and sustainability, internally and/or externally?

- Implementing the Town’s ambitious climate action goals within the goal timeframe
- Staff time and workload
- A large share of emissions reductions needed to meet these goals are dependent on community action, for which the Town has very little ability to control.

4) How does the requested budget address climate change and sustainability?

The requested budget addresses recommendations in the Energy and Climate Protection Plan (ECPP) and Community Climate Action Plan (CCAP). Examples include:

- Operational costs related to electric vehicle (EV) charging stations.
- Providing grants through the Green Neighborhoods Grant Program
- Outreach/engagement on climate action topics, including food choice, food waste reduction, and energy efficiency.
- Bee City USA and Mayors’ Monarch Pledge participation and pollinator actions
- Participation in sustainability organizations including the Southeast Sustainability Directors’ Network (SSDN), Orange County Climate Council, and Local Governments for Sustainability (ICLEI)
- Administering second Community Climate Action Plan Survey

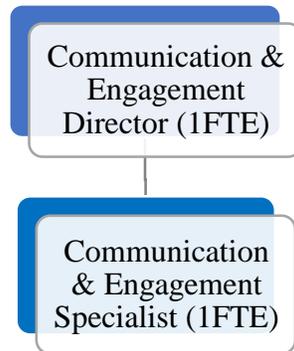
Budget Summary- Climate Action

Department

CLIMATE ACTION	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$195,989	\$201,869
Operating Exp	\$41,263	\$63,556
TOTAL	\$237,252	\$265,424

COMMUNICATION & ENGAGEMENT

2 FTE



PURPOSE

The Communication and Engagement Department works to provide public information, encourage participation, improve trust in local government, and enhance the Carrboro brand and reputation. Through implementation of the Inclusive Carrboro Communications and Community Engagement Plan, it strives to ensure accessible communications to serve our diverse community with new pathways for resident engagement.

GOALS

- To implement the Inclusive Carrboro Communications and Community Engagement Plan.
- To increase public awareness of and participation in Town decisions, programs and services.
- To create opportunities for stakeholders to provide feedback to the Town.
- To create internal systems to standardize and enhance communications.
- To coordinate and standardize emergency communications.

SERVICES PROVIDED & ACTIVITIES

- Manages the Town's communications and engagement platforms.
- Educates public on where to obtain information on Town services and programs.
- Seeks feedback and evaluation on current Town programs and services.
- Ensures culturally appropriate messaging and equitable access to information.
- Manages a permanent communications team.
- Controls overall town communication during emergency situations.
- Assists with efforts to recruit and train residents for service on advisory boards.
- Improves internal communications with Staff.

PREVIOUS YEAR ACCOMPLISHMENTS

- Developed the **Language Access Plan**, working with Building Integrated Communities, a program of the Institute for the Study of the Americas at UNC-Chapel Hill.
- Drafted a revised **Community Biennial Survey** and worked with consultant ETC Institute for dissemination and reporting out of results. This is the second time in which the Town has created a separate survey of residents who live in the Qualified Census Tract.
- Led a successful community engagement process for the **Bolin Creek Greenway** from June to October 2023 using a variety of online tools - a survey, an interactive mapping tool, social media - as well thousands of postcards and flyers, door-to-door literature distributions in select neighborhoods, and outreach at community events with a commitment to engaging a diversity of voices - through translation, interpreters, and paper. At the end of the engagement period, the Town received 1,769 responses to the survey and 644 comments.
- Recognized with **Awards from 3CMA and NC3C** for programs including the Bilingual Town Calendar and Carrboro In Motion.
- Designed, printed and distributed a **Bilingual Wall Calendar** for the Town of Carrboro featuring free community events, as well as service information. Hand-delivered to residents of apartment complexes, this year's distribution was expanded to include Historically Black Neighborhoods of Carrboro.
- Designed unique **Downtown Banners** for monthly rotation to announce seasonal events and observances, following coordination with Duke Energy for design plan approvals.
- Coordinated with partners to market and plan events (including photography and video production) for Libba Cotten Day, Pride Month, Juneteenth, Black History Month, BIPOC Elected Officials Poetry Reading, Freight Train Blues, Braxton Foushee Day, Second Graders Tour of Town Hall and Fire Station, Manley McCauley Marker Unveiling, and Braxton Foushee Street Dedication.
- **Created new websites/webpages** for Poetry in Carrboro, Black History Month, Carrboro Pride, Juneteenth, and Women In Carrboro.
- Completed a second update of Town Branding to introduce **New Marketing Logos for seasonal events such as Black History Month, Bike Month and Hispanic Heritage Month**.
- Partnered with Fleet Feet to provide a **Historic Walking/Running Tour of Downtown Carrboro** to help celebrate their 30th anniversary.
- Organized a total of six **Carrboro In Motion** events in spring and fall. This engagement effort provides Town departments and community partners an opportunity to connect with residents via community block parties. The apartment complexes in our schedule are those where a high percentage of residents have requested emergency housing assistance to avoid evictions.
- Provided **Regular Photography Services** for Recreation, Parks & Cultural Resources programming across many recreational activities.

UPCOMING FISCAL YEAR OBJECTIVES

- Implement the Language Access Plan including identifying vital documents for translation and working with Refugee Community Partnership.
- Support the opening of the 203 Project with communications and website support and outreach, including a grand opening event.
- Develop plan for selecting and installing digital signage using ARPA Funding.
- Create Engagement webpage to centralize a location for engagement activities by various departments and programs.
- Complete Town Style Guide including Inclusive Language Guide as part of an overall Engagement Framework.
- Organize event marketing and coverage through a coordination plan with RCPR
- Create Website Sub-site for Recreation, Parks and Cultural Resources.
- Continue Carrboro in Motion community block parties (emphasis on underserved communities).
- In the event that the Citizens Academy becomes a priority, this program will involve C&E in a high capacity.
- Engagement support for the Downtown Master Plan.
- Increase focus on YouTube Channel including overall video content creation.

PERFORMANCE MEASURES

The Community Survey is conducted biennially. Find results at <https://www.carrboronc.gov/1096/Biennial-Community-Survey-Reports>

	FY2020-21	FY2021-22	FY2022-23	FY2023-24
Meet or exceed the Community Survey results of respondents “satisfied” with availability of information about Town programs and services. (In 2024, question changed from “access” to “availability”)	N/A	68%	N/A	65%
Meet or exceed the Community Survey results of respondents “satisfied” with experience engaging with Town Government process. (In 2024, question changed to “level of public involvement in local decision-making)	N/A	59%	N/A	44.5%
Meet or exceed the Resident Survey results of respondents	N/A	59%	N/A	61%

“satisfied” with Town efforts to inform residents on local issues.				
Town Information Centers	N/A	4	9	9
Email Subscribers to Town News	1,010	1,007	1,057	1,096
Email Subscribers to Carrboro This Week	128	428	614	763
Facebook Followers	4,216	5,500	6,001	6,.6K
Twitter Followers	7,262	7,797	7,715	7,.6K
Instagram Followers	3,053	3,942	4,617	5,839
LinkedIn Followers	N/A	178	387	575
Nextdoor Followers	6,765	7,556	8,134	8,836
YouTube Followers	182	277	387	427

RACIAL EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

The Inclusive Carrboro Communications and Community Engagement Plan aims to increase access to information, resources and civic processes by people of color, immigrant, refugee and other marginalized communities.

The Inclusive Carrboro Communications and Community Engagement Plan promotes multiculturalism and full participation by all residents through:

- Acknowledgement of the barriers that people of color, immigrant, refugee and other marginalized communities experience in accessing Town government or participating in public processes.

- Recognition of diversity as both a strength and opportunity.
- Affirmation that a healthy democracy requires outreach and public engagement that takes into account our communities’ racial, cultural, and socio-economic complexity.

Strategies to improve engagement and inclusivity include:

1. Building upon successful strategies for generalized communications and engagement
2. Connecting with minority communities and building relationships
3. Adopting a grassroots approach
4. Ensuring culturally appropriate messaging and information.

2. Describe racial equity and inclusion accomplishments to date.

- **Language Access Plan** – One of the Town’s core values is to provide equitable access to services and resources to residents who speak limited English. We have a goal to ensure language access is an integral function of all Town programs, services and activities. The Communication and Engagement Department was successful in its grant application in May 2023 to this community planning and leadership initiative that partners with North Carolina local governments to create inclusive practices and policies for residents born in other countries. A staff and community team assembled for the Building Integrated Communities program and worked from May 2023 to April 2024 to develop the Language Access Plan. This plan was adopted by the Town Council in April 2024.
- **Carrboro in Motion Fest/Festival de la Comunidad en Movimiento** – Since launching this event in October 2022, we have held seven Carrboro in Motion block parties and have five additional events planned for spring and fall 2024. As we return to communities, we notice increasing participation and excitement from property managers. Additionally, we are picking up new partners from Orange County who come out to meet residents and offer county services from the Library, Social Services, and Housing. Many residents are beginning to recognize Town staff members and seek them out for questions and ongoing conversations. This event is a great opportunity for Town Departments to connect with residents, especially when they have engagement topics underway. We are grateful for ongoing participation from Planning, Fire-Rescue, Police, RPCR and Housing & Community Services, and Public Works.
- **Bilingual English/Spanish Calendar** – C&E staff created a wall calendar in English/Spanish that highlights free Town events with information about services and ways to connect with departments. C&E Staff joined by departments including Police, Fire-Rescue and Race and Equity – work to hand-deliver the calendars to underserved communities. This year, additional distributions were made in Historically Black Neighborhoods of Carrboro. This calendar won a statewide NC3C Communications Award in April 2023 and again in April 2024.
- **New Seasonal and Values Logos** – The department prepared an update to the Town Brand Guidelines, approved by the Town Council, to include new logos for many events and observances that make our marketing more inclusive and representative of

our community. These include Hispanic Heritage Month, Black History Month, Juneteenth, Pride Month, and others.

- **Downtown Banners** – The department created a suite of banners for Downtown Carrboro that display the Town’s values and backing of seasonal observances such as Black History Month, Pride Month and more. These banners are a highly visible communication method to display our Town values for diversity, equity and inclusion.
- **Town Information Centers** – C&E staff regularly update approx. nine message boards located around Carrboro in order to reach people where they live and play, and to connect in non-digital ways. Google Maps offers opportunities for additional communications including geo-locating our TICs and ensuring that services are easily locatable for cell-phone users.
- **Engagement Webpage** – We are planning to create a landing webpage to centralize the Town’s engagement questions and topics underway. This will make it easier to communicate a central access point where the community can get involved and weigh in on topics. It will also help departments to coordinate their engagement efforts and find opportunities for cross-pollination.
- **YouTube Livestream of Council Meetings** – Our Council meetings now include multilingual closed captioning which may be translated into various languages. This increases equity by keeping Linguistically Isolated Communities informed and allowing them to participate in their native language. We are working to improve our video, livestreaming and other communications to improve the Town’s YouTube channel, which has higher numbers of viewers who are racially and ethnically diverse than other social media platforms.
- **E-newsletters** are issued in a unique manner that drives readers to our website, where Google Translate is easily accessible.
- **Communications Calendar** outlines messaging for religious holidays across cultures and a flag schedule for Black Lives Matter and Pride banners.
- **Related Stories and Updates:** BIPOC Business Roundtables, Immigrant Heritage Month, Carrboro Day including history, Elizabeth Cotten, Historic Truth Plaques, Manly McCauley Historic Marker, Dr. Martin Luther King Jr. Celebration, Racial Equity in Human Services Funding Program, Buy BIPOC in Carrboro, Minority Enterprise Development Week, Frederick Douglass Community Reading (video), PRIDE month events (multimedia).

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?

We use many strategies to engage residents. Most of our activities are community-wide, while others are focused on specific groups in their communities, such as renters or non-English speaking residents. We are more effective when working in partnership with other departments and community partners.

Carrboro in Motion Fest/Festival de la Comunidad en Movimiento – These neighborhood block parties held at apartment complexes are designed to promote regular and effective participation with communities. Residents join neighbors, community, Town employees and elected public officials. These events support the Town’s goals for equitable access and the opportunity for equal input by going where the people are and inviting them to participate in a free, government-sponsored event.

Residents come out for a Zumba class led by Oscar Garcia; a bike fix-it stations where numerous bikes were repaired and biking needs identified; a Chapel Hill Transit bus with route and service info; a mobile health unit from El Centro Hispano; Storytime readings for children from librarians; and a dance performance by Takiri Folclor Latino.

We also intend to use the Carrboro Conversations model for engagement projects that can benefit from this style of engagement. In connection with both Carrboro Conversations and Carrboro in Motion, we intend to develop an official list of neighborhood-based organization contacts in our town. Our goals are to combine outreach to neighborhood organizations with our existing lists of apartment complex managers and community partners to establish a system of outreach across many communities.

The Town of Carrboro strives to create a neighborhood liaisons network in the future. Due to other demands on the department, this has been set as a longer-range priority. While our town has numerous neighborhood associations and HOAs, other communities, such as renters or non-English speaking residents, are seldom included. Not all neighborhoods have the same social capital or organization infrastructure. How can we support neighborhood capacity building? Our goals are for residents to identify and act on neighborhood priorities; to influence Town decisions on plans, policies, procedures, programs, and services; and to increase resident involvement in civic and community life.

4. How does the current project address racial equity and inclusion? Please provide specific examples.

Our current large engagement projects are implementation of the Language Access Plan and continuation of Carrboro in Motion events.

The Language Access Plan (LAP) -- The Town’s Language Access Plan will help provide more equitable services. When someone inquires about government services, they receive adequate language support from the start, no matter what language they speak. While government services are available to everyone, the language barrier can deter individuals from seeking assistance, participating in community offerings and feeling a sense of belonging in the community in which they live. The result is unequal access to government services, with a significant population receiving mediocre services — or none at all. The LAP will help staff understand their roles and responsibilities with respect to overcoming language barriers for Limited English Proficiency (LEP) individuals. The plan is a management document that outlines how the Town has or will define language assistance tasks, set deadlines and priorities, assign responsibility, and allocate the resources necessary to come into or maintain compliance with language access requirements.

Carrboro In Motion -- This spring 2024, we will be taking Carrboro in Motion to Estes Park (March 2 – completed), Collins Crossing (April 27), Berkshire 54 (May 18) and Royal Park (June 8) apartment complexes. These locations were selected to increase Town of Carrboro engagement with underrepresented and low-income communities in Carrboro.

The apartment complexes in our schedule are those where a high percentage of residents have requested emergency housing assistance to avoid evictions. C&E coordinates with Housing & Community Services to identify locations where we can meet the goals of the *Inclusive Carrboro Communications & Community Engagement Plan* “to improve public access to information about the Town and its services, programs and decisions, provide timely communication with stakeholders; engage racial and ethnic minority groups and other vulnerable and underserved populations; advance opportunities for all; assure the Town provides clear and useful information; and enhance transparency of decision-making and outcomes.”

Carrboro is committed to having an equitable public participation system that enfranchises everyone. Communication and Engagement recognizes that there is much work to be done toward achieving this goal.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

1. What climate change and sustainability goals and objectives have been established for your department?

Communication and Engagement strives to adopt Sustainable Marketing practices, as outlined generally below:

- Turn off the printer
Because we are striving to reach residents beyond digital methods, we are planning for more printed flyers and an annual direct-mail postcard.
- Re-think promotional items
We haven't really purchased promotional items yet but intend to be thoughtful about our choices. We are happy to work with other departments to consider standards.
- Ramp up e-marketing
We are very present on all social media platforms and email/text users.
- Reduce, Reuse, Recycle
We use recycled paper products. Our use of banners always considers messaging for reuse from year to year. We use paper lanterns instead of balloons for the Libba Cotten Day and Carrboro In Motion events. Following these events, we aim to reuse them for future events whenever possible.
- Shop local
We always seek out local businesses for our small department's needs.

2. Describe climate change and sustainability accomplishments to date.

Communication and Engagement strives to improve Carrboro residents’ quality of life by promoting practices, services and ideas to protect the environment. Some of the Town stories and initiatives we have promoted include: the Mayor’s Monarch Pledge, Farmers Market, Earth Day, Green Neighborhoods Grant Program, Stormwater initiatives, composting, EV Charging Stations, and Arbor Day. Additionally, we have added “Climate Action Plan” as a drop-down menu item under “Residents” on our new website redesign. Our hope is that this will make it easier to locate for website visitors while putting it in a place of prominence.

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address climate change and sustainability, internally and/or externally?

Green marketing for the Town promotes environmental awareness and protection. As with many Town messages, finding simple key points to share with the public is important. We also want to find compelling ways to tell these stories and to increase their frequency. We can also update, renovate, and re-promote existing content to keep these topics at the public forefront. By creating campaigns and systems for a steady flow of content, we can reduce repetitive work to free employees to be more creative.

4. How does the current project address climate change and sustainability? Please provide specific examples.

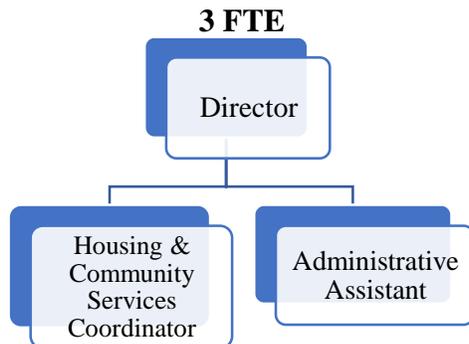
An ongoing project is to create a sustained year-round campaign of messaging to inform and involve the community on Town’s climate action goals. We work closely with the Environmental Sustainability Coordinator to communicate with the public about the initiatives underway to meet our climate action goals and educate residents about actions they can take across these areas.

Budget Summary- Communication & Engagement

Department

COMMUNICATION & ENGAGEMENT	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$213,450	\$219,854
Operating Exp	\$36,902	\$61,000
TOTAL	\$250,352	\$280,854

HOUSING AND COMMUNITY SERVICES



PURPOSE

The Housing and Community Services department works to implement the Town's affordable housing goals and support its commitment to funding community nonprofits who provide human services. In addition, the department works to address the Town Council's strategic priority areas:

GOALS

- To implement the Town's adopted Affordable Housing Goals and Strategies.
- To increase the number of affordable units for both homeownership and rent in Carrboro.
- To preserve/maintain/weatherize the units currently in the affordable housing stock.
- To provide annual funding to nonprofits that deliver community services to Carrboro households.
- To provide well-informed updates to the Town Council about progress toward its goals.
- To center racial equity in its work, policies, and programs.

Addressing Town council's priorities

- Community engagement to inform the project design on town-owned land (dependent upon assessment findings that are conducive to development and Town Council direction).
- Collaborate with nonprofit partners to weatherize and conduct critical repairs on homes owned by low-income households in Carrboro.
- Identify grants to supplement revenue for affordable housing initiatives.
- Continued engagement to increase the number of affordable units for ownership or rent in Carrboro in for-profit and non-profit developments.

SERVICES PROVIDED & ACTIVITIES

- Support the Town's Affordable Housing and Human Services Advisory Commissions.
- Collaborate with community nonprofits and neighboring jurisdictions to achieve Town goals.
- Connect residents to housing and human services resources.
- Manage the Affordable Housing Special Revenue Fund and its application process.
- Manage the Human Services application process.

- Research relevant policy and/or programmatic topics and presents information and recommendations to the Manager’s Office, Commissions, and Town Council as appropriate.

PREVIOUS YEAR ACCOMPLISHMENTS

- Implemented strategy to commit \$2.5M of American Rescue Plan Act funds to support: (1) affordable housing development (~75 units) and acquisition (10 units); (2) eight nonprofits providing critical services to residents most impacted by the pandemic; (3) weatherize at least 25 homes owned by low-income households.
- Closed the \$900,000 Community Development Block Grant – Coronavirus funds for emergency housing assistance to benefit Carrboro residents.
- Managed the awards of special revenue funding to support the creation and preservation of affordable housing and homelessness prevention.
- \$274,000 awarded to 42 community nonprofits to support Human Services in FY23-24.
- Issued RFP for \$1M in ARPA funds to create “transformative” affordable housing.
- Responded to resident housing-related calls and facilitated housing and fire inspections when the situation was warranted.
- Managed the Rogers Road Sewer Connection project.
- Implemented new scoring rubric, centered in racial equity, for the Human Services Advisory Commission
- Completed the initial assessment on town-owned Pathway and Crescent parcels.

UPCOMING FISCAL YEAR OBJECTIVES

- Increase the number of affordable units created and preserved in Carrboro.
- Continue to participate in long-term recovery from the pandemic.
- Develop an updated Affordable Housing Goals and Strategies document, in conjunction with the Comprehensive Plan.
- Finalize a comprehensive tenant information guide and engage nonprofit groups to support tenant education activities.
- Administer community funding through ARPA allocations, as directed by Town Council.
- Continue to foster the preservation of the manufactured home communities and single and multi-family units.
- Continue to conduct a racial equity assessment using the adopted framework of departmental policies, practices, and procedures.
- Work to integrate and emphasize climate action priorities into departmental work.

PERFORMANCE MEASURES

- Progress shown toward 2024 goal of achieving 85 affordable homeownership units and 470 rental units, as specified in the Town’s Affordable Housing Goals and Strategies document.

- Added a performance measure to track progress on the number of Naturally Occurring Affordable Housing (NOAH) units preserved.
- Continued successful implementation of the Affordable Housing Special Revenue Fund to meet housing goals, number of grants allocated, total funding amount.
- Continued successful completion of the Human Services annual application cycle; number of non-profits assisted.

	FY 2021-2022 ACTUAL	FY 2022-2023 ACTUAL	FY 2023-2024 ESTIMATED *	FY 2024-2025 PROJECTED
# Affordable units - homeownership	75	75	75	76
# Affordable units - rental	380	380	390	392
# NOAH units preserved (weatherization and repair)	64	78	80	90
# Affordable housing grants awarded per year	8	4	3	4
\$ Affordable housing funds allocated per year	\$384,664	\$441,740	\$280,332*	\$480,510
# Nonprofits assisted - Human Services per year	50	50	42	45

* Does not include ARPA funded projects or requests.

RACIAL EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

- In addition to affordable housing experience, an understanding of, and commitment to, racial equity and inclusion was prioritized in the hiring of the Housing and Community Services Coordinator in FY24.
- In addition to the required onboarding trainings, staff, and members of the Human Services and Affordable Housing Advisory Commissions, have additional opportunities to continue racial equity learning or training as they arise through the Town’s Department of Race and Equity, GARE, and other resources. For example, staff attended a conference on racial equity in health care systems. Although health care is not a town function, it does fund healthcare nonprofits,

therefore expanding an awareness of the inequities in health care systems is important when evaluating funding applications.

- Racial equity assessments of the human services and affordable housing funding programs completed in FY23. Continue to gather baseline data that tells us who we are serving and where the gaps are. Continue to use results of the assessments to inform possible changes to the funding processes to center racial equity.
- Analyze new strategies and initiatives through a racial equity lens prior to development and implementation.
- Center racial equity in advisory board meetings – Human Services Commission and Affordable Housing Commissions.

2. Describe racial equity and inclusion accomplishments to date.

- Staff and the Human Services and Affordable Housing Advisory Commissions have received racial equity training.
- Racial equity assessments of the human services and affordable housing funding programs were completed in FY23. The department consistently and thoughtfully uses the 7 “pocket questions” in decision making and in its work.
- In FY24, staff created a scoring rubric for the Human Services Advisory Commission which included racial equity criteria.
- The department is currently represented on the GARE Core Team by Malia Summey. Malia is the department’s first contact for constituent services. She often receives calls and emails from residents who are low-income and are facing eviction, having issues with unresponsive or threatening landlords, facing discrimination, or who need financial assistance.

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?

- One critical factor staff will need is historical data on racial inequities, including redlining, in Carrboro. Ideally, partnering jurisdictions will be able to assist in this research.
- Funding and land availability challenges are barriers to substantially increasing affordable housing in Carrboro, particularly for households earning 30% AMI or less. To support housing for extremely low-income households, a higher amount of subsidy is needed.
- The adoption of a Language Access Plan should assist the department in communicating with residents speaking several languages.

4. How do current projects address racial equity and inclusion? Please provide specific examples.

- Funding programs: collect demographic data to see who is being served and identify gaps in service. Inclusion of racial equity questions on the application to assess the level of racial equity work agencies have done. Center racial equity in deliberation discussions and by using a scoring rubric.

- ARPA funding: \$2.5M for nonprofits, repairs and weatherization for low-income homeowners, creation or acquisition of additional affordable housing units. Those most negatively impacted by the COVID pandemic were disproportionately BIPOC; applications will be assessed on several criteria, including whether those who have been most harmed will benefit from the projects.
- Conducting a needs assessment of existing homebuyer education and financial counseling programs, intentionally focusing on barriers to access and participant demographics.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

2. What climate change and sustainability goals and objectives have been established for your department?

- Working toward the Town’s 20-year goal to reduce greenhouse gas emissions by 80% by 2030, our department will:
 - Continue to prioritize affordable housing projects that utilize green building techniques and materials, and weatherization in repair and rehabilitation projects.
 - Encourage flexible work schedules, as permitted, to reduce the number of commutes by automobile.
 - Reduce the amount of department printer and paper use.
 - Reduce energy usage related to heating and cooling in our office area.
 - Town Sustainability staff also plan to work with the department to work to implement several recommendations in the Community Climate Action Plan

3. Describe climate change and sustainability accomplishments to date.

- Sustainability prioritized in the Affordable Housing Special Revenue Fund application:
 - Eligible use:
 - Repair, Rehabilitation, Weatherization & Preservation
 - Specific questions in application: Construction/Rehabilitation Detail.
 - List of Energy Efficiency measures included in the project (if applicable)
 - List of Universal Design principles included in the project (if applicable)
 - Describe the use of energy efficient principles, universal design, and/or materials with extended life span.
- In FY24, supported the repair or rehabilitation and weatherization of 2 homes.
- Active support and participation in the Orange County Home Preservation Coalition.
- Accept electronic submission of Human Services and AHSRF applications only.
- Created a report on the estimated cost of weatherizing homes owned by low-income households in Carrboro.
- Contracted with Rebuilding Together of the Triangle to weatherize at least 25 homes owned by low-income households utilizing \$500,000 of ARPA funds.

4. Based on assessment(s), what are the critical factors affecting the department’s ability to address climate change and sustainability, internally and/or externally?

- Available funds to support affordable housing weatherization and repair projects in the community.
 - Town-wide commitment to allow a hybrid model of public meetings – in-person and virtual. Nonprofit agencies have appreciated virtual public hearings which reduced time spent in the car. Typically, the Town hears from 45-50 applicants every year.
5. **How does the requested budget address climate change and sustainability? Please provide specific examples.**
- Affordable Housing funds to support home weatherization for low-income Carrboro homeowners.
 - Looking ahead - staff time to work with the Environmental Sustainability Coordinator to determine effective reporting criteria and methods to track the climate impact of weatherization and applicable critical repairs and green construction or features in new construction.

Budget Summary- Housing & Community Services

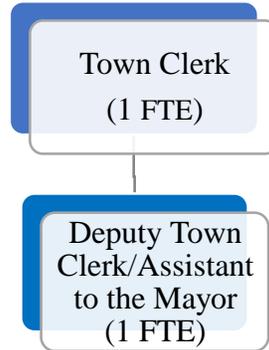
Department

HOUSING & COMMUNITY SERVICES

	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$272,486	\$280,661
Operating Exp	\$359,563	\$354,820
TOTAL	\$632,049	\$635,481

TOWN CLERK

2 FTE



PURPOSE

Prepares Town Council meeting agendas and minutes and make them available to citizens and town staff; maintain official town documents and contracts; prepare and make available updates to the Town Code; receives and manages public record requests; manages advisory board and commission rosters & applications and provides support for the Town Council.

GOALS

Serve the Council and the public by facilitating the production of meeting agendas and minutes in a clear, timely fashion. Maintain and organize official town documents, including resolutions, ordinances, town code amendments, and all town contracts for use by town staff, Council, and the public. Provide multiple public access points for all minutes and agendas, including the use of available technology in storage and retrieval of all town documents. Manage all town advisory boards & commissions rosters, applications, and coordination with staff liaisons for appointments. Work with town staff and town attorney on completion of public record requests in an efficient and timely manner.

SERVICES PROVIDED & ACTIVITIES

Prepares minutes and agendas of Town Council meetings and makes these documents available electronically through the Town's website and stores the documents permanently. Posts video and audio of Town Council meetings to the website. Maintains updated Town Code and posts on the town website. Maintains an accurate record of all resolutions and ordinances approved by the Town Council. Point of contact for town public record requests, work with town staff and town attorney on completion of requests. Maintains record log of all public record requests. Maintains an accurate roster of advisory boards and commissions; facilitates the application and appointment process. Plans the annual advisory board recognition dinner. Research town records upon request. Indexes and stores all Town Contracts and/or agreements. Performs other tasks as assigned by Town Council.

PREVIOUS YEAR ACCOMPLISHMENTS

- Filed 100% of executed Town contracts and agreements.
- Posted 100% of the updates to the Town Code on the Town's website.
- Created and maintained a public record request record log and strengthened the public record request process internally.
- Prepared agendas and minutes for Town Council meetings.
- Timely finalization of resolutions, ordinances and proclamations approved at Town Council and routed to appropriate staff within one week of the meeting.
- Successful maintenance of rosters and application processes of the Town's advisory boards and commissions by coordinating with over 100 members/applicants and staff liaisons.

UPCOMING FISCAL YEAR OBJECTIVES

- To continue electronically indexing contracts and agreements.
- To continue using Granicus agenda management software and expanding capabilities of each.
- Implement new Granicus advisory board management software for easier tracking and application purposes.
- Continuing meeting regularly with advisory board staff liaisons.
- Continue to place emphasis on public record requests and work with departments to complete in a timely fashion.
- Continue evaluation of department policies, practices and procedures using Racial Equity tools.
- Re-launch of Carrboro Citizens Academy

TOWN COUNCIL PRIORITIES

- Continue evaluation of department policies, practices and procedures using Racial Equity tools.
- Council Procedures Manual adoption- aid Council on updates leading up to adoption.
- Continue to work with Council as needed regarding Manager/Clerk evaluation process.

OBJECTIVES

- Index and store all Town contracts and/or agreements.
- Prepare minutes and make available on the website.
- Increase the number of scanned contracts.
- Increase the number of electronically indexed contracts.
- Continue Granicus agenda, meeting, and minute management software.

PERFORMANCE MEASURES

	FY22 Actual	FY23 Actual	FY24 Actual <i>(estimated at 5/30/24)</i>	FY25 Projected
# Of Town Contracts (or agreements) on file with the Town Clerk	2180	2600	2900	3200
# Of Council Minutes Prepared by Town Clerk’s Office	37	25	25	30
# Employee Hours Spent Electronically Indexing Contracts	40	30	30	30
Average Employee Hours Per Set of Council Minutes Prepared	2.0	2.5	2.5	2.5
# Of Public Record Requests Received & Completed	n/a	45	40	45
Average # of Hours spent by Clerk per Public Record Request Received.	n/a	2.5	2.5	2.5
Average # of Hours spent Monthly re: Advisory Boards related tasks & correspondences	n/a	10 - 12	10 - 12	10 - 12

RACIAL EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

The Department continues to apply racial equity and inclusion techniques in every aspect of our work related to correspondences with town staff, Town Council, and the public. Since the Clerk’s office is inward & outward facing with Town staff and the public, a specific example is that the Clerk’s office fairly and equitably returns all voicemails and emails using the same informative response formats for everyone, and not selectively explaining an option to one specific person that may not be offered to another, because of their race, ethnicity, sexuality, or gender. This includes interpersonal communication and digital communication means. The department strives to treat everyone with respect professionally and personally.

2. Describe racial equity and inclusion accomplishments to date.

The Department has used the racial equity assessment lens tool to evaluate the advisory boards and commissions recruitment and appointment policy. Further, racial equity pocket questions have been utilized for agenda items. The Town Clerk continues to adhere by the Advisory Board Recruitment Policy regarding bringing diverse applicant pools forward to Council for appointments, and only does so when diverse applicant pools are achieved, unless quorum issues exist. The Town Clerk and Deputy Clerk have both attended GARE DRE training webinar offered early this year. The Town Clerk also completed the self-guided training offered by GARE upon their hire in 2022. The Town Clerk is a member of the Town’s CORE team and assists in reviewing Racial Equity Lens submitted by other Town departments.

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?

Based on heavy workloads, standing meetings and meeting agenda preparations, the department would otherwise be able to evaluate the department policies and procedures using the Racial Equity Lens tool more efficiently. Due to these heavy workloads, it potentially prohibits the department from determining possible inequities that might exist once evaluating these policies and programs.

4. How do current projects address racial equity and inclusion? Please provide specific examples.

Current departmental projects will address race and equity as projects will be subject to the lens evaluations and/or pocket questions will need to be applied to check for any potential inequities.

STRATEGIC ENERGY & CLIMATE PROTECTION PLAN

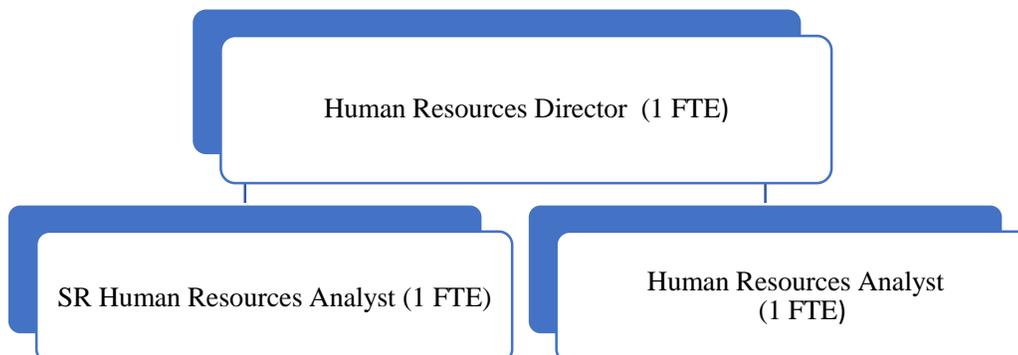
The Department continues to reduce use of paper and waste by using electronic methods for the bulk of the work to include email usage, digitally signed contracts, electronic indexing, online application submittals for advisory boards, use of the Granicus system for agenda materials, posting the large agenda packets online (often 75-100+ pages for each meeting). The Department will continue these methods during the next budget year and strive to keep digital records and department website up to date to ensure citizens can access information easily and reduce the need for printing.

Budget Summary- Town Clerk

Department	FY 2024 Adopted	FY 2025 Adopted
TOWN CLERK		
Personnel Exp	\$144,212	\$148,744
Operating Exp	\$22,572	\$28,830
TOTAL	\$166,784	\$177,574

HUMAN RESOURCES

3 FTE



PURPOSE

Partner with town leadership to recruit, hire, develop, and retain a highly qualified, diverse staff dedicated to delivering exemplary customer service and to creating an atmosphere of positive employee relations that focuses on the health and well-being of all employees.

GOALS

- Work with Town Manager and Management Team to maintain a fair, respectful, and effective work environment through Organizational Development work and initiatives, training, and communication.
- Research, review, and recommend competitive and cost-effective benefits.
- Research and review pay and position classification policies and programs that support the Councils' goals for competitive, living wages that also provide employees with the Orange County Living wage.
- Implement wellbeing program and safety program for employees in keeping with the Councils' goal of enhancing quality of life for everyone.
- Provide a fair and equitable process for attracting applicants and retaining employees who have the education and experience commensurate with position requirements.

SERVICES PROVIDED & ACTIVITIES

- Provides organizational development assistance to Town Manager and Management Team.
- Advertises vacant positions, receives employment applications, assists departments with interview process, background checks, and verifies employment eligibility (E-Verify).
- Conducts new employee orientations, including benefits enrollment sessions and surveys.
- Administers town-provided and voluntary benefits, including counseling all employees on benefits plans and options.
- Coordinates administration of DOT substance abuse testing, FMLA, ADA accommodations, EAP, and COBRA.

- Counsels’ supervisors and employees on performance issues and keeps supervisors abreast of legislative changes and guidelines that affect personnel administration; assists departments with personnel and employee relations issues.
- Maintains confidential personnel files in accordance with the General Statutes and completes reports according to state and federal regulations.

PREVIOUS YEAR ACCOMPLISHMENTS

- Conducted new employee orientation sessions, benefits enrollment seminars, and sponsored key employee development opportunities.
- Held employee appreciation events and recognized service milestones.
- Kicked off and overseeing first comprehensive organizational staffing study.
- Provided direct communication to each employee on benefits deductions.
- Conducted several organization-wide safety trainings including fire drills and active shooter training.
- Provided onsite wellness opportunities including biometric screenings.

UPCOMING FISCAL YEAR OBJECTIVES

- Complete organizational staffing study and implement recommendations as budget allows.
- Provide training and development for department directors and supervisors that will enhance their leadership, operations management, and employee development skills.
- Continue to track diversity of applicant pools and determine if diverse applicant pools affect the diversity of employee population.

PERFORMANCE MEASURES

	FY 2021-22 ACTUAL	FY2022-23 ACTUAL	FY2023-24 PROJECTED	FY2024-25 PROJECTED
Positions Filled	59	65	74	TBD
Employee Appreciation Events and Rewards	4	4	8	8
Orientations, and other Information Sessions	28	30	30	30
Wellness Events	3	3	3	4
Individual Wellness Sessions, Referrals, Interventions	10	24	10	12

New Policies/Procedures/ Programs Revised or Developed	3	5	1	5
HR Staff - Trainings	4	5	5	5

RACIAL EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

- HR met its goal of increasing BIPOC applicants by 10% last year. This year we will evaluate the data and see how it affected the demographic make up of our employee population.
 - Work with hiring managers to establish best practices and procedures for advertising open positions.
 - Identify and address any barriers to application process that could be impacting potential BIPOC applicants.
- Embed racial equity and inclusion best practices and lessons learned from GARE trainings into employee events and gatherings.
- Provide training to supervisors and employees that aligns with GARE initiative.
- Propose and implement staffing changes that support racial equity and inclusion in concert with the organizational staffing study.

2. Describe racial equity and inclusion accomplishments to date.

- Brainstormed with hiring managers to find alternate ways to advertise open positions in an attempt to reach a broader applicant pool.
- Completed Racial Equity Assessment Lens for Facility Security Policy.
- Participated in Continuing the Conversation series, as available.

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?

- Retention of employees.
- Current labor market.
- Employee buy-in to racial equity and inclusion initiatives.
- Reconciling federal employment law and best practices from GARE.

4. How does current/future departmental projects address race and equity?

- Retention strategies are being reviewed to ensure the town has a diverse workforce.
- Increased security features for the Town’s buildings will be supported by a policy that has been reviewed by the REAL.
- The Chief Race and Equity Officer is a member of the project team for the organization staffing study.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

1. What climate change and sustainability goals and objectives have been established for your department?

- Move paper-based processes to online, paperless processes.
- Reduce waste at employee events.

2. Describe climate change and sustainability accomplishments to date.

- The Flexible Work Policy continues to save over 100,000 miles/year in commuting miles and more than 500,000 over the next five years.

3. Based on assessment(s), what are the critical factors affecting the department's ability to address climate change and sustainability, internally and/or externally?

- Current onboarding process is primarily paper based. Until a new HRIS is in place, the paper-based process is the only available option.
- Most Town employees live outside Carrboro limits and must commute to and from work.

4. How does the requested budget address climate change and sustainability?

- HR is working with IT to purchase and implement a new ATS that will reduce paper-based processes.
- HR's budget request includes funds for employee events; to address climate change and sustainability, HR will actively seek ways to use those funds to reduce waste at those events.
- HR's budget request also includes funds for employee wellness initiatives. These can incorporate topics that also relate to sustainability.

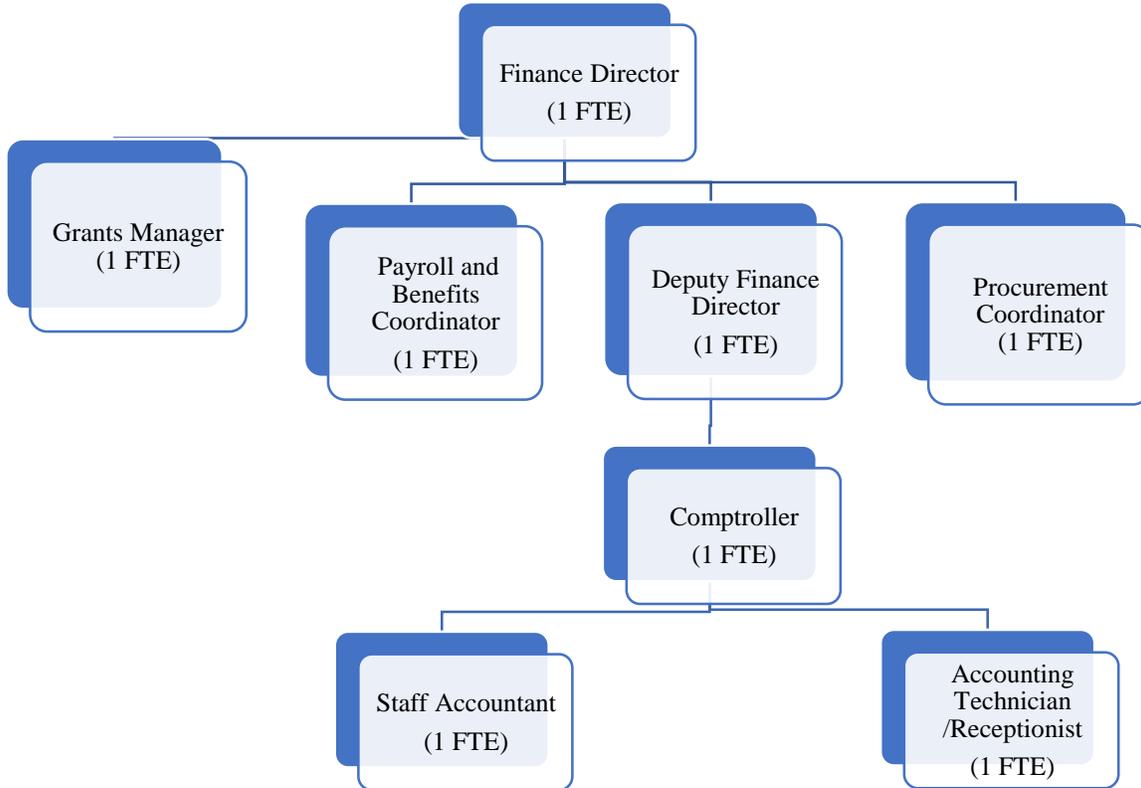
Budget Summary- Human Resources

Department

	FY 2024 Adopted	FY 2025 Adopted
HUMAN RESOURCES		
Personnel Exp	\$634,075	\$653,097
Operating Exp	\$102,490	\$108,710
TOTAL	\$736,565	\$761,807

FINANCE

8 FTE



PURPOSE

To provide financial management support for the delivery of town-wide services through the administration of financial, budget, payroll, accounts payables, billing and collections, and project development through best business practices.

SERVICES PROVIDED & ACTIVITIES

- Coordinate the annual independent audit and Comprehensive Annual Financial Report.
- Coordinate development of operating and capital budgets.
- Provide financial reporting as required by state and federal law.
- Process payroll and accounts payables.
- General billing for Retiree Health Insurance.
- Manage cash and investments to ensure sufficient cash is available to pay current obligations and that idle cash is invested in accordance with state law.
- Issue purchase orders for goods and services, solicit bids, manage procurement card program and service contracts.
- Manage risk and insurance program, including claims management, general liability, police, and public officials, and auto/property liability.

GOALS

- To Strengthen financial accountability throughout the organization.
- To process and record all transactions accurately and timely.
- To ensure financial information is available to decision-makers regularly.
- To enhance operational effectiveness, cost savings, and efficiency by leveraging technology.

PREVIOUS YEAR ACCOMPLISHMENTS

- Completed successful audit for year ending June 30, 2023.
- Hired new Finance Director, Comptroller, and Grants Manager.

RACE AND EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

- The Finance Department is committed to equitable sourcing practices for finance needs in selecting vendors to serve the town including consulting, audit, and technology needs.
- The Finance Department is committed to continued clear messaging in various channels to allow for community feedback, transparency, and inclusion.
- Seek to increase accessibility and interpretability in financial results and financial forecasting, including summary documents and regular, public reporting on the town's financial situation.
- Staff is committed to continuing education and training opportunities related to race and equity, and members serve actively on town committees to promote equity and equitable practices.
 - Describe racial equity and inclusion accomplishments to date.
 - Work with Race and Equity team to develop programming related to race and equity, ensuring financial accountability and scoring of proposals to ensure maximum allocated funding reaches equitable goals.
 - Leading partner to facilitate the distribution of funds from the Carrboro Family Financial Assistance program supported with ARPA funding
 - Finance staff has completed self-paced GARE training (or has timelines to complete) and implemented practices learned in daily decisions including vendor selection, communication channels, and general inclusion measures.
 - Utilizes various channels to distribute public financial documents including online via the town website and paper copies available at multiple town locations.
 - Incorporated race and equity narratives including goals and accomplishments for all the town departments as part of the annual budgeting process.

2. **Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?**
 - Transparency and interpretability remain goals to promote financial transparency and education.
 - Increased community involvement and engagement are necessary to continue the growth of the Finance Department in relation to race and equity, and the departmental goals center around this objective.
 - A primary goal of the department is to produce timely and accurate financial documents; another primary goal should be devoting time to interpreting the meaning of the financial results and forecasts to residents and stakeholders, especially those without a financial background.
 - The Finance Department serves and facilitates other departmental goals and initiatives, provide guardrails for statutory compliance and ensuring best practices. Continued decision-making with racial equity considerations is necessary.
3. **How does the requested budget address racial equity and inclusion? Please provide specific examples.**
 - The Finance Department budget does not include many specific examples to address race and equity, but a race and equity lens is applied to all vendor selection and narrative is provided to all agenda items presented to Town Council.
 - Indirectly, the Finance Department supports race and equity initiatives by other departments and prioritizes efforts to align with Council objectives.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

1. What climate change and sustainability goals and objectives have been established for your department?

Finance uniquely supports all Town departments in promoting their programming initiatives. While prioritizing pillars created by Council, the Finance department aids not only the discussion of Energy and Climate initiatives, but also works programming into departmental budgets to support this pillar.

Specifically, the Finance department strives to contribute to the energy and climate action initiatives by:

- Ensuring set points on thermostats throughout Town Hall are reasonable, while ensuring comfort of staff and visitors.
- Utilizing online and digital platforms for required financial documents and financial education opportunities for town residents and stakeholders.
- Establishing controls and accountability for physically printed materials from the printer located in the Finance department.
- Turning off lights around the department and within Town Hall that are not being utilized regularly.
- In FY 2025, the Finance department wants to ween away from physical checks and provide payment to vendors via ACH or credit card, when possible.

2. Describe climate change and sustainability accomplishments to date.

The Finance department operates on a hybrid work policy that allows for staff to complete work responsibilities remotely without adding to the carbon footprint of commuting on a daily basis. Additionally, the Finance department has made all required documents available online for reporting purposes and public viewing. The department prioritizes initiatives presented by all town staff in development of the annual budget, and allows unassigned, discretionary funding for unidentified climate action initiative that surface between budget cycles.

3. Based on assessment(s), what are the critical factors affecting the department's ability to address climate change and sustainability, internally and/or externally? .

Indirectly, the Finance department supports all Town initiatives related to climate change prevention and sustainability efforts. Directly, the department utilizes best practices for climate consideration, including digital opportunities for financial publications, utilizing hybrid vehicles when staff attends training and professional development, and monitoring technology and equipment to ensure decreased reliance on the energy grid at Town Hall and other Town facilities. A hurdle for a departmental goal of fiscal transparency and accessibility is sole reliance on digital platforms, as some within the community are not able to access this channel. The department resolves to continuously monitor the climate landscape and ensure the department is following town pillars to mitigate forces of climate change in daily practices performed.

4. How does the requested budget address climate change and sustainability? Please provide specific examples.

The Finance department budget is primarily based on personnel. Operationally, the budget seeks to reinforce goals of the town to combat climate change and use sustainable practices in daily operations. Finance recognizes the need for increased funding to the newly created department within the town and is ready to support additional programming as opportunities arise. The department is also recommending the role of Grant Manager to include non-ARPA grant potentials to ensure maximum reach of town resources in the coming fiscal year.

UPCOMING FISCAL YEAR ACTIVITIES

- Continue financing the 203 South Greensboro Street Project.
- Continue to provide training for departments on the use of MUNIS financial system.
- Implementation of Munis Cashiering.
- Continue to identify strategies for streamlining administrative processes.
- Review and update policies and procedures.
- Coordinate annual audit and prepare Comprehensive Annual Financial Report.
- File all required financial reports with state and/or federal agencies in timely manner.
- Increase use of EFTs with vendors.

TOWN COUNCIL PRIORITIES

The Finance Department supports all departments in their effort to meet Town Council priorities & objectives.

OBJECTIVES

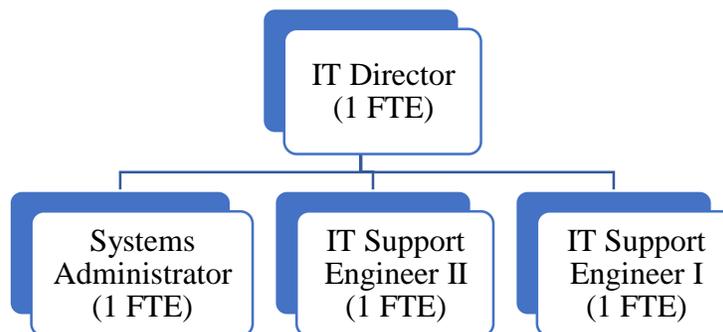
1. Process and record all transactions accurately and in a timely manner.
2. Ensure the new credit card machine is operating and accessible to stakeholders.
3. Utilize technology to ensure best business practices are effective and efficient.
4. Ensure Town's internal control system safeguards the Town's assets.
5. Report monthly financial reports to Town Council.
6. Ensure all grant and project ordinances are approved by the Town Council.
7. Ensure all transactions are completed and posted by the 5th working day of each month.
8. Monitor the Town's revenues and expenditures for compliance with the annual budget ordinance.
9. Develop annual operating and multi-year budgets by June 30.
10. Complete annual independent audit and prepare Comprehensive Annual Financial Report.

Budget Summary- Finance

Department	FY 2024 Adopted	FY 2025 Adopted
FINANCE		
Personnel Exp	\$724,331	\$746,061
Operating Exp	\$600,746	\$617,719
Total	\$1,325,077	\$1,363,780

INFORMATION TECHNOLOGY

4 FTE



PURPOSE

To deliver technology-based solutions that are cost-effective and increase the efficiency and quality of many Town services. To work with various external and community organizations, as directed by the Town Manager, to discover mutually beneficial relationships, sharing technology infrastructure, resources and strengths.

GOALS

- To provide the technology to enhance the delivery of Town services and to increase the access to and the quality of vital government data.
- To align technology to business processes throughout Town government.
- To expand business continuity through the application of technology, secure systems and infrastructure redundancy.
- To work with county, municipal, educational and other agencies to share, cooperatively build and leverage existing infrastructure.
- To apply various technologies that enable staff, citizens and others to decrease their carbon footprint while working for the Town or interacting with the Town.

COUNCIL'S STRATEGIC PRIORITIES

- IT supports all departments in their efforts to fulfill the Council's Goals and Strategic Priorities. IT, as directed by the Town Manager, partners with local community organizations and other regional governmental bodies to leverage and share the Town's existing technology and technological knowledge to assist the underserved or unserved in the community.

SERVICES PROVIDED & ACTIVITIES

- Create a Town wide Information Technology Budget and facilitate long term planning through the Capital Improvements Program.
- Provide technology support services to all departments through helpdesk activities, education, upgrades, patching and maintain a replacement cycle for aging technology.
- Facilitate the collection, storage, security and integrity of electronic data while ensuring appropriate access.

- Maintain reliable historical data backups for discrete data loss incidents and catastrophic events.
- Provide technology purchasing expertise to all departments.

PREVIOUS YEAR ACCOMPLISHMENTS

- Implemented comprehensive cybersecurity refresh and core network switches replacement.
- Continued technology related assistance with the 203 Project.
- Implemented multiple on premises applications, SaaS applications, software module additions and hardware across organization. Implementation of building security system.

UPCOMING FISCAL YEAR OBJECTIVES

- Continue technology related assistance with the 203 Project – install/configure and implement all technology in the 203 Building. Includes comprehensive network update.

PERFORMANCE MEASURES

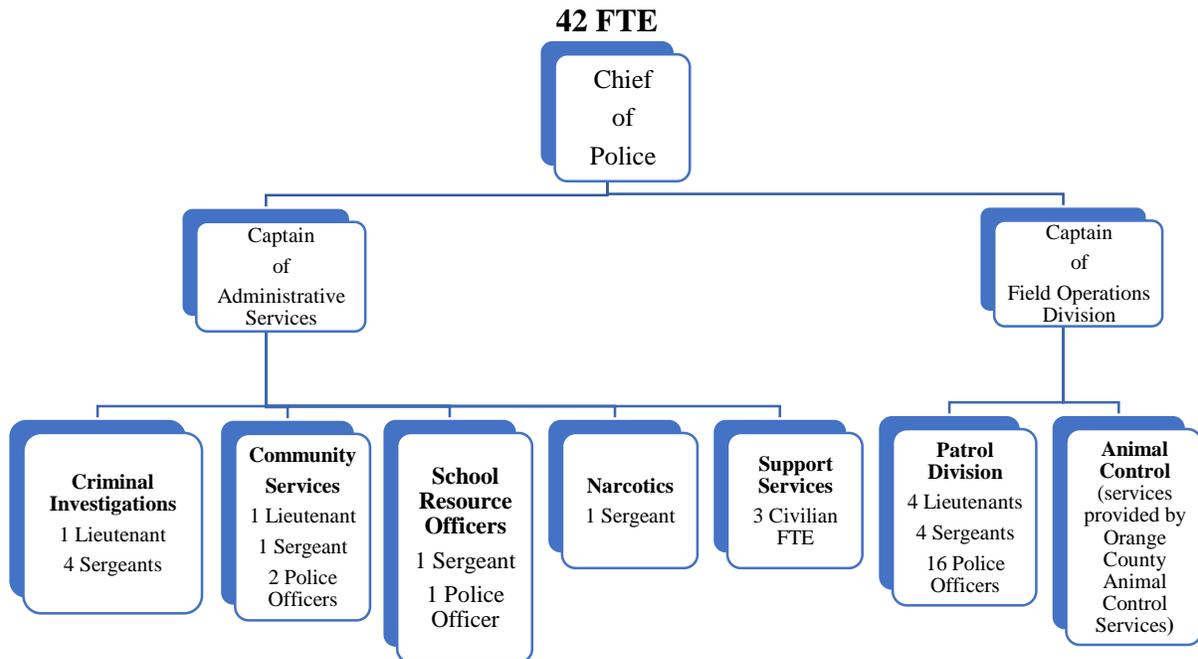
	FY2021-22 ACTUAL	FY2022-23 ACTUAL	FY2023-24 ESTIMATED	FY2024-25 PROJECTED
# of Workstations, Laptops, iPads Supported	203	217	224	237
# of Emergency Services Mobile Terminals Supported	52	50	50	52
Average Hours per Month of Unplanned Application Downtime During Business Hours	<1	<1	<1	<1
# Unsuccessful Backups per Month	0	0	0	0

Budget Summary- Information Technology

Department

	FY 2024 Adopted	FY 2025 Adopted
INFORMATION TECHNOLOGY		
Personnel Exp	\$454,114	\$467,737
Operating Exp	\$1,583,296	\$1,927,600
TOTAL	\$2,037,410	\$2,395,337

POLICE DEPARTMENT



PURPOSE

The Police Department maintains public safety and contributes to improving the quality of life through the enforcement of criminal and traffic laws. Police Department personnel utilize and maximize all available resources, technological advances, and educational opportunities to provide professional police services.

GOALS

- Ensure Carrboro will continue to be a safe community for all residents, business owners/operators, and guests.
- Monitor and address traffic and pedestrian safety issues.
- Meet mandated training requirements.
- Recruit, hire, and retain diverse officers.
- Develop and retain personnel who effectively deal with emergency, crisis, and/or complex situations and handle routine duties carefully and professionally.
- Train and develop employees for advancement and/or for expanding job responsibilities.
- Increase our efforts in Community Policing.
- Continue to use social media to inform and involve the community.

SERVICES PROVIDED & ACTIVITIES

- The Uniform Patrol Division provides 24-hour service and emergency response; effectively answers and initiates calls for service; conducts preliminary criminal investigations and initiates arrests; provides necessary traffic control and enforcement; investigates traffic accidents; and provides basic business/residential security checks.

- The Criminal Investigations Division investigates major criminal cases and offenses involving juveniles, sexual assault, and domestic violence; processes crime scenes; coordinates efforts with relevant area authorities and service providers; maintains the evidence/ property room; conducts prospective employee background investigations; and provides on-call service.
- The Community Services Division provides law enforcement and other community-related services; partners with the community to meet specific neighborhood-driven requests for assistance; follows-up on complaints of suspected gang-related activity; initiates narcotics investigations; provides School Resource Officers at McDougle Middle and Carrboro High Schools and works with other schools to enhance safety and security; provides general crime prevention and community watch services; works with business owners to enhance safety and security; and provides other community outreach activities.
- The Administrative Division provides direct service to walk-in visitors, email requests, and telephone inquiries; maintains incident reports and multiple departmental records (including but not limited to warrants, monthly FBI and SBI data reporting, etc.); administers Department budget; answers requests for statistics and analysis; ensures that Department personnel receive appropriate training and adhere to the Department's, Federal, and State policies and procedures; and provides support services to Board of Aldermen, Town staff and other agencies.

PREVIOUS YEAR ACCOMPLISHMENTS

- Met all state mandated training goals.
- Continued to increase outreach activities.
- Partnered with local law enforcement agencies, NC SBI, US Marshals, US Drug Enforcement Agency, and US Alcohol, Tobacco and Firearms during narcotics investigations thus reducing the number of drug houses and street-level drug sales locations.
- Continued directed patrols, pedestrian safety monitoring, and speed enforcement campaigns involving Uniform Patrol Division and Community Services Division.
- All officers completed GARE in-service training.
- Participated in activities to address pedestrian and bicycle safety.
- Maintained service levels amid continuing staffing shortages – hired four officers, one trainee, one social worker, and one data analyst during fiscal year.

UPCOMING FISCAL YEAR OBJECTIVES

- Continue to increase community outreach programs.
- Maintain current fuel consumption.
- Meet mandated training goals.
- Maintain Carrboro's safety for residents, business owners/operators and visitors.
- Increase the number of directed patrols and speed enforcement campaigns involving Uniform Patrol Division personnel.
- Increase pedestrian safety operations.
- Reduce the number of traffic accidents.
- Continue management/leadership training for supervisors.
- Reduce visible drug sales and locations.

- Continue to fill vacant positions and plan for succession.
- Continue partnership with Public Works and Recreation and Parks staff to provide a safe setting for all special events.
- Continue to integrate grant funded Social Worker position to department and requested another position.
- Increase social media usage.

COUNCIL PRIORITIES

- Connectivity, Bicycle, Pedestrian

OBJECTIVES

- Maintain Carrboro’s safety for residents.
- Reduce number of traffic accidents.
- Continue pedestrian safety operations.
- Continue bicycle safety operations.
- Maintain Carrboro’s safety for residents by reducing open-air drug market.
- Maintain Community Service outreach.

PERFORMANCE MEASURES

COUNCIL PRIORITIES	OBJECTIVES	PERFORMANCE MEASURES	FY 2021-22 ACTUAL	FY 2022-23 ACTUAL	FY2023-24 ESTIMATED	FY 2024-25 PROJECTED
		Workload:				
	Maintain Carrboro’s Safety for residents	Calls for Service	16190	16424	17500 (+6%)	18112 (+10.27%)
	Reduce number of Traffic Accidents	Motor Vehicle Accidents	407	409	382 (-6.6%)	416 (+1.7%)
	Maintain Carrboro’s Safety for residents	Criminal Arrests	388	442	420 (-5%)	473 (+7%)
		Efficiency:				
	Increase Pedestrian Safety Operations	Pedestrian Crossing Citations Issued	2	4	1 (-75%)	2 (-50%)
	Increase Bicycle Safety Operations	Bicycle Traffic Operations	0	0	0	0
		Effectiveness:				

	Walkable Community	Pedestrian Safety Operations	0	0	0	0
	Maintain Carrboro's Safety for residents by reducing open air drug market	Narcotics Arrests	25	46	48 (+4.3%)	52 (+13%)
	Increase Community Service Outreach	Community Events Involvement	24	36	35 (-2.7%)	38 (+5.5%)
		Productivity:				
	Walkable Community	Pedestrian Safety Operations	100% Decrease	0% Change	0	0
	Increase Pedestrian Safety Operations	Pedestrian Crossing Citations Issued	0% Change	200% Change	+50% Change	0% Change
	Enhance Quality of Life	Bicycle Traffic Operations	100% Decrease 100% Decrease	0 0% Change	0 0% Change	0% Change

RACIAL EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

For years, the department has attempted to recruit a diverse staff of officers along racial, ethnic, and gender lines. We have long realized that sometimes if we wish to hire a diverse staff, we need to look at applicants a bit longer and take a holistic picture of them.

Specific examples of goals established are as follows:

1. Increase the applicant pool in overall numbers and areas of diversity (race, sex, ethnicity, etc.).
2. Identify and utilize more avenues for recruitment – both traditional and non-traditional options.
3. Increase minority, female, and overall applicant pool.
4. Increase the number of minority and female officers.

5. The community services division attends numerous job fairs through out the year to including Community Colleges and Orange County Sponsored Job Fairs.
6. Explore adding job vacancy announcements to the following websites.
 - a. National Association of Women Law Enforcement Executives (NAWLEE)
 - b. National Association of Black Law Enforcement Executives (NOBLE)
 - c. National Latino Law Enforcement Organization (NLLE)
 - d. Asian American Law Enforcement Association (AALEA)
 - e. National Native American Law Enforcement Association (NNALEA)
 - f. International Association of Chiefs of Police (IACP)

Each of these goals will be re-evaluated and assessed to ensure we are taking every possible step regarding equity and inclusion.

2. Describe racial equity and inclusion accomplishments to date.

From a training perspective, our police department has been a pioneer in our town, consistently providing training on minority and other issues. We have equipped our officers with the knowledge and tools necessary to deliver fair and impartial service to all individuals we encounter in our work. Our partnerships with internal and external resources have further enhanced our ability to provide professional services to our diverse population.

From a community partnership perspective, we have actively engaged with various groups to understand the problems and issues that impact our service population. This collaborative approach has allowed us to better serve our community and address their unique needs.

1. Since approximately 2004, there has been an annual in-service training that specifically addresses juvenile and minority situations encountered in law enforcement and gives officers tools and perspectives to bridge communication gaps. This is mandatory training, and all officers must stay up to date to maintain their certification.
2. Began Fair and Impartial Policing Training in 2015 and have two in-house officers certified as instructors. When the Town of Carrboro took over GARE training, the PD stopped Fair and Impartial Policing. All new hires are required to complete GARE.
3. Discrimination is specifically and strictly prohibited in CPD Personnel Policy. Policies 32.0 and 33.0
4. Traffic Stop Policy attempts to reduce disparity in the impact of regulatory and equipment stops.
5. Policy created for suspicious conditions/people pushes back on biased reporting to police.

6. Hiring shifted from only certified officers to non-certified (we hire them to send them to training) several years ago. This gives us the ability to consider a broader range of applicants.
7. Department has a long history of participation in diversion and other programs to divert people from the criminal justice system, both before and after offending – Teen Court, Orange County Pre-Arrest Diversion (OC PAD), Street Outreach, Harm Reduction (SOHRAD), recently added diversion social worker who is part of the CCDR team which is a county comprehensive initiative to divert individuals from the Criminal Justice System.
8. First law enforcement agency in NC to reverse an opioid overdose – started carrying naloxone in 2014 – serving people where they are.
9. Crisis Intervention Training (CIT) is our officers' normal and expected certification.
10. We recently hired a new crime analyst who is compiling data for quarterly reports to be presented to Town Council members. This data will include Traffic Stops, Use of Force, Diversion and Deflection, and Citizen Complaints on Officers (including a generalized description of the outcome).

3. What are the critical factors affecting the department's ability to address racial equity and inclusion, internally and/or externally?

The biggest issue we face as we try to address racial equity in hiring and retaining officers is financial and lack of filled positions. Over the years we have made an intentional and dedicated effort to recruit officers to this department and it has generally been successful until the past few years. The problem is that many new officers don't stay and leave for opportunities in other departments that either pay higher salaries or officers want to work for a town or county that better represents their own demographic. Much of what drives officers leaving is pay – both starting and future progression. With the recent steep decline in folks interested in law enforcement as a career, this has only been exacerbated. The police department has reviewed its hiring practices to remove barriers to hiring and continues to explore ways to increase hiring.

This has been made very difficult due to the fact that we have so many open positions. The backbone of any agency is patrol. In order to fill the gaps in the patrol division we have had to take personnel from CID and Community Services. Community Services typically has five positions. For several years they have been operation with just two. This has directly and significantly impacted our ability to fully implement our goals as it relates to recruitment effort. This, in turn, severely hinders our ability to properly address racial equity and inclusion, externally. In addition, Community Services is the division within the police department that does most of the department's outreach to community

members and organizations. This outreach has been reduced in recent years due to the persistent staffing problems.

4. How does the current project address racial equity and inclusion? Please provide specific examples.

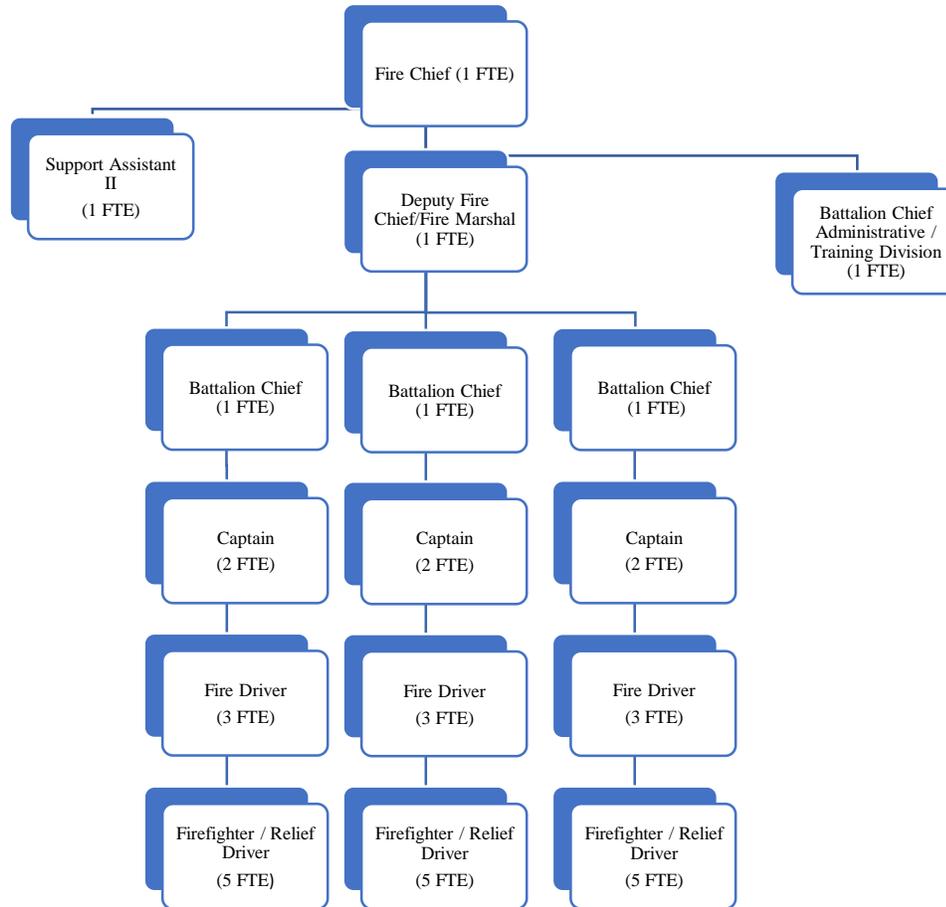
As described above, the police department has put forth goals and initiatives that address racial equity and inclusion internally and externally, from creating new policies and guidelines and performing as much outreach as possible to other jurisdictions and within areas that address individuals of all age groups and backgrounds. We have provided years of training addressing racial equity to every officer yearly to better serve everyone within the Town of Carrboro. We have created and submitted a retention, recruitment, and recovery plan that addresses racial equity and inclusion to former town manager Richard White. We intend to reevaluate the plan and follow up with new Town Manager Patrice Toney.

Budget Summary- Police Department

Department	FY 2024 Adopted	FY 2025 Adopted
POLICE		
Personnel Exp	\$4,013,527	\$3,859,930
Operating Exp	\$289,494	\$574,209
Total	\$4,303,021	\$4,434,139

FIRE AND RESCUE DEPARTMENT

37 FTE



PURPOSE

The Carrboro Fire-Rescue Department is dedicated to protecting the lives, property, and the community from the destructive effects of all hazards by providing community risk reduction and emergency response services.

GOAL

- Ensure that those that live, work, and visit Carrboro are safe by providing fire suppression, rescue, and emergency services that are consistent with industry best practices and exceeds the communities' expectations.
- Ensure that Carrboro is a resilient community and is prepared for all types of disasters and emergencies.
- Provide a comprehensive Community Risk Reduction program to reduce risk to the community.
- Increase recruitment and retention efforts to ensure personnel are energetic, well-trained, and diverse.

COUNCIL STRATEGIC PRIORITIES

The Fire-Rescue Department will work to implement priorities identified in the Carrboro Connects comprehensive plan.

- Provide all hazards response in accordance with industry best practices.
- To provide community risk reduction services to foster an environment of awareness and collaboration in which risks are proactively reduced making our community safer.
- Identify the most common causes of personal injury and property damage locally and regionally to implement public education strategies to reduce risks due to identified causes.
- Provide comprehensive training to all personnel to maximize operational capabilities.
- Creation of a succession plan to prepare personnel for advancement as opportunities arise, and to assist with personnel retention.

SERVICES PROVIDED & ACTIVITIES

- Provide 24-hour all hazards response: fire suppression, rescue, and emergency medical services.
- Conduct fire investigations to determine the cause and origin of fires.
- Provide community risk reduction programs: code enforcement, plan review, fire prevention education, CPR and First Aid classes, Child Safety Seat program, and smoke alarm installations.

PREVIOUS YEAR ACCOMPLISHMENTS

- Took delivery and placed in service a new fire engine. This new engine was the culmination of years of work and hundreds of hours of effort by department personnel.
- Continued a restructuring process for the department to increase efficiency and effectiveness of personnel.
- Implemented a new system for tracking fire alarm systems, fire sprinkler systems, and other fire and life safety systems to maintain the operational capabilities of the systems.
- Met all state and local training requirements.
- All personnel completed diversity, equity, and inclusion training.

UPCOMING FISCAL YEAR OBJECTIVES

- Continue to provide 24-hour all hazard response in accordance with industry best practices.
- Perform a community risk analysis to identify hazards and implement community risk reduction interventions to address identified risks.
- Quarterly and annually review incident and community risk reduction data to ensure services are provided in accordance with industry standards and best practices.
- Complete implementation of the new records management system to ease in collecting and analyzing data.
- Complete Racial Equity Assessment Lenses for policies, practices, and procedures as outlined in town and departmental race and equity plans.
- Ensure all personnel meet applicable annual training requirements.
- Implement a program for tracking of fire alarm systems, fire sprinkler systems, and other fire and life safety systems to maintain the operational capabilities of the systems.

- Ensure that 100% of life safety violations are documented and repaired within 90 days.

PERFORMANCE MEASURES

	FY2021-22 ACTUAL	FY2022-23 ACTUAL	FY2023-24 ESTIMATED	FY 2024-25 PROJECTED
Incident Response Metrics				
Total Responses	1,761	1,955	1,926	1,881
Fire & EMS Responses - Town	1,361	1,445	1,539	1,448
Fire & EMS Responses - County	246	240	253	246
90% of calls within Town limits will have a TOTAL response time of 6:30 or less*	06:59	07:27	07:21	7:15
90% of calls within the SO District will have a TOTAL response time of 10:00 or less*	10:25	10:45	10:20	10:28
Community Risk Reduction Metrics				
Fire Inspections	782	782	1040	1,000
100% of life safety violations repaired and documented w/in 90 days	100%	100%	100%	100%
Smoke/CO Alarm Installation/Inspections	472	482	393	449
Community Risk Reduction Contacts	1,344	1,465	1,552	1,453
Training Metrics				
100% of FRD personnel will meet annual NC RRS training requirements	100%	100%	100%	100%
100% of FRD personnel will meet annual Emergency Medical Technician training requirements	100%	100%	100%	100%
100% of FRD personnel will meet annual safety training requirements.	100%	100%	100%	100%

- Note: Total Response time includes call processing time, which is handled by the Orange County Emergency Communications Center.

RACIAL EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

The Fire-Rescue Department (FRD) is dedicated to improving racial equity in the department and the Town. The FRD has internal and external race and equity objectives. Internally, the FRD strives to be more equitable and inclusive for current personnel. The department set an objective to have a departmental race and equity team. This team will work to further the department and the Town's race, equity, and inclusion goals. The team also allows regular interaction with shift personnel, enabling more effective communication regarding potential disparities. Another objective is the regular evaluation of promotional processes to ensure equity. The FRD is also improving recruitment efforts to diversify the applicant pool for hiring processes. Externally, the FRD is working to ensure that the Community Risk Reduction (CRR) programs offered by the department are available to marginalized and underserved groups. Marginalized and underserved groups within the community are often unaware of the various programs offered, meaning those for which the programs would be most beneficial are not currently aware of the programs. In short, the FRD is working to reach all community members proactively.

2. Describe racial equity and inclusion accomplishments to date.

One of the most notable accomplishments of the FRD is the partnership with Chapel Hill High School's (CHHS) Fire Academy and the Chapel Hill Fire Department to implement a summer camp for high school females, Camp Ignite – Chapel Hill. The FRD in FY24 and planning for the third year in FY25 is underway. To date, approximately 65% of camp attendees have been minorities. The FRD has been more actively involved in regular programming with the CHHS Fire Academy. Approximately 50% of students enrolled in the program are minorities. Students regularly interact with FRD personnel, visit the stations to learn more about the fire service, and train with department personnel. The FRD has also implemented revised recruitment efforts, emphasizing the diversification of the applicant pool. The department continued advertising with local groups such as the local chapter of the NAACP, El Centro, the Refugee Community Partnership, and national organizations. The FRD plans to continue partnering with these organizations and others to further the department's recruitment efforts. Lastly, the FRD has begun to target marginalized and underserved groups with CRR programs. The department recently partnered with El Centro and SafeKids Orange County to provide child passenger safety inspections at three events. These events were held at locations that would allow participants with a lack of trust in government officials to feel more comfortable. Each event had at least one native Spanish-speaking child passenger safety technician from the FRD to help participants feel more relaxed and ensure the participants understood the training. A bilingual child passenger safety technician from the department assisted with the events. Lastly, the FRD reinstated a ride-along program for community members interested in a career in the fire service. 60% of program participants this FY have been minorities.

3. What are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?

The most significant obstacle to addressing internal racial equity is that the fire service has historically lacked diversity even more than other local government departments. The FRD is working to improve and hopes to continue the progress made thus far. Also, the FRD has not actively sought engagement from marginalized or racial minority groups. The FRD plans to focus on engagement and feedback from these groups to guide CRR and recruitment strategies moving forward.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

1. What climate change and sustainability goals and objectives have been established for your department?

The Fire-Rescue Department (FRD) is actively working to combat climate change and increase sustainability. The department has implemented several objectives to further this effort. The first objective is to replace gas-powered equipment with battery-powered equipment when possible. Another objective for the FRD is to replace older scene lighting with more energy-efficient alternatives, including battery-powered options. The FRD is also working to reduce apparatus emissions. Current efforts include reducing idle time, replacing older halogen lighting, and minimizing non-emergent apparatus utilization.

2. Describe climate change and sustainability accomplishments to date.

The most significant accomplishment for the FRD is replacing a fire engine. The new engine was placed into service in September 2023. The new fire engine replaced an engine that is over 20 years old. The new engine has a diesel particulate filter system, unlike the older engine. The new engine has energy-efficient lighting and additional battery-powered tools instead of the gas-powered ones on the older engine. The new engine does not have a diesel generator, which was made possible by improvements in energy efficiency. Another significant accomplishment is the replacement of gas-powered equipment with battery-powered alternatives. The FRD replaced a set of hydraulic tools with a battery-powered alternative. The FRD replaced all front-line gas-powered positive-pressure ventilation fans with battery-powered options. The FRD continued the replacement of gas-powered saws and other equipment in FY24 and has included funds in the budget request to replace even more tools in FY25. Lastly, the FRD has worked to limit per- and polyfluorinated substances (PFAS) and other forever chemicals in our operations. The FRD switched to PFAS-free foam and is working with local and state agencies to dispose of foam containing PFAS per applicable regulations. The FRD implemented a new firefighter protective gear standard so that protective gear does not include PFAS.

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address climate change and sustainability, internally and/or externally?

The most significant factor affecting the FRD's ability to address climate change has been the availability of more sustainable options. Until recently, battery-powered equipment was not a viable alternative for most fire, rescue, and emergency services applications. Now that there are more sustainable options, the difficulty is replacement costs. The FRD and the Town have made significant investments in the equipment, and the replacements are frequently even more expensive. Additionally, PFAS-free foam and firefighter protective gear were not readily available or an effective alternative. Also, while fire apparatus is becoming more efficient, hybrid and electric fire apparatus are not yet a viable alternative for the department. The FRD will continue researching options to improve sustainability and combat climate change throughout the department.

4. How does the current project address climate change and sustainability? Please provide specific examples.

The requested budget includes several items to utilize strategic energy and protect the climate. Funds were requested to continue working on the objectives listed, including purchasing additional energy-efficient and sustainable tools and equipment, additional firefighter protective gear, and firefighting foam that does not contain PFAS or other chemicals. Capital improvement items included in the budget request should help the town reach climate and sustainability goals.

Budget Summary- Fire & Rescue Department

Department

FIRE DEPARTMENT	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$3,051,493	\$3,143,038
Operating Exp	\$300,659	\$361,744
TOTAL	\$3,352,152	\$3,504,782

Budget Summary-Fire & Rescue Divisions

Department

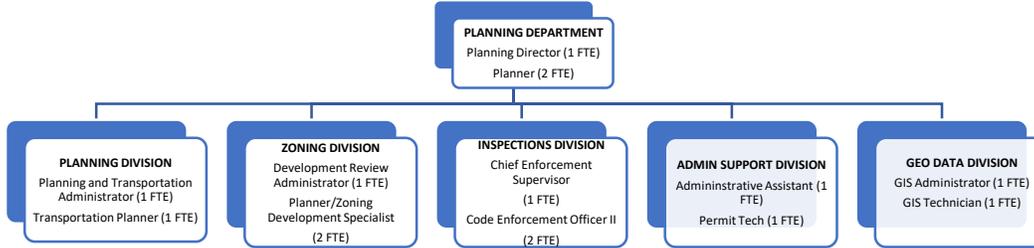
FIRE SUPERVISION	FY 2023 Adopted	FY 2025 Adopted
Personnel Exp	\$406,773	\$418,976
Operating Exp	\$49,801	\$50,874
TOTAL	\$456,574	\$469,850

Department

FIRE SUPPRESSION	FY 2023 Adopted	FY 2025 Adopted
Personnel Exp	\$2,644,720	\$2,724,062
Operating Exp	\$250,858	\$310,870
TOTAL	\$2,895,578	\$3,034,932

PLANNING DEPARTMENT

15 FTE



***Modified Org Chart anticipated with requested additions to staff. With Climate Action staff, budgeted separately in 422 and integrated in all Planning Divisions for supervision and support functions, representing a sixth functional division.**

PURPOSE/GOALS

The Planning Department helps the Town define and carry out its vision for sustaining existing and future populations, monitoring the availability and use of resources needed to maintain a balance of the built and natural environments and

- To support implementation of adopted plans, including Carrboro Connects, Town of Carrboro 2022-2042 Comprehensive Plan.
- To coordinate development of a well-balanced public infrastructure, including green infrastructure, to improve safety, walkability, and travel choices.
- To advance development that is context-sensitive, compact, energy-considerate, and ecologically appropriate, therefore promoting trust, mutual respect, and well-being.
- To excel in GIS technology and other means of access to Town information and services.
- To advance social justice so that race does not predict outcomes in service provision.
- To recognize a special responsibility for the needs of the disadvantaged and to promote racial, ethnic, and economic integration.
- To promote excellence in design that incorporates the diverse range and cultures of community members in the built environment.

SERVICES and PROGRAM ACTIVITIES

- Direct services including Short- and Long-Range Land Use Planning and Development Management, Engineering, Minimum Housing, Multi-trade inspections, Intergovernmental Relations
- Geographic Information Services and support to all Town departments, Transportation, and Environmental Sustainability/Climate Action Plan implementation
- Staff support for Town Council and advisory boards and commissions.

KEY PRIORITIES/ASSOCIATED DELIVERABLES

Staff retention, recruitment, and fulfillment	Reduced turnover, productivity, engagement and advancement – Biweekly staff meetings, Retreats and updated Mission/Vision/Values
Land Use Ordinance & Economic Development	Launch of Land Use Ordinance Rewrite; advancement of Economic Sustainability and Land Use strategies from Carrboro Connects
Environment: Stormwater and infrastructure improvements and environmental protection and tree canopy	See Land Use Ordinance Rewrite and Climate Action (ORG 422)
Implement Race Equity Initiative Race equity initiatives Accessible Language Plan	Completed lens and pocket questions Accessible and Inclusive engagement
Multi-Modal: Multi-Modal Connectivity and Bolin Creek Greenway	S. Greensboro Sidewalk, Morgan Creek Greenway, Phase 1, Jones Creek Greenway. See also Capital Projects

PREVIOUS YEAR ACCOMPLISHMENTS

- Bi-weekly Racial Equity work sessions to complete REALS and CORE Team staff participation.
- Procurement of Downtown Area Plan Professional Services and project launch
- Text amendments, coordination and reporting on implementation of Comprehensive Plan, Carrboro Connects 2022-2042
- Greene Tract Master Plan Administration in partnership with Orange County and Chapel Hill
- Restart of S. Greensboro Sidewalk Design with water line replacement; approval of bike lane extension on Smith Level
- Buffered bike lane added to north side of Jones Ferry Road
- Energov system improvements including streamlined permit and inspection data collection, transition of PZI applications, and new Active Projects Report
- Plan for Land Use Ordinance rewrite/renewal.

UPCOMING FISCAL YEAR OBJECTIVES

- Support and advance projects associated with Key Council Priorities.
- Coordinate completion of bicycle, pedestrian, and greenway design processes for Capital and ARPA-funded projects
- Coordinate downtown master planning process towards completion in spring 2025.

- Launch Land Use Ordinance rewrite and second area/corridor plan.
- Grant project management – Safe Routes to School Action Plan update.
- Seek and administer outside funding for infrastructure/services to leverage local funds.

PERFORMANCE MEASURES

	FY 2024	FY 2025
The amount of land protected for natural resources per capita.	401.61ac = 821.5sf/person (or 0.02ac/person)	+ Jade Creek, Newbury+1307 W. Main
The amount of land available for commercial, business, and mixed-use development.	462.98ac	+ 1
Number of BIPOC and low-income residents involved in transportation decision-making (Council and Advisory).	5	
The number of trades permits issued in no more than five business days	125	175

RACIAL EQUITY ASSESSMENT

1. What and equity goals and performance measures have been established for your department?

- Achieve social justice where race does not predict outcomes, including participation in all aspects of the operation of planning, zoning, inspections, and transportation in Town governance.
- Expand choice and opportunity for all persons, recognizing a special responsibility for the needs of the disadvantaged and to promote racial, ethnic, and economic integration.
 - Complete REALS as specified in Racial Equity Action Plan
 - Engage the lived experience of community members of color who have been underrepresented in meetings, committees, and other actions. Document demographic information (voluntarily provided) for participants at all outreach and engagement activities organized by PZICAT staff.
- Promote excellence in design that incorporates the diverse range and cultures of community members in the built environment.

2. Describe race and equity accomplishments to date.

- Participation in staff CORE team; six staff members have served to this point. Two in CORE cohort training and one in ‘train-the-trainer’ program.
- Greene Tract RFQ development with partner staff from Orange County and Chapel Hill to highlight and shape engagement that gives primary focus to the interests of historic Rogers Road residents.

- c. Staff RE analysis of policies, practices, and procedures actively underway since Fall 2022 in weekly meetings- Racial Equity Pocket question completion since March 2023 for applicable agenda items.
- d. Racial Equity – underpinning of Carrboro Connects: Comprehensive Plan in all aspects – e.g., scoping and developing process, community engagement, structure of the plan, and prioritization of implementation actions, including/not limited to:
 - i. Selection of task force members.
 - ii. Development of direct contact notice for communication about plan, process, and meetings/hearings.
 - iii. Mailed notice to historically Black neighborhoods of public meetings.
 - iv. Posters announcing public meetings placed in historically Black neighborhoods.
 - v. Direct engagement with community leaders serving BIPOC residents with meeting flyers available in Spanish and English – review of plan elements.
 - vi. Carrboro Connects logo and tagline created in English, Spanish, and Burmese.
 - vii. Provision of Spanish translators at community meetings
 - viii. Engagement sessions via YouTube Live with El Centro and Refugee Community Partnership in Spanish and Karen/Burmese languages
- e. Targeted recruiting for open staff positions to HBCUs, community colleges, professional associations, list serves.
- f. Training: Advancing Racial Equity: The Role of Government
 - i. Planning Director on trainer/leader team
 - ii. Employees completed virtual/live training in 2021.
 - iii. Carrboro Connects task force and board and commission members trained in 2021.
 - iv. Employees completed virtual/self-paced training in 2022.
- g. Training: Decision-making for Racial Equity – All staff hired as of January 30 participated in training offered in January 2023.
- h. Continuing the Conversation Sessions for employees – planning subcommittee
- i. All CIP projects evaluated based on answers to racial equity questions.
- j. Town Practices, Procedures and Policies Document created and maintained. Development of initial crosstab of Strategic Priorities with PPP to frame Carrboro Connects implementation.
- k. Interactive Map of data layers relevant to race, equity, economics, housing, travel behavior.
- l. Race & Equity focus of Transportation Demand Management (TDM), efforts, emphasis on reinvest neighborhoods.
- m. Green Neighborhoods Grant Program; actions benefitting LMI residents.
- n. Service on Countywide Subcommittee developing Accountability and Evaluation Recommendations for One Orange Racial Equity Plan
- o. Attended the 2021 Annual GARE Meeting – “Democracy for All: Governing for Racial Equity”

3. **What are the critical factors affecting the department's ability to address racial equity and inclusion, internally and/or externally?**
 - a. Workload, staff shortages, turnover, hiring new staff, training are critical factors affecting all service delivery for PZI. Equity evaluations require significant time for research, discussions, and writing to complete.
 - b. Limited availability of uniform, town-wide training /continuing education to ensure similar language and emphasized shared learning experiences by staff and advisory board members.
 - c. Limitations on granularity of data documenting disparities.
 - d. Methods of documenting race and ethnicity of participants in engagement opportunities rely on voluntary self-identification.
 - e. Detailed guides and training resources are limited in availability. Learning /practice curve that results in additional time spent in earlier steps and for employees as they start preparing evaluations.
4. **How does the current project address racial equity and inclusion? Please provide specific examples (new initiatives).**
 - a. Key findings in Carrboro Connects include actions that address race and equity related to homes, environmental justice, transportation, and the economy.
 - b. Greene Tract Master Plan workshops are utilizing a multi-language translation approach to flyers and interpreters will be involved at meetings and workshops.
 - c. Scoping for Downtown Area Plan has identified the need for materials and the final plan documents to be readily translatable to ensure that language is not a barrier to participation or understanding.
 - d. Staff are scoping Accessibility Transition and Title VI plans to ensure that physical spaces, information, and language access meets state and federal requirements.

STRATEGIC ENERGY AND CLIMATE PROTECTION

1. **What climate change and sustainability goals and objectives have been established for your department?**
 - See Energy and Climate Protection and Community Climate Action Plans for project and programmatic goals and objectives to reduce greenhouse gas emissions and improve environmental resilience.
 - See Carrboro Connects, Town Council 13 Priorities, ARPA lists and other CIP/workplan projects, revisions to regulations, standards and processes that will be the focus of work in FY2024.
2. **Describe climate change and sustainability accomplishments to date (see 422 for expanded report)**
 - ICLEI - Cities for Climate Protection Campaign (2001)
 - Fare-free bus as 14 percent partner in Chapel Hill Transit (2002)
 - County GHG Emissions Inventory (2005)
 - Bicycle-Friendly Community since 2009
 - Stream buffer and floodplain/resilience amendments (2007-present)

- Community GHG Inventory (2011)
 - Municipal GHG Inventory (Yearly since 2012)
 - Energy and Climate Protection Plan (Implementation in progress since 2014; updated goals in 2020)
 - Updated Community Inventory (2015, 2019)
 - Conditional and Conditional Use Zoning Districts, especially B-1(g) and M-3 CU/C (2015 and 2017)
 - Community Climate Action Plan (Implementation in progress since 2017; updated goals in 2020)
 - Land Use Ordinance text amendments to define clearly permitting requirements and therefore assist/streamline installations of energy producing arrays (2017)
 - Sol Smart Bronze designation (2017) for leadership in supporting alternative energy in Carrboro.
 - Sol Smart Gold designation (2018) for additional actions.
 - Establishment of Stormwater Utility (2018)
 - Updated Tree Cover Requirements (2019)
 - EV Charging Requirements (2021)
 - Expansion of environmental staffing – new Environmental Planner in FY 22.
- 3. Based on assessment(s), what are the critical factors affecting the department’s ability to address climate change and sustainability, internally and/or externally?**
- Ambitious reduction goal and short timeline
 - Limited staff who are not committed to day-to-day service delivery.
 - Limited time to devote to conceptually and practically training staff and integrating service improvements related to addressing climate change and sustainability throughout all service delivery categories and actions.
 - A large share of emissions reductions needed to meet these goals are dependent on community action; Town’s ability to establish requirements that affect behaviors is extremely limited.
 - Base data are limited, though the Town has some experience in activities and projects that can serve as models.
- 4. How does the requested budget address climate change and sustainability? Please provide specific examples.**
- Efficiency and service delivery – staffing support and levels are critical to speed and timeliness of permit approvals and inspections, requests for information, preparation of reports and all related activities that can lead to improvements in processes and/or regulations to support and incentivize climate change and sustainability actions. Limitations in staffing can lengthen turnaround time for all activities: prevent self-assessments of efficiency/identification of streamlining improvements, in an uncertain economy, delays can cause applicants to modify or abandon projects, which could include choosing less efficient, but more expensive options, and which could otherwise result in increases to the Town’s tax base.

Delays can also cause applicants to proceed without permit approvals, which can lead to safety issues, additional costs.

- Land use amendments – map and text amendments identified in Carrboro Connects or resulting from proposed Downtown Master Plan/Jones Ferry corridor, rewriting the Land Use Ordinance, and other area/corridor plans.
- Transportation projects that provide for mode choice and substitute for vehicle trips, including bike plan implementation.
 - Construction of multi-use paths on Morgan Creek and Jones Creek.
 - Construction of a sidewalk on S. Greensboro Street
 - Bicycle infrastructure on S. Greensboro Street, Shelton, Street, Maple Avenue Extension. Expanded bicycle infrastructure on Jones Ferry Road and N. Greensboro Street.
 - Pedestrian safety infrastructure in numerous locations – N. Greensboro Street, Hillsborough Road, Jones Ferry Road, Homestead Road.
 - Departmental Vehicle purchases to be informed by outcome of Fleet Study.
- Continued funding for transit service, which is returning to more normal, pre-COVID pandemic levels.
- Traffic calming infrastructure and speed safety digital signs.
- Outreach events related to TDM, bicycling, pedestrian safety, transportation choices:
 - Celebrate Biking in May with partners (TOCH, bike shops, bike advocacy groups, and others!)
 - Open Streets
 - Transportation Demand Management (TDM) grant – increased funding
 - Safe Routes to Schools – grant for consultant assistance to update Action Plan; Bike and Walk to School
- Leadership in Energy and Environmental Design:
 - Comprehensive Plan: Green Stormwater, Climate Action and Environment, Recreation, Parks, and Cultural Resources, Transportation and Mobility, and Land Use Chapters, specifically. Linkages in all.
 - Cross-cutting themes and plan foundation of Climate Action
 - 203 Project – LEED Gold Equivalent design
 - Continued permit expediting for solar/review of process for opportunities to streamline/improve.

Budget Summary- Planning Department

Department	FY 2024 Adopted	FY 2025 Adopted
PLANNING DEPARTMENT		
Personnel Exp	\$1,460,482	\$1,504,296
Operating Exp	\$267,862	\$735,895
TOTAL	\$1,728,344	\$2,240,191

Budget Summary- Planning Divisions

Department	FY 2024 Adopted	FY 2025 Adopted
PLANNING SUPERVISION		
Personnel Exp	\$770,851	\$793,977
Operating Exp	\$243,064	\$699,211
TOTAL	\$1,013,915	\$1,493,188

Department	FY 2024 Adopted	FY 2025 Adopted
PLANNING ZONING		
Personnel Exp	\$378,628	\$389,987
Operating Exp	\$8,189	\$15,522
TOTAL	\$386,817	\$405,509

Department	FY 2024 Adopted	FY 2025 Adopted
PLANNING INSPECTIONS		
Personnel Exp	\$311,003	\$320,333
Operating Exp	\$16,609	\$21,162
TOTAL	\$327,612	\$341,495

TRANSPORTATION

PURPOSE

The Transportation Cost Center is used to account for expenditures associated with the partnership with the Town of Chapel Hill and the University of North Carolina for the provision of public transportation services throughout the Chapel Hill, Carrboro, and UNC community.

GOALS

- Improve quality of public transportation service.
- Improve level of public transportation service.
- Improve access to public transportation.
- Improve communication and feedback opportunities for Carrboro residents using and/or needing public transportation services.

SERVICES PROVIDED & ACTIVITIES

- Fixed route, fare-free, transit encompasses all regular bus service to Carrboro residents.
- EZ Rider is a special demand-response service using lift-equipped vehicles to transport individuals with mobility limitations that prevent them from using regular fixed route buses.
- Tar Heel Express is a special service for UNC home basketball and football games.
- Bike-on-bus allows transit riders to put their bicycle on the front of any bus.

PREVIOUS YEAR ACCOMPLISHMENTS

Update of Orange County Transit Plan with funding allocations for local service and expansion, including Bus-Rapid Transit

Chapel Hill Transit overall:

- Service area of approximately 62 square miles.
- Statistics for calendar year 2022 are provided in the table below.

Service Consumption FY2022	Fixed Route	Demand Response
Annual Passenger Miles	5,923,829	215,329
Annual Unlinked Trips	3,372,578	50,814
Average Weekday Unlinked Trips*	12,721	
Average Saturday Unlinked Trips*	2,073	
Average Sunday Unlinked Trips*	2,096	
Service Supplied	Fixed Route	Demand Response
Annual Vehicle Revenue Miles	1,567,493	279,721

Annual Vehicle Revenue Hours	124,032	23,727
Vehicles Operated in Maximum Service	74	14
Vehicles Available for Maximum Service	112	—

Source: National Transit Database, FY2022

*Fixed Route and Demand Response combined for average daily unlinked trips

- In FY 2022 the total system ridership has increased following significant reductions during the COVID-19 pandemic.
- Most recent surveying, completed in 2018, found that 89% of riders surveyed rate the overall quality of Chapel Hill Transit as either excellent or good.

PERFORMANCE MEASURES

	FY 2019-20 ACTUAL	FY 2020-2021 ACTUAL	FY 2021-2022 ACTUAL	FY2022-2023 ACTUAL	FY2023-2024 ESTIMATED	FY2023-2024 PROJECTED
Average Daily Ridership (Boarding)	3,650	937	1600	3000	3000	3000
Average Daily Ridership (Alighting)	3,390	861	1600	3000	3000	3000
Cost Per Hour Fixed Route Service					\$\$	\$\$
Households within ½ mile of transit per Carrboro Connects					7288 address points (HHs)	
GHG Per Hour of Fixed Route Service					MTCOE	MTCOE
Transit service options per neighborhood					Subdivisions/neighborhoods with access to (w/in 0.5mi) at least <u>one</u> fixed transit route: 170 of 242	172

*Linear forecast based on actual data. Have requested updates from CHT.

UPCOMING FISCAL YEAR OBJECTIVES

- Work with Chapel Hill Transit to more effectively manage current level of public transportation service.

- Continue to upgrade and replace, as needed, existing transit shelters, especially shelters in Carrboro (significant delays related to ordering/supply chain matters).
- Work with Chapel Hill Transit to extend service into areas of Carrboro that are currently not served by fixed route service or to provide expanded service on weekends as described in the Chapel Hill Transit Short Range Transit Plan; work on expanding language access to ensure clear communication with all users.
- Management /structure improvements that will result in clear communication, roles/expectations, and effective decision making to ensure transit service assists communities in meeting and exceeding needs and expectations of users for transportation choices, mobility, access, and environmental sustainability.

Not proposed for budget narrative – provided here for comparison/reference.

- Statistics for fiscal year 2020 are provided in the table below.

Service Consumption FY2020	Fixed Route	Demand Response
Annual Passenger Miles	8,206,034	258,824
Annual Unlinked Trips	4,713,325	57,676
Average Weekday Unlinked Trips*	18,657	
Average Saturday Unlinked Trips*	1,810	
Average Sunday Unlinked Trips*	1,026	
Service Supplied	Fixed Route	Demand Response
Annual Vehicle Revenue Miles	1,786,378	281,019
Annual Vehicle Revenue Hours	154,763	25,496
Vehicles Operated in Maximum Service	88	15
Vehicles Available for Maximum Service	95	20

Source: National Transit Database, FY2020

*Fixed Route and Demand Response combined for average daily unlinked trips

Budget Summary-Transportation

Department

TRANSPORTATION

Operating Exp

TOTAL

**FY 2024
Adopted**

\$2,085,317

\$2,085,317

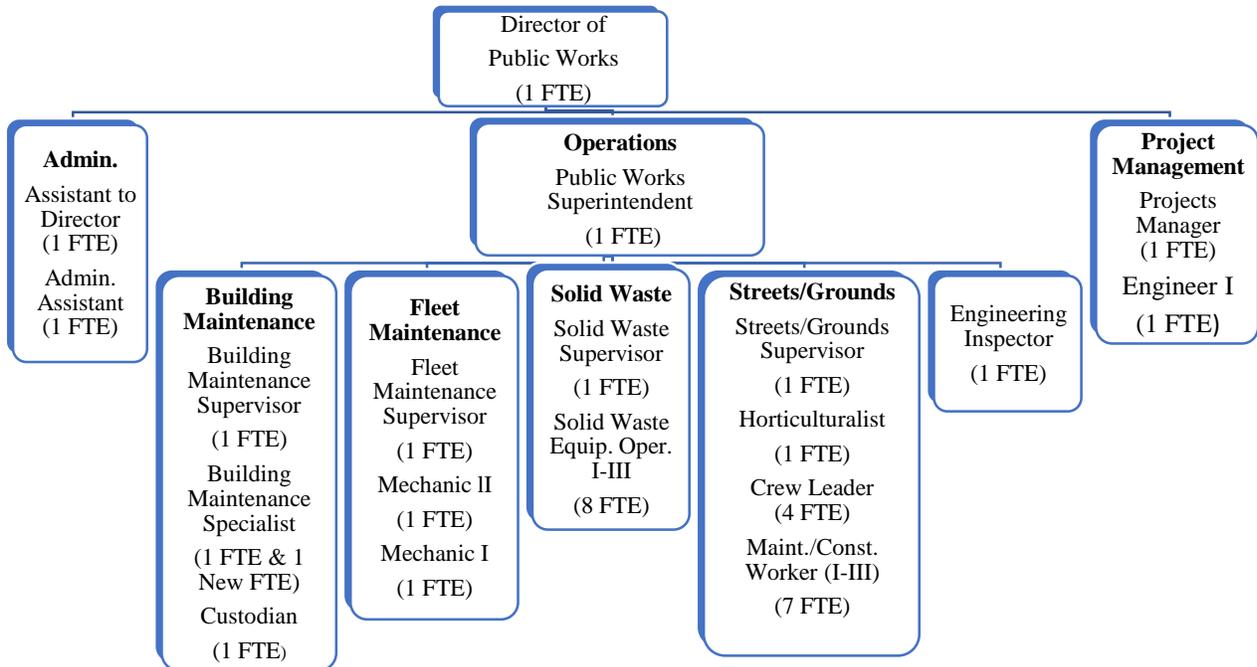
**FY 2025
Adopted**

\$2,366,281

\$2,366,281

PUBLIC WORKS

36 FTE



PURPOSE/GOALS

Promote a safe and healthy pleasing environment and community for residents and public through ever progressing projects, programs, and services.

Public Works goals include:

- Administer construction projects within budget and on schedule.
- Provide timely, cost-effective maintenance of public street systems including signage, storm drainage system, greenways, and right-of-way; Town's motor vehicles and equipment; and solid waste collection and disposal services.
- Maintain public buildings and grounds in an environmentally friendly manner.
- To achieve, and exceed where possible, climate and equity performance standards established by the Town.

COUNCIL PRIORITIES

- Staff retention, recruitment, and fulfillment.
- Environment: Stormwater and infrastructure improvements and environmental protection and tree-canopy.
- Race and Equity Initiatives: Implement race equity initiatives and the accessible language plan.
- Multi-Modal: Multi-Modal Connectivity and Bolin Creek Greenway.

SERVICE AND PROGRAM ACTIVITIES

- Provide construction administration for Town projects, construction monitoring, and inspection of public improvements within private development projects.
- Provide engineering services to improve public health and safety for projects such as streets, stormwater, etc.
- Provide general street and right-of-way maintenance services including street repair, sign installation, pavement markings, tree maintenance, mowing, street sweeping and litter control.
- Provide Park facility and ball field maintenance at the Town's parks and assist with special events.
- Responsible for inclement weather street maintenance, e.g. ice and snow removal and other types of storm clean-up.
- Provide municipal solid waste collection (MSW) and yard waste collection to single family residences and duplexes and MSW to multi-family residences and commercial users who elect to use the Town's service.
- Continued leaf mulch pile operations following NCDEQ requirements.
- Provide building maintenance and repairs to Town facilities.
- Manage cemetery operations including selling and marking plots at the Town's two cemeteries.
- Maintain and repair Town vehicles and equipment.

PREVIOUS YEAR ACCOMPLISHMENTS

- Continued to provide construction administration on the 203 Project, a building designed to LEED Gold standards, as it moves towards completion.
- Provided construction administration on the installation of the roof-top solar photovoltaic array on Fire Station 1 and Public Works reducing Carrboro's GHG by an estimated 16%.
- Initiated Westwood Cemetery Master Plan diversifying interment options for community members and enhancing the property.
- Installation of ADA compliant restroom at Bim Street facility.
- Installation of new fence at Old Carrboro Cemetery.
- Replaced 1,000-watt high pressure sodium light bulbs at Anderson Community Park with energy efficient LED lighting.
- Facilitated the Town's recertification as a Tree City USA for its 39th year.
- Completed annual street resurfacing and asphalt repairs, including addressing trip hazards from root damage on Frances Shetley and Libba Cotten Bikeways.
- Continued the leaf compost program, composting over 2,900 tons of leaves in fiscal year 2023.
- Continued to maintain, diagnose, and repair the Town's 108 vehicles and 70 pieces of equipment ranging from the largest ladder truck down to the smallest 2-cycle equipment.
- Continued to incorporate the Town's climate and racial equity and inclusion goals and objectives.

UPCOMING FISCAL YEAR OBJECTIVES

- Continue to provide Town services in the most efficient, safe, and quality manner.
- Improve and maintain existing infrastructure to protect the Town's assets, prioritizing Town Hall.
- Support continued work on Westwood Cemetery Master Plan opening new plots for sales.
- Improve landscaping at Town facilities with the use of native and pollinating plant species.
- Replace the Town's underground fuel storage tanks with above ground fuel tanks to mitigate environmental pollution issues and make our critical infrastructure more resilient to flooding.
- Repave Fitch Municipal Parking Lot utilizing ARPA funding.
- Continue to work with NCDOT to improve the ADA compliance of pedestrian infrastructure.
- Continue to assist the Stormwater Division with services for various stormwater management needs.
- Continue to coordinate and provide support on Town Council Strategic Priorities.
- Continue to incorporate the Town's climate and racial equity and inclusion goals and objectives.
- Complete the 203 project and open the building to the public relocating Carrboro Recreation and Parks into their new space.

RACIAL EQUITY ASSESSMENT

1. What racial equity and inclusion goals and objectives have been established for your department?

Public Works supports the goal of delivering services that help reduce disparities and promote service level equity and improve public participation within government for neighborhoods with higher percentages of BIPOC residents. These goals recognize the town wide interest in improved asset management, tracking and reporting, assessing disparities and promoting equity, participation, and leadership development for these neighborhoods/communities, and improving service levels and meeting the community's public health and welfare goals.

2. Describe racial equity and inclusion accomplishments to date.

Staff Recruitment and Retention:

- Participating in diversity trainings to increase our capacity to serve the community.
- Continuing to create an inclusive and respectful work environment.
- 50% of employees hired and/or promoted FY 2024 were minorities.

Projects and Services:

- Continued to provide construction administration on the 203 Project, as it moves towards completion.
- Completed sidewalk and curb ramp improvements along W. Poplar Street including ADA improvements.
- Completed installation of ADA restroom at Bim Street facility.
- Supporting projects and services that enable all residents to have equal access.

- Initiated Westwood Cemetery Master Plan diversifying internment options for community members and enhancing the property.
- Assisted Town Departments with various messaging boards, banner displays, and flag hangings representing various organizations and groups.
- Continued workflow and asset tracking work management software that show locations of projects and services to ensure all neighborhoods are being serviced.

Community Engagement:

- Provided ongoing community education around Public Works services.
- Coordinating with Communications Department to improve accessibility to communications.
- Revised Public Works outreach materials to improve language accessibility.
- Continued maintenance of Town Informational Kiosks in various underserved communities.

Policies and Procedures:

- Encouraging minority participation in all Town procurement activities.
- Ensuring policies and procedures prohibit discrimination.

3. Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?

Critical factors affecting Public Works ability to address racial equity and inclusion include:

- Town policy and administrative direction and support to move forward with specific projects and initiatives.
- Securing funding and financing to meet the desired program/service delivery and expansion.
- Staff capacity, within Public Works and other departments with which the Public Works collaborates and relies upon.
- Recruiting employees that may not have access to the traditional job recruiting methods.

4. How does current/future departmental projects address race and equity?

Future departmental projects that address race and equity include:

- Assist Planning Department with development of ADA transition plan.
- Continue to assist the Stormwater Division with services for various stormwater management needs.
- Pursue outreach opportunities to neighborhoods with higher proportions of BIPOC and lower income residents.
- Continue to improve language accessibility for outreach and educational materials.
- Continue to assist the Town with various messaging boards, banner displays, etc.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

1. What climate change and sustainability goals and objectives have been established for your department?

Public Works climate change and sustainability goals and objectives that have been established include:

- Reduce the Town's energy usage and GHG emissions and pursue renewable energy projects.
- Reduce the Town's use of fossil fuels and improve the efficiency of the motor vehicle fleet.
- Implement a Master Plan for Town Facilities including strategies to improve energy efficiency and sustainability.
- Partner with Orange County Solid Waste to implement recommendations in the new *Solid Waste Master Plan: Road to Zero Waste*.
- Incorporate energy and climate protection strategies and upgrades; and work with Environmental Sustainability Coordinator to identify other energy reducing projects.

2. Describe climate change and sustainability accomplishments to date.

Public Works climate change and sustainability accomplishments to date include:

- Continued to provide construction administration on the 203 Project, a building designed to LEED Gold standards, as it moves towards completion.
- Provided construction administration on the installation of the roof-top solar photovoltaic array on Fire Station 1 and Public Works reducing Carrboro's GHG by an estimated 16%.
- Replaced 1,000-watt high pressure sodium light bulbs at Anderson Community Park with 550-watt LED fixtures cutting energy consumption by 45%.
- Completed annual street resurfacing and asphalt repairs, including addressing trip hazards from root damage on Frances Shetley and Libba Cotten Bikeways.
- Facilitated the Town's recertification as a Tree City USA for its 39th year.
- Replaced older gas-powered equipment with battery operated equipment.
- Upgraded two HVAC systems at Fire Station 2.
- Continued to coordinate with Orange County Solid Waste and the Solid Waste Advisory Group to develop and implement the new *Solid Waste Master Plan: Road to Zero Waste*.
- Continued leaf mulch pile operations following NCDEQ requirements.

3. Based on assessment(s), what are the critical factors affecting the department's ability to address climate change and sustainability, internally and/or externally?

Critical factors affecting Public Works' ability to address climate change include:

- Securing new funding and financing as needed to meet the desired pace of program/service delivery and expansion.
- Cost and lack of charging infrastructure make transitioning to electric models of heavier equipment like dump trucks, excavators, etc. currently infeasible.

- Staff capacity.

4. How does the requested budget address climate change and sustainability?

Public Works FY 2024-25 budget requests address climate change by:

- Improve and maintain Town’s buildings and incorporate energy efficient and climate protection strategies and upgrades recommended by net zero consultant.
- Improve and maintain green space, and bicycle and pedestrian infrastructure including bike lane maintenance and improvements; landscaping improvements to help mitigate downstream flooding issues and make Carrboro more resilient to future climate events; park and cemetery maintenance and improvements; right-of-way tree maintenance and preservation; continuing the pollinator promoting vegetation plan; and continued implementation of invasive aquatic vegetation control.
- Maintain vehicles and equipment to keep them running efficiently and replace older gas-powered equipment with new battery-operated equipment to reduce greenhouse gas emissions.
- Continue to coordinate with Orange County Solid Waste and the Solid Waste Advisory Group to implement recommendations in the new *Solid Waste Master Plan: Road to Zero Waste*, specifically food waste diversion.
- Continued leaf mulch pile operations following NCDEQ requirements.

In considering the Community Climate Action Plan, Public Works staff will continue to work to specifically address the below CCAP and associated Comprehensive Plan elements:

- Buildings Recommendation #1: 80% Challenge
- Community Integration Recommendation #1: Create Grass Roots Partnerships to Engage Community
- Community Integration Recommendation #2: Expand Public Partnerships to More Explicitly Consider Climate Action
- Ecosystem Recommendation #3: Accelerate/Expand Organic Waste Collection/Composting
- Ecosystem Recommendation #4: Tree Preservation, Protection and Conservation
- Transportation Recommendation #1: 80% Challenge
- Transportation Recommendation #6: Improve Bicycle and Pedestrian Infrastructure

PERFORMANCE MEASURES

	FY 2020-21 ACTUAL	FY 2021-2022 ACTUAL	FY 2022-2023 ACTUAL	FY 2023-2024 ACTUAL	FY 2024-2025 PROJECTED
Square feet of Building Space Maintained	96,152	97,443	97,443	97,443	148,241
Miles of Road Maintained	46.68	47.04	47.04	47.04	47.08
Miles of Roadways Resurfaced	0	1.85	1.12	.45	1.25
Cubic Yards of Leaves Composted	5,730	3,845	14,670	6,354	7,500
MSW - Pounds/ Person/ Day	1.82	1.76	1.74	1.76	1.75
Work orders performed to maintain Town Vehicles	427	359	415	400	425

Budget Summary- Public Works Department

Department

PUBLIC WORKS	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$2,575,541	\$2,652,807
Operating Exp	\$1,614,457	\$2,060,368
TOTAL	\$4,189,998	\$4,713,175

Budget Summary- Public Works Divisions

Department

PUBLIC WORKS SUPERVISION	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$693,315	\$714,114
Operating Exp	\$51,156	\$53,755
TOTAL	\$744,471	\$767,869

Department		
PUBLIC WORKS STREETS & GROUND	FY 2024	FY 2025
	Adopted	Adopted
Personnel Exp	\$897,022	\$923,933
Operating Exp	\$593,087	\$721,087
TOTAL	\$1,490,109	\$1,645,020

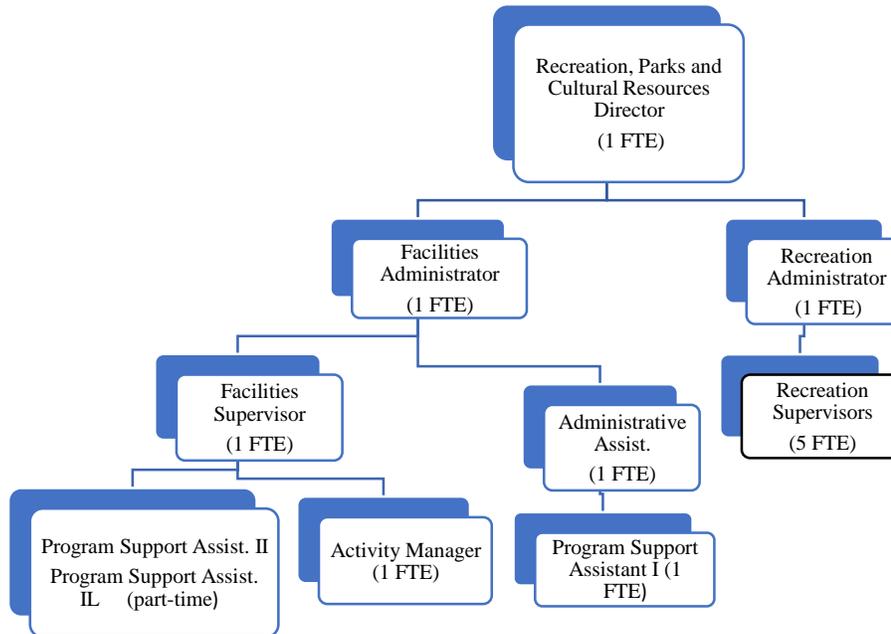
Department		
PUBLIC WORKS SOLID WASTE	FY 2024	FY 2025
	Adopted	Adopted
Personnel Exp	\$551,895	\$568,452
Operating Exp	\$526,351	\$661,675
TOTAL	\$1,078,246	\$1,230,127

Department		
PUBLIC WORKS CENTRAL SERVICES	FY 2024	FY 2025
	Adopted	Adopted
Personnel Exp	\$220,970	\$227,599
Operating Exp	\$401,927	\$580,496
TOTAL	\$622,897	\$808,095

PUBLIC WORKS FLEET MAINTENANCE	FY 2024	FY 2025
	Adopted	Adopted
Personnel Exp	\$212,339	\$218,709
Operating Exp	\$41,936	\$43,355
TOTAL	\$254,275	\$262,064

RECREATION, PARKS, AND CULTURAL RESOURCES DEPARTMENT

13.5 FTE



PURPOSE

Enrich the leisure needs, quality of life for citizens by providing accessible facilities, creative, diverse recreation opportunities, and a safe public park system.

GOALS

- Implement goals and strategies of the Carrboro Connects Comprehensive Plan
- Embed racial equity in departmental policies, processes, practices, and services.
- To enhance department marketing strategies to better inform the community of events, programs, and resources.
- Provide diverse recreational programs that address the needs of all residents.
- Continue work to implement department ARPA projects.
- Increase awareness and accessibility of parks and open spaces and identify new opportunities.
- Examine departmental operations to identify areas of opportunity for increased efficiency.

SERVICES PROVIDED & ACTIVITIES

- Develop, market, and implement recreation and leisure programs such as leagues, classes and other events that improve the quality of life for the citizens of Carrboro.
- Provide parks and facilities that provide space to enjoy nature, build family unity, meet friends, and build strong bodies.
- Demonstrate excellent customer service to citizens who register for programs and reserve or use recreation and park facilities.
- Facilitate the planning and implementation of programs and events that promote local arts and culture and enhance civic pride.

- Operate a variety of indoor and outdoor facilities, which help bring the community together by providing space, promoting values, community activity and healthy living.
- Serve as staff liaisons to citizen-based committees, various community groups and organizations and internal town committees including Recreation and Parks Commission, Arts Committee, and Carrboro Farmers Market.
- Facilitate community-requested events through the Carrboro Special Events Committee.

PREVIOUS YEAR ACCOMPLISHMENTS

- Staff served on several community and regional committees, including Orange County Senior Games, Healthy Carolinians of Orange County, Durham Orange Community Tennis Association, the Orange County Master Aging Plan, the Safe Kids Committee, Intergovernmental Parks Workgroup, and others.
- Increased the number of recipients and points of distribution of the Program Brochure, Monthly Program Newsletter, and Poetry Newsletter and utilized the Program Brochure to help with promotion on Town initiatives, such as the Comprehensive Plan, Community Services, recruitment for Town Advisory Boards, and The 203 Project.
- Hosted a United States Congresswoman Valerie Foushee and local leaders as special guest speakers for the annual Dr. Martin Luther King, Jr. Youth Event through partnership with NAACP Youth Council, Carrboro Youth Council, and Youth Advisory Board. Collaborated with students at Carrboro High School for an art project displayed at the event.
- Partnered with the Music Maker Relief Foundation, Carrboro Tourism Development Authority, and WUNC to offer professionally produced concerts for the Freight Train Blues Concert Series. Previous year shows aired on PBS NC.
- Offered a variety of programs with an emphasis on underserved populations and increasing cultural diversity.
- Partnered with the Orange County Community Remembrance Coalition and the BIPOC Elected Officials of Orange County to enhance Black History Month programming, hosting a talk with local leaders and a virtual poetry reading.
- Partnered with the Town of Chapel Hill, the NAACP Youth Council, and other community partners on the annual local Juneteenth Festival at Hargraves Center.
- Expanded outreach to community by establishing community-based recreation events using the mobile play unit and programs in senior living facilities collaborating with staff to conduct on-site programming.
- Supported artists through programs such as Carrboro Music Festival performers and the Black History Month Concert Series and other art-related programs.
- Assisted the Farmer's Market in providing staffing and assistance to administer the composting stations, helping with the Town's Climate Action goals.
- Staff attended annual conferences, seminars and workshops and took advantage of some free opportunities on ideas related to the pandemic hosted by organizations such as NRPA, NCRPA, RSS, NCRPA Therapeutic Recreation, NCSU and NC Seniors Games.
- Continued replacement of aging benches and picnic tables in multiple park facilities.
- Increased marketing and utilization of the old Carrboro Civic Club/Bim Street property. Worked with Public Works on renovations to increase accessibility.

UPCOMING FISCAL YEAR OBJECTIVES

- Work with Communications & Engagement Department to promote parks and open spaces for recreational opportunities through updates to park brochures and potential translation of documents using the Language Access Plan.
- Evaluate department policies, practices, procedures, and services using the One Orange Racial Equity Lens.
- Develop private, public, and neighborhood partnerships and sponsorships to support our recreational facilities and programs with a focus on agencies (El Centro, Refugee Support Center, and NAACP) that help to reach underserved populations.
- Identify potential partnerships for joint use of facilities to expand opportunities for local residents (ex. HOAs, Chapel Hill-Carrboro City Schools)
- Replace basketball court surface at Hank Anderson Park.
- Add LED lights to tennis courts at Hank Anderson Park.
- Collaborate with local partners and Town staff to create multi-purpose, outdoor programs that provide educational opportunities and increase environmental awareness.
- Identify new funding sources, such as community partnerships, sponsorships, and grants, to broaden the Department's revenue stream to maintain and enhance service levels.
- Utilize a broad range of evaluation criteria to ensure program offerings are meeting the needs of the participants.
- Expand recreational opportunities for underserved populations. (teens, seniors, immigrants/refugees)
- Work with facility partners to explore opportunities for collaboration as part of The 203 Project opening.
- Conduct evaluation of department programming to identify ways to achieve better operational efficiencies.

RACIAL EQUITY ASSESSMENT

- 1. What racial equity and inclusion goals and objectives have been established for your department?**
 - Engage with and listen to the voices of community members who have been historically excluded.
 - Create messaging and representation that creates more welcoming spaces for participation in programs and facility reservations.
- 2. Describe racial equity and inclusion accomplishments to date.**
 - Establishment of programs to celebrate Black History Month including a new Black History Month Concert Series.
 - Partnered with the Town of Chapel Hill, the Chapel Hill-Carrboro City Schools Office of Equity & Inclusion, the Chapel Hill-Carrboro NAACP, and other community partners on the creation of an annual Juneteenth Celebration.
 - Created mobile recreation opportunities to take programs into neighborhoods (ex. The Landings Tenants Association, apartment complexes, etc.) to provide recreational opportunities for residents.

- Partnered with the Town of Chapel Hill and other local arts and civic organizations on the creation of several community murals honoring Black citizens.
 - Worked with the Communications & Engagement Department on the enhancement of Libba Cotten Day through a proclamation and “birthday party”.
 - Worked with Music Maker Foundation on the Freight Train Blues Concert Series, honoring Elizabeth Cotten and showcasing and supporting African American blues and roots artists.
 - Worked with the Town Clerk’s office and several youth organizations, including the Chapel Hill-Carrboro NAACP Youth Council, establish an annual Dr. Martin Luther King, Jr. youth-led celebration.
 - Expanded participant accounts to include race and ethnicity of family members. Data collected may be used to evaluate who the department is serving and who is underserved.
 - Worked with Chapel Hill Housing to reduce barriers in Financial Assistance Program application process for residents utilizing public housing.
 - Increased utilization of BIPOC vendors for events (ex. food trucks).
 - Provided support for unveiling of Equal Justice Initiative marker dedication recognizing the lynching of Manley McCauley.
 - Purchased new feather flags to highlight holiday celebrations such as Kwanzaa.
- 3. Based on assessment(s), what are the critical factors affecting the department’s ability to address racial equity and inclusion, internally and/or externally?**
- It is critical to establish relationships with community members to help to build trust and facilitate further work on racial equity and inclusion.
 - Established relationships that the community has with other service providers (ex. other community centers) creates a challenge for connecting with potential new participants.
 - Public transportation routes and schedules do not always align with program site locations and event times. (ex. Anderson Park is not serviced by regular Chapel Hill Transit routes)
 - Outcomes from assessment evaluations and information from the Comprehensive Plan have provided information on impact and need in programming and facilities.
- 4. How does the requested budget address racial equity and inclusion? Please provide specific examples.**
- Community events such as Carrboro in Motion, Carrboro Day, etc. offer opportunities for outreach and collaboration with various community partners that help provide opportunities and services.
 - Arts & Culture programming provides an opportunity to enhance programming for Black History Month, the Juneteenth event, the annual Frederick Douglass July 4th event, programs highlighting BIPOC artists/performers, educators, etc.
 - Amenities such as benches and picnic tables can be strategically located in parks and any other areas identified that will address racial equity and inclusion for underserved areas identified in One Orange Racial Equity Lens assessment.

STRATEGIC ENERGY AND CLIMATE PROTECTION PLAN

Strategic Energy and Climate Protection Plan

All operating budgets must consider energy sustainability measures to reduce or eliminate carbon footprint. Each department is to submit an addendum (no more than two pages) that addresses the following questions:

1. What climate change and sustainability goals and objectives have been established for your department?

Implement more sustainable use practices in the implementation of programs and events

- Reduce the use of single-use plastics during programs.
- Work with vendors and contractors to use compostable materials.
- Utilizing CIP replacement schedule to convert athletic field lights to LED and automated systems.

Reduce the overall carbon footprint of department operations

- Prioritize the use of local vendors within the guidelines of the Town's procurement policies.
- Seek ways to reduce daily department vehicle usage.
- Explore alternatives for recreation programs that center on vehicle usage. (ex. parades)

Provide educational opportunities that advance overall Town sustainability goals

- Offer recreation classes and events that provide educational opportunities.
- Enhance existing events, such as Carrboro Day and Open Streets, to further increase outreach and educational opportunities.
- Partner with the Carrboro Farmers Market on potential workshops on sustainable food and waste practices such as the purchase of local food, composting, etc.
- Work with community partners to have information tables at Town-Sponsored events to provide educational materials and outreach on various environmental sustainability opportunities.

2. Describe climate change and sustainability accomplishments to date.

- Serve as the liaison department to the Carrboro Farmers Market.
- Provided support to the Market to continue operations safely during COVID.
- Currently serving in the lead role for the Farmers Market composting efforts for the Town until Planning can hire staff to take over the role.
- Implemented sustainability practices for food trucks at Town-sponsored special events.
- Worked with Planning on the site identification and installation of new EV charging stations at Dr. Martin Luther King, Jr. Park. Additional opportunities are being reviewed.
- Working with Public Works on the feasibility of converting athletic field lights to LED.
- Working with Carrboro Community Garden Coalition to provide sustainable food sources within the community.

- 3. Based on assessment(s), what are the critical factors affecting the department’s ability to address climate change and sustainability, internally and/or externally?**
- Collaboration between departments is critical to better understand assessment criteria, best practices, and opportunities to help achieve Town goals.
 - Data management tools and staffing expertise from environmental sustainability staff are important to establish and evaluate measurables.
 - Potential funding could assist with offering more educational opportunities.
- 4. How does the requested budget address climate change and sustainability? Please provide specific examples.**
- Town special events, such as Open Streets, Carrboro Day, Kidical Mass Bike Ride, etc. offer educational and outreach opportunities for both Town departments and for community organizations.
 - Department camps and clinics, such as the Bike Maintenance clinics, help to encourage alternative modes of transportation.
 - Serving as the liaison to the Farmers Market allows the department to provide support to Market operations and opportunities for collaboration.

For assistance with energy and sustainability measures, please contact Laura Janway, Environmental Sustainability Coordinator.

Budget Summary- Recreation & Parks

Department	FY 2024 Adopted	FY 2025 Adopted
RECREATION & PARKS		
Personnel Exp	\$1,467,068	\$1,511,080
Operating Exp	\$573,476	\$821,810
TOTAL	\$2,040,544	\$2,332,890

Budget Summary- Recreation & Parks Divisions

Department	FY 2024 Adopted	FY 2025 Adopted
RECREATION & PARKS SUPERVISION		
Personnel Exp	\$161,731	\$166,583
Operating Exp	\$34,072	\$158,575
TOTAL	\$195,803	\$325,158

Department

GENERAL PROGRAMS

	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$756,587	\$779,285
Operating Exp	\$409,870	\$427,190
TOTAL	\$1,166,457	\$1,206,475

Department

FACILITIES

	FY 2024 Adopted	FY 2025 Adopted
Personnel Exp	\$548,750	\$565,213
Operating Exp	\$129,534	\$236,045
TOTAL	\$678,284	\$801,258

NONDEPARTMENTAL

PURPOSE

Non-Departmental appropriations are used to account for items not readily identified with other organizational departments or functions.

SERVICES PROVIDED & ACTIVITIES

Budgeted funds are set aside for:

- Compensation Adjustments
- Dependent Health Insurance
- Unemployment Insurance Reserves
- Risk and Safety Remediation
- Miscellaneous Town Council initiatives
- Transfers to Other Funds

Non-department funds are allocated to departments as needed.

Budget Summary- Non-Departmental

Department	FY 2024	FY 2025
Non-Departmental	Adopted	Adopted
Personnel Exp	\$1,294,711	\$2,108,381
Operating Exp	\$315,000	\$1,000,000
Transfers	\$499,500	\$0
TOTAL	\$2,109,211	\$3,108,381

CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET:

The personnel budget sets aside funds for a salary adjustment and minimum housing wage adjustments for employees, anticipated increase in health insurance costs, and required unemployment insurance reserve. The FY 2025 personnel amount includes a 10% increase in existing town staff salary, and a 6.9% increase in health insurance costs. The operating expense includes programming not defined in the FY 2025 budget across all departments. No transfers are assumed in the FY 2025 budget; FY 2024 included assumed transfers into both the Parking Fund and Affordable Housing Fund.

DEBT SERVICE

PURPOSE

The Debt Service cost center accounts for expenditures used for the payment of principal and interest associated with the Town’s general obligation bonds and other financings.

BACKGROUND

In North Carolina, the Local Government Commission in the State Treasurer’s Office oversees local government bonded debt and assists local governments in all areas of fiscal management. This agency conducts all bond sales and ensures that local units have sufficient fiscal capacity to repay debt. The Town is subject to the Local Government Bond Act of North Carolina which limits the amount of net bonded debt the Town may have outstanding to 8% of the appraised value of property subject to taxation.

Debt Service Schedule- FY. 24-25			
Project	Principal	Interest	Total
Vehicles/Equipment	\$267,353	\$11,297	\$278,649
Sidewalk/Greenways	\$0.00	\$26,250.00	\$26,250
	\$250,000	\$26,250.00	\$276,250
	\$250,000		
Fire Station #2	\$108,333	\$2,024	\$110,357
203 Project	\$0.00	\$168,016	\$168,016
	\$662,000	\$168,016	\$839,349
	\$1,537,686	\$401,852	\$1,698,871

Budget Summary- DEBT SERVICE

Department	FY 2024 Adopted	FY 2025 Adopted
Debt Service		
Operating Exp	\$1,821,530	\$1,698,871
TOTAL	\$1,821,530	\$1,698,871

CHANGES IN BUDGET FROM PRIOR YEAR ADOPTED BUDGET:

Principal and interest payments are anticipated to decrease in FY 2025 due to complete repayment of Fire House 2, offset by principal and interest payments to the 203 Project.

SPECIAL REVENUE FUNDS

The Special Revenue Fund accounts for revenues and expenditures legally restricted or designated by the Town Council for specific program activities or services. The Special Revenue Fund was restructured in 2011 to comply with GASB 54. Included in the Special Revenue Fund are the following funds:

- Affordable Housing
- Grant Administration
- Powell Bill
- American Rescue Plan Act
- Emergency Loans
- Revolving Loans for Energy Efficiency
- Revolving Loans for Economic Development

BUDGET SUMMARY- SPECIAL REVENUE FUNDS

	Adopted	Adopted		
	Budget	Budget	\$	%
	FY2023-24	FY2024-25	Change	Change
American Rescue Plan Act	\$6,426,677	\$5,657,508	-769,169	-12.0%
Grant Administration	\$811,909	\$640,449	-171,460	-21.1%
Affordable Housing	\$593,923	\$604,930	11,007	1.9%
Powell Bill	\$545,812	\$562,186	16,374	3.0%
Revolving Loan Fund	\$407,690	\$407,690	0	0.0%
Revolving Loans for Energy Efficiency	\$205,227	\$205,227	0	0.0%
Emergency Loans	\$131,600	\$131,600	0	0.0%
Total	\$9,122,838	\$8,209,590	-913,248	-10.0%

AFFORDABLE HOUSING FUND

This fund was created to advance the Town’s goal of increasing the stock of affordable, safe, and decent housing within the Town and its’ planning jurisdiction. The fund was established by a resolution on June 26, 2007, and guidelines for allowable activities are revised periodically. Payments to the fund, made by developers, in lieu of providing affordable housing under the applicable provisions of the Land Use Ordinance, are deposited into the fund in addition to any other revenues such as grants, donations, loans, interest payments, or other contributions.

BUDGET SUMMARY- AFFORDABLE HOUSING FUND

Revenues:	Adopted
	Budget
	FY2024-25
Ad Valorem Tax	\$404,837
Interest Earnings	\$11,900
Payment in Lieu	\$0
Transfer from General Fund	\$188,193
Total Revenues	\$604,930
Expenditures:	
Unexpended Reserves	\$604,930
Total Expenditures	\$604,930

GRANT ADMINISTRATION FUND

This fund accounts for grant awards made to the Town that are legally restricted to expenditures for specific programs, activities, and purposes. Recent grant awards include North Carolina Community Development Block Grant (CDBG) to provide rental assistance to qualified Carrboro residents.

BUDGET SUMMARY- GRANT ADMINISTRATION FUND

	Adopted	Adopted
	Budget	Budget
	FY2023-24	FY2024-25
Revenues:		
Grant Revenue	-	
Hazard Mitigation Grant	487,816	487,816
NC CDBG Coronavirus Program	-	-
Article 46	27,575	17,575
Orange County Criminal Justice	152,518	135,058
Bolin Crk Watershed Restoration	144,000	-
Other Revenues	-	
Total Revenues	811,909	640,449
Expenditures:		
Hazard Mitigation Grant	487,816	487,816
Article 46	27,575	17,575
Police & Mental Health Diversion Program	152,518	135,058
Bolin Crk Watershed Restoration	144,000	-
Total Expenditures	811,909	640,449

POWELL BILL FUND

Annually, State Street-Aid (Powell Bill) allocations are made to incorporated municipalities which establish their eligibility and qualify as provided by G.S. 136-41.1 through 136-41.4. The Town's special revenue fund for Powell Bill was established by council on September 14, 2021.

BUDGET SUMMARY- POWELL BILL FUND

Powell Bill	Adopted	Adopted
	Budget	Budget
	FY 2023-24	FY 2024-25
Revenues:		
Interest Earnings	\$6,500	\$6,500
Powell Bill Revenue	\$539,312	\$555,686
Fund Balance Appropriated		
Total Revenues	\$545,812	\$562,186
Expenditures:		
Professional Services	\$40,000	\$40,000
M & R Equipment	\$5,000	\$5,000
Advertising	\$600	\$186
Departmental Supplies	\$30,000	\$32,000
Contractual Services	\$70,212	\$85,000
Construction	\$400,000	\$400,000
Total Expenditures	\$545,812	\$562,186

AMERICAN RESCUE PLAN ACT FUND

The American Rescue Plan Act was signed into law on March 11, 2021, and provides funding to state and local governments to assist with pandemic rescue and recovery efforts. These funds may be used for a range of activities including: 1) revenue replacement for the provision of government services to the extent the reduction in revenue is due the COVID-19 public health emergency; 2) premium pay to essential employees; 3) assistance to small businesses, nonprofits, household and hard-hit industries, and economic recovery; and 4) investments in water, sewer, and broadband infrastructure.

BUDGET SUMMARY- AMERICAN RESCUE PLAN ACT FUND

	Life-to-Date	Adopted	YTD Actual Expenses	Adopted
	Actuals	Budget		Budget
		FY2023-24		FY 2024-25
Revenues:				
Interest Earnings				
Grant Revenue	\$6,753,199	\$6,426,677		\$5,657,508
Total Revenues	\$6,753,199	\$6,426,677		\$5,657,508
Expenditures:				
Negative Economic Impacts	\$326,522		\$326,522	
Premium Pay				
Revenue Replacement	\$6,426,677	\$6,426,677	\$442,647	
Unexpended Reserves				
Total Expenditures	\$6,753,199	\$6,426,677	\$769,169	\$5,657,508

EMERGENCY LOAN FUND

The purpose of the Emergency Loan Fund is to assist Carrboro based businesses and non-profits that serve Carrboro with short term payroll and other recurring expenses during the State/Town declared COVID 19 Emergency to maintain and sustain operations for existing viable enterprises. The fund is intended to assist small local businesses and non-profits that are in current good standing with creditors but are low on capital to maintain operations. Loan approval is at the discretion of the Town of Carrboro. Ten percent of the provided funding is considered a grant and ninety percent is considered a loan. The loan portion is to be repaid to the Town at zero percent interest.

BUDGET SUMMARY- EMERGENCY LOAN FUND

	Adopted
	Budget
	FY 2024-25
Revenues:	
Interest Earnings	\$4,000
CARES Grant Revenues	\$0
Loan Principal Payments	\$127,600
Other Financing Sources	\$0
Total Revenues	\$131,600
Expenditures:	
Grant Disbursements	\$0
Loan Disbursements	\$0
Other Financing Uses	\$0
Reserves for Loans	\$131,600
Total Expenditures	\$131,600

ENERGY EFFICIENCY REVOLVING LOAN FUND

The Energy Efficiency Revolving Loan was started in 2010 with US Department of Energy funds through a grant to Southeastern Energy Efficiency Alliance (SEEA) for the Town to implement a small business energy efficiency revolving loan fund with the goal of increasing energy efficiency in commercial buildings.

BUDGET SUMMARY- ENERGY EFFICIENCY REVOLVING LOAN FUND

	Adopted Budget
	Budget
	FY 2024-25
Revenues:	
Interest Earnings	\$2,696
Loan Interest Earnings	\$16,615
Loan Principal Payments	\$57,788
Other Financing Sources	\$128,128
Total Revenues	\$205,227
Expenditures:	
Loan Disbursements	\$0
Reserves for Loans	\$205,227
Total Expenditures	\$205,227

REVOLVING LOAN FUND

The Revolving Loan Fund is used to encourage economic and community development in Carrboro by offering loans to new businesses and encouraging businesses to locate in Carrboro. The Fund sustains itself with the interest earned on loans and repayment of the principal provided to businesses. With this interest, a reserve is created that enables the Town to continue loaning funds to businesses. As loans are paid off, the Town closes the loans and removes them from financial records.

BUDGET SUMMARY- REVOLVING LOAN FUN

Revenues	Adopted Budget FY24-25
Interest Earnings	\$246,437
Loan Interest Earnings	\$56,606
Loan Principal Payments	\$104,647
Total Revenues	\$407,690
Expenditures:	
General Government Exp	\$0
Loan Disbursements	\$0
Reserves for Loans	\$407,690
Total Expenditures	\$407,690

CAPITAL PROJECTS FUND

Capital projects are projects financed (in whole or in part) by the proceeds of bonds, notes or debt instruments involving the construction or acquisition of a capital asset. Capital projects are approved via a balanced project ordinance as required by the North Carolina General Statutes (GS 159-13.2) whereby the Town budgets for the life of the capital project. A project ordinance is balanced when revenues estimated to be available for the project equal appropriations for the project. Projects that show a zero balance are no longer active, considered completed, and are removed from the general ledger one year following project completion.

The Capital Projects Fund is comprised of the following funds:

- Capital Projects
- GO Bonds, Sidewalks and Greenways
- Facilities Rehab
- Capital Reserve
- Payment In Lieu Reserves

Budget Summary - CAPITAL PROJECT FUNDS				
	Adopted Budget FY2023-24	Adopted Budget FY 2024-25	Amount Change	Pct Change
Fund:				
Capital Projects	35,907,914	20,451,378	(15,456,536)	-43%
GO Bonds, Sidewalks and Greenways	4,531,257	3,423,810	(1,107,447)	-24%
Facilities Rehab	458,597	458,597	-	0%
Capital Reserves	568,032	1,218,032	650,000	114%
Payment In Lieu	110	120	10	9%
Other			-	
Totals	\$41,465,910	\$25,551,937	(15,913,973)	-38%

CAPITAL PROJECTS

Funds are appropriated for capital projects via a balanced project ordinance as required by the North Carolina General Statutes (GS 159-13.2) whereby the Town budgets for the life of the capital project; or capital projects may be appropriated in the annual general fund budget.

BUDGET SUMMARY - CAPITAL PROJECTS			
		Adopted Budget FY 2023-24	Adopted Budget FY 2024-25
Revenues:			
Interest Earnings		62,346	62,346
Restricted Intergovernmental		20,045,652	20,132,032
Transfer from General Fund		1,684,916	257,000
Transfer from Stormwater Fund			
Other Financing Sources		14,115,000	
Total Revenues		\$35,907,914	\$20,451,378
	FY 24 Expenses		
Expenditures:			
203 S Greensboro St	15,480,833	33,123,696	17,642,863
South Greensboro St Conduit		120,000	120,000
Estes Drive Bike-Ped Improvements		170,000	170,000
Bus Shelter Replacement	-	272,700	272,700
Ped Safety Imprvmnts & Bike Plan	167,621	257,000	89,379
Bicycle Loop Detectors		38,975	38,975
2024 Vehicle & Equip Replacements			964,000
2025 Vehicle & Equip Replacements			882,000
108 Bim St Renovations	12,756	15,670	2,914
Jones Ferry Rd Retaining Wall		88,404	88,404
Anderson Park Parking Lot Paving		105,256	105,256
Wayfinding - Town Signage		50,000	50,000
East Main Street Signal & Pavement Mrkgs	28,326	53,213	24,887
Capital Expense Reserve		-	-
Total Expenditures		\$35,907,914	\$20,451,378

GO BOND-FUNDED SIDEWALKS AND GREENWAYS

The Town continues its sidewalks and greenways construction program authorized by the voters in 2003. In January 2013, the Town discontinued the use of bond anticipation notes to finance this construction and issued \$4.6 million of general obligation bonds. The Town does not have any other outstanding general obligation bonds.

BUDGET SUMMARY- GO BOND FUNDED SIDEWALKS AND GREENWAYS

	Adopted Budget FY 2023-24	Adopted FY2024-25	FY23 to FY24 Percent Change
Revenues:			
Interest Earnings	\$181,000	\$185,000	
Restricted Intergovernmental	\$3,153,847	\$2,042,400	
Other Financing Sources	\$1,196,410	\$1,196,410	
Total Revenues	\$4,531,257	\$3,423,810	-32%
Expenditures:			
Morgan Creek Greenway Ph1	\$1,265,346	\$1,183,386	
S Greensboro St Sidewalk	\$2,596,017	\$1,570,530	
Jones Creek Greenway	\$669,894	\$669,894	
Sidewalk Repairs	\$0	\$0	
Projects Closed in 2022		\$0	
Capital Expense Reserve	\$0	\$0	
Total Expenditures	\$4,531,257	\$3,423,810	-32%

FACILITIES REHABILITATION FUND

On November 12, 2019, the Board of Aldermen authorized the establishment of a Facilities Rehabilitation Fund. The purpose of this Fund is to repair and rehabilitate existing Town Facilities. No new construction is permitted under this Fund.

BUDGET SUMMARY – FACILITIES REHABILITATION FUND

	Adopted Budget FY 2024-25
Revenues:	
Interest Earnings	
Transfer from General Fund	\$458,597
Total Revenues	\$458,597
Expenditures:	
Projects Closed in 2022	-
Repl Windows & Chiller at Century Ctr	\$458,597
Capital Expense Reserve	\$0
Total Expenditures	\$458,597

CAPITAL RESERVE

The Town has established a capital reserve fund to set aside funds for specific future capital projects. The Town has set aside funds for the following.

Street Resurfacing – In past years, the Town has set aside reserves for street resurfacing.

Future Debt Service – The Town has set aside reserves in anticipation of debt to be issued in the future for facility improvements.

BUDGET SUMMARY - CAPITAL RESERVE FUND

	Adopted Budget FY 2023-24	Adopted Budget FY 2024-25
Revenues:		
Interest Earnings	\$7,874	\$7,874
Other Financing Sources	\$560,158	\$1,210,158
Total Revenues	\$568,032	\$1,218,032
Expenditures:		
Future Fire Apparatus		\$650,000
Future Debt Service	\$568,032	\$568,032
Total Expenditures	\$568,032	\$1,218,032

PAYMENT IN LIEU RESERVE

The Payment-in-Lieu Reserve Fund was established in 1985. Developers whose residential developments are required to provide on-site active recreational areas and open space areas may choose to make a payment-in-lieu of providing such facilities with Town approval.

These funds are held in reserve for one of four geographically defined quadrants of the town (where the residential development is located) for use in acquisition and development of recreational facilities, present or future. A requisite of the payment use is that the improvement be reasonably expected to serve the subdivision from which the payment was made.

BUDGET SUMMARY – PAYMENT IN LIEU RESERVE

Revenues:	Life-to-Date Actuals	Adopted Budget FY 2023-24	Adopted Budget FY 2024-25
Interest Earnings	\$2,929	\$110	\$120
Payment in Lieu	\$149,780	-	
Total Revenues	\$ 152,709	\$110	\$120
Expenditures:			
Reserves	\$152,709	\$110	
Total Expenditures	\$ 152,709	\$110	\$120

STORMWATER UTILITY

4 FTEs

Stormwater Manager (1 FTE)
Stormwater Specialist (1 FTE)
Stormwater Administrator (1 FTE)
Stormwater Assistance Coordinator (new)
(1 FTE)

PURPOSE & GOALS

The Stormwater Utility's mission is to improve and enhance local ecosystems and maximize quality of life/place and resiliency in relation to rainfall and runoff. The primary goals are:

- To deliver excellent service, ensuring effective and efficient use of financial, human, and physical resources.
- To manage a well-balanced public infrastructure.
- To serve as a community catalyst for the expansion of green stormwater infrastructure practices.

COUNCIL PRIORITIES

- Pursue stormwater and infrastructure improvements and environmental protection and tree-canopy.
- Create new incentive program for businesses and households.
- Create retrofit toolbox.

SERVICES PROVIDED & ACTIVITIES

- Revenue: administer Stormwater Utility Enterprise Fund; pursue other revenue streams.
- Staff support for the Stormwater Advisory Commission.
- Program coordination-interdepartmental, local/community, state, federal.
- Regulatory compliance and activities (Townwide permit-six management measures; Public Works facility permit).
- Watershed restoration activities.
- Stormwater infrastructure asset management/condition assessment.
- Supporting the community in creating resilience in the face of more frequent intense storms, within certain constraints.

PREVIOUS YEAR ACCOMPLISHMENTS

- Completed EPA 319 grant-funded project for regenerative stormwater conveyance installation (Bolin Forest neighborhood).
- Completed stormwater infrastructure condition assessment field work.
- Completed Residential Assessment Pilot Project and developed new Watershed Restoration Residential Assistance. Program. Amended Stormwater Utility rate structure to fund new program.
- Provided staff support to the Stormwater Advisory Commission.
- Provided regulatory support for NPDES permits (Town and Public Works).

- Improved and expanded community outreach and engagement, including supporting the expansion of Orange County Creek Week activities. Coordinated with other staff and community partners.
- Administered Stormwater Enterprise Fund.

UPCOMING FISCAL YEAR OBJECTIVES

- Maintain all existing services.
- Launch Watershed Restoration Residential Assistance Program
- Follow up on infrastructure condition assessment; program and pursue Stormwater repair and improvement projects and master planning.

**STORMWATER PROGRAM ANNUAL PERFORMANCE METRICS
With a Focus on improvements AND community participation**

	Subdivided in Tracking		
1. Improvement Projects (#)	Stormwater	Stream	Riparian
1a. Improvement (linear feet)	Stream	Stormwater Conveyance (Green)	Stormwater Conveyance (Grey)
1b. Improvement (acres)	Developed area	Impervious area	Riparian Area
2. Project participants (#)	Neighborhoods	Organizations	Individuals
3. Improvement project funds (\$)	Enterprise Fund	Federal/State	Other
4. Stormwater Control Measures (#)	Regulated SCMs	New Town SCM Retrofits	New Other SCM Retrofits

The above metrics are intended for inclusion in the annual operating budget and to provide important indicators of specific annual accomplishments and goals with a focus on active and planned improvements. The Stormwater Program tracks other performance metrics as part of regulatory permits, workflow and asset management, grants, and other program activities.

Definitions

Developed Area – An area of land that has been modified from a natural condition. Includes areas with buildings, transportation infrastructure, lawns, and other types of development. The area tracked is the area treated by an SCM.

Enterprise Fund - Carrboro’s Stormwater Enterprise Fund which funds Stormwater Program operations and projects.

Impervious Area – Land area upon which rainfall is not able to infiltrate. The area tracked is the area treated by an SCM.

Improvement Project – A funded and active project during the FY and pursued with the intention of improving stormwater management and conveyance and/or enhancing streams and/or riparian areas.

Other \$ -All other \$ from sources besides Carrboro’s Stormwater Enterprises Fund or Federal/State agencies.

Neighborhood – A single family residential area that may or may not have a Homeowners Association.

Organization - An organization besides a neighborhood/HOA (other government/agency, business, nonprofit) participating in an improvement project. Does not include organizations under contract to the Town.

Participant – An organization or resident collaborating with staff to consider, plan for or complete an improvement project. Does not include organizations under contract or providing funding to the Town.

Retrofit – A type of stormwater improvement pursued retrospectively rather than during the original development.

Riparian Area – A low lying area that defines the interface between uplands and surface waters and serves as a buffer.

Riparian Project – A project intended to enhance or restore the riparian area via creation of diffuse flow through the buffer and/or establishment of native vegetation.

Stream Project – refers to an enhancement (bank stabilization or more involved restoration) project for a jurisdictional (intermittent or perennial; federal/state regulated) or Town regulated ephemeral stream.

Stormwater Project - A project focused on better managing stormwater runoff. Note that stormwater is defined as the immediate runoff associated with upland developed areas and stormwater projects are distinct from stream, riparian, and flood mitigation projects.

Stormwater Control Measure (SCM) – A stormwater management measure as defined by NCDEQ.

Stormwater Control Measure: Regulated (SCM) – An SCM regulated by the Town as part of a land use permit.

Stormwater Conveyance - Pipes and ditches (grey); regenerative conveyances and bioswales (green)

STORMWATER PROGRAM ANNUAL PERFORMANCE METRICS
With a Focus on improvements, community participation and SCMs
(FY24 | FY25)

1. Improvement Projects (#)	Stormwater		Stream		Riparian	
	4(a)	7 (b)	0	1(b)	0	0
1a. Improvement (linear feet)	Stream		Stormwater Conveyance (Green)		Stormwater Conveyance (Grey)	
	0	0	800 (c)	0	470 (d)	3500 (b)
1b. Improvement (acres)	Developed area		Impervious area		Riparian Area	
	18 (c)	30 (e)	4.5 (c)	8 (e)	0	0
2. Participants (#)	Neighborhoods		Organizations		Individuals	
	1 (f)	0	7 (g)	4 (g)	83 (h)	TBD
3. Improvement project funds (\$)	Enterprise Fund		Federal/State		Other	
	\$85k (i)	\$450k (i)	\$120k (c)	\$20k (k)*	\$35k(l)	\$0
4. Stormwater Control Measures (#)	Regulated SCMs		New Town SCM Retrofits		New Other SCM Retrofits	
	180	189	1 (i)	4 (m)	0	0

Notes

- a. 319 grant-Bolin Forest (2); Residential Assessment Pilot Project (70 properties); 203 Project.
- b. 203 Project; Fire Station #1/Fidelity Street; Pipe Lining Project; Pipe Replacement Project; Anderson Park Project; Morgan Creek Project (stream); Old Pittsboro St. Project; Master Planning Project.
- c. 319 grant.
- d. 203 Project, Fidelity Street (construction).
- e. Watershed Restoration Residential Assistance Program, Fire Station #1, Anderson Park
- f. Bolin Forest (includes 3 HOAs) as part of 319 project.
- g. 319 grant partners (Orange County; OWASA; NC Cooperative Extension; Friends of Bolin Creek; UNC Eco Studio); Orange County Haw River Assembly; Urban Sustainability Solutions; UNC Eco Studio.
- h. 13 residential properties as part of the 319 project and 70 as part of the Residential Assessment Pilot Project.
- i. 203 Project, Fire Station #1/Fidelity St. (design).
- j. Fire Station #1/Fidelity St. (construction); pipe lining and replacement; Anderson Park design; Morgan Creek restoration design; Old Pittsboro design.
- k. Fire Station #1/Fidelity St. (Powell Bill funding for r-o-w construction) * potential NCDWI LASII funds (\$400k).

- l. Wild Oak Lane RSC (Urban Sustainability Solutions [319 grant]).
- m. Fire Station #1 bioretention, Anderson Park (3).

RACIAL EQUITY ASSESSMENT

Stormwater Division Racial Equity and Inclusion Goals and Objectives

The Division supports the Town's goals of delivering services that help reduce disparities and promote service level equity, improving public participation in government, and supporting stormwater related leadership/capacity development for neighborhoods with higher percentages of BIPOC residents. These goals recognize the town wide interest in improved asset management, tracking and reporting, assessing disparities and promoting equity, participation, and leadership development for these neighborhoods/ communities, and improving service levels and meeting the community's public health and welfare goals. The Division supports the goals and direction established by Public Works.

The additional and specific objectives that the Stormwater Division will pursue in FY 2025 are to:

- A. Continue to work with other Town staff and community leaders with relevant insights and perspectives to better understand potential geographic and racial disparities and inequities in terms of the a) experience of flooding; b) condition of Town maintained stormwater infrastructure; c) availability and access to natural areas in general and healthy riparian areas and creeks specifically; d) interest in green stormwater infrastructure and nature based stormwater solutions- all for neighborhoods with higher percentages of BIPOC populations
- B. Continue to use the information obtained in (A) to inform and prioritize: Pollution Prevention and Good Housekeeping and Illicit Discharge Detection and Elimination and stormwater infrastructure condition assessment activities; stormwater maintenance and repair services; and planning and prioritization of grey and green stormwater infrastructure improvements and geographic and strategic priorities.

Racial Equity and Inclusion Accomplishments to Date

Projects and Services:

- Implementing workflow and asset tracking work management software that show locations of projects and services to ensure all neighborhoods are being serviced.
- Supporting projects and services that enable all residents to have equal access.
- Specifically, the Residential Assessment Pilot Project and new Watershed Restoration Residential Assistance Program included a Racial Equity Lens
- Staff supported racial equity and inclusion related components for stormwater in the Comprehensive Plan. Specifically, a priority for Stormwater staff in FY 2025 will be further investigation of how to: 1) enable residents to participate and benefit from technical and financial assistance to renters and homeowners for residential installation of green infrastructure, with an ability to offer priority to more flood prone and lower income

residents; 2) plan for an incentive program for stormwater management or infrastructure mitigation projects that prioritize BIPOC-led businesses.

Community Engagement:

- Providing ongoing community education around Public Works services.
- Coordinating with Communications Department to improve accessibility to communications.

Policies and Procedures

- Continuing to seek and encourage minority participation in all Town procurement activities.
- Ensuring policies and procedures prohibit discrimination.

Staff Recruitment and Retention:

- Participating in diversity trainings to increase our capacity to serve the community.
- Continuing to create an inclusive and respectful work environment.

Critical Factors Affecting the Division’s Ability to Address Racial Equity and Inclusion

Staff/resource capacity and authority/responsibility are the main factors. The Stormwater Division is receiving a persistent and considerable demand to rapidly address issues that a) have been many decades in the making and will take many years and arguably decades to address; b) for which the Town has limited authority and responsibility to address since the root causes are primarily on private property and additionally are associated with accelerating/expanding frequency and intensity of heavy rains. Specific factors to support the Stormwater Division in this new direction include:

- a. Town policy and administrative direction and support to move forward with specific projects and initiatives, and to not overburden Stormwater staff with new/unanticipated and significant requests for services that are outside the approved budget, scope of services, and workload.
- b. Staff capacity, both with Stormwater Division and in other Divisions and Departments with which the Division collaborates and relies upon.
- c. Securing new funding and financing to meet the desired program/service delivery and expansion.

How do current/future departmental projects address race and equity? Please provide specific examples of requested budget’s approach to addressing racial equity and inclusion.

The following input into the Stormwater Division’s ability and approach to address racial equity and inclusion are offered.

- 1) The budget submittal, staff workplan, comprehensive plan and newly identified strategic priorities includes follow up on infrastructure condition assessment work and new work to identify financial incentives and develop a retrofit toolbox. Racial equity pocket questions/lens will be provided for new initiatives as they emerge.
- 2) Specifically, a component for Stormwater staff in FY 2025 will be launching a program to enable homeowners to participate and benefit from technical and financial assistance to for residential installation of green infrastructure, with higher cost sharing to lower income

- residents; 2) plan for an incentive program for stormwater management or infrastructure mitigation projects that prioritize BIPOC-led businesses.
- 3) The just completed 319 grant project is in a neighborhood that is not identified with a higher percentage of BIPOC residents, nor one that is economically disadvantaged relative to other neighborhoods in Carrboro. A nonprofit, Urban Sustainability Solutions, has used this work as a springboard to a new 319 grant and is targeting outreach in a historically underserved neighborhood (Pleasant Drive/Oak Ave. extension area). It will continue to be important to reach out to such neighborhoods in developing projects for pursuit of future grant funds. One of the drivers for this project moving forward was the amount of grass roots/neighborhood driven planning for the project. Some outreach to investigate creating this capacity in other neighborhoods will be important going forward. Town staff will work with the project partners and others (e.g., Empowerment, Inc.) to publicize and encourage outreach to neighborhoods with more BIPOC residents for which capacity building is desired. Support from other staff will be needed.
 - 4) Given that further pursuit of CIP updating is pending direction, specific information is not provided. Stormwater staff are prepared to update CIP recommendations based on the Town’s racial equity tools at the appropriate time.

BUDGET SUMMARY – STORMWATER

Department	FY 2024 Adopted	FY 2025 Adopted
STORMWATER		
Personnel Exp	\$348,433	\$348,433
Operating Exp	\$399,813	\$793,575
Transfers	\$314,500	\$500,000
TOTAL	\$1,062,746	\$1,642,008

PARKING ENTERPRISE

PURPOSE

The Parking Enterprise Fund was established in FY 2021 to track all parking related expenses for the growing needs of parking facilities in the Town. The Town Council has requested a parking study to consider the implementation of parking fees for various parking facilities. The Parking Enterprise Fund will be funded with a transfer from the General Fund, until such time that the Fund can generate its own revenue source.

BUDGET SUMMARY – PARKING ENTERPRISE

Department	FY 2024	FY 2025
Parking	Adopted	Adopted
Enterprise		
Personnel Exp	\$2,000	\$75,000
Operating Exp	\$139,000	\$141,000
TOTAL	\$141,000	\$216,000

GLOSSARY

Ad Valorem tax - A tax levied in proportion to the value of a property.

Annual Budget - A budget covering a single fiscal year.

Annual Comprehensive Financial Report (ACFR) - The official annual report of a government.

Appropriated Fund Balance – The amount of fund balance budgeted as revenue to offset expenses that exceed current revenue.

Appropriation - The amount budgeted on a yearly basis to cover projected expenditures which the Town Council legally authorizes through the budget ordinance.

Approved Budget - The budget as formally adopted by the Town Council for the upcoming fiscal year.

Assessed Valuation - The estimated dollar value placed upon real and personal property by the county assessor as the basis for levying property taxes. The General Assembly exempted household personal property from taxation effective July 1, 1987.

Audit – An examination, usually by an official or private accounting firm retained by the Town Council that reports on the accuracy of the annual financial report.

Authorized Positions - Employee positions that are authorized in the adopted budget to be filled during the fiscal year.

Balanced Budget - Occurs when planned expenditures equal anticipated revenues. In North Carolina, it is required that the budget submitted to the Town Council be balanced.

Bond - A written promise to pay a specific amount of money with interest within a specific time period, usually long-term.

Bond Rating - A grade indicating a governmental unit's investment qualities. The higher bond rating, the more favorable the interest rate and the lower the cost of financing capital projects funded by bonds. A high rating is indicative of the government's strong financial position. Ratings range from AAA (highest) to D (lowest).

Budget - A financial plan for a specified period of time that matches planned revenues and expenditures with various Town services.

Budget Message - A written overview of the proposed budget from the Town Manager to the Town Council. This overview discusses the major budget items of the Manager's budget.

Capital Improvements Plan (CIP) - A long term plan of proposed capital improvement projects including estimated project costs and funding sources the Town expects to undertake within a five-year period. The plan is updated annually to reassess capital needs.

Capital Outlay - An expenditure that results in the acquisition of, or addition to, a fixed asset.

Capital Project Fund - A fund used to account for the acquisition or construction of major capital facilities and equipment.

Consumer Price Index (CPI) – A statistical description of price levels provided by the U.S. Department of Labor. The index is used as a measure of the increase in the cost of living (economic inflation).

Contingency - Appropriation intended for unanticipated expenditures. The Town Council controls transfer of these funds into an expendable account.

COVID-19 - COVID-19 is a new strain of coronavirus that has not been previously identified in humans. The COVID-19 is the cause of an outbreak of respiratory illness first detected in Wuhan, Hubei province, China.

Debt Service - Principal, interest and administrative costs associated with the repayment of long-term debt.

Department - A major administrative division of the Town that has overall management responsibility for an operation within a functional area.

Encumbrances – An approved financial commitment for services, contracts, or goods which have not been delivered or performed.

Enterprise Fund - A grouping of activities whose expenditures are wholly or partially offset by revenues collected from consumers in the form of fees and charges.

Expenditures - The total cost of a program or capital project.

Fiscal Year (FY) - A 12-month period (July 1 through June 30) in which the annual operating budget applies and at the end of which an assessment is made of the Town's financial condition and performance of operations.

Fixed Asset – A capital item that has an acquisition cost of \$5,000 or more, is tangible, and has an expected minimum life of 1 year.

Fund - An accounting entity created to record the financial activity for a selected financial group.

Fund Balance - Funds accumulated through the under expenditure of appropriation and/or receiving revenues greater than anticipated and included in the budget.

General Fund - A fund which provides for the accounting for most of the basic government services, such as police, fire, sanitation, inspections, law enforcement, recreation, and other general services.

General Obligation Bonds - Bonds issued by a government which are backed by the full faith and credit of its taxing authority.

Geographic Information System (GIS) - An organized collection of computer hardware, software, geographic data, and personnel designed to efficiently capture, store, update, manipulate, analyze, and display all forms of geographically referenced information.

Goal - A broad statement of desired conditions to be maintained or achieved through the efforts of an organization.

Governmental Funds – consists of the General Fund, Special Revenue Fund and Capital Project Fund.

Interest and Penalties Receivable on Taxes - Uncollected interest and penalties on property taxes.

Lease Purchase - A method of purchasing equipment in which payments are spread over a period of time.

Levy - The amount of tax, service charge, and assessment imposed by the government.

Line Item - A budgetary account representing a specific object of expenditure.

Local Government Commission (LGC) - The Local Government Commission, which is chaired by the State Treasurer, is an oversight body that ensures municipalities and other governmental units fulfill their statutory obligations with regard to State and local government finance.

LTD – Life to Date

Major Fund Reporting – General Government Accounting Principles require governmental fund data be presented separately for each individual major governmental fund. General Fund is always considered a major fund. The Non-Major Funds include the Revolving Loan, Capital Projects, Grant, Capital Reserve, Payment in Lieu Reserve, and Affordable Housing Funds.

At a minimum, governmental funds other than the general fund must be reported as major funds if they meet both of the following criteria:

- 10% criterion. An individual governmental fund reports at least 10% of any of the following: a) total governmental fund assets, b) total governmental fund liabilities, c) total governmental fund revenues, or d) total governmental fund expenditures

- 5% criterion. An individual governmental fund reports at least 5% of the aggregated total for both governmental funds and enterprise funds of any one of the items for which it met the 10% criterion.

Modified Accrual - The basis of accounting for the Town. Under this system, expenditures are recognized when encumbered.

Midpoint of Salary – a rate that is halfway between the minimum rate and maximum rate of a budgeted position.

National Fire Protection Association (NFPA) - An international nonprofit NFPA is to reduce the worldwide burden of fire and other hazards on the quality of life by providing and advocating consensus on codes and standards, research, training, and education.

Non-major Fund – see definition for Major Fund Reporting.

Objective - A specific statement of what is to be accomplished or achieved for a particular program during the fiscal year.

Operating Budget - The Town's financial plan which outlines proposed expenditures for the upcoming fiscal year and estimates revenues which will be used to finance them.

Operating Expenses - Those expenditures of a recurring nature, covering services and supplies necessary to operate individual departmental activities.

Orange Water and Sewer Authority (OWASA) – OWASA is the public, nonprofit water and sewer utility serving the Carrboro-Chapel Hill community. OWASA's nine-member Board of Directors is appointed by the Carrboro Town Council, the Chapel Hill Town Council, and the Orange County Board of Commissioners.

Ordinance - A formal legislative enactment by the Town Council which has the full force and effect of law within the boundaries of the Town.

Occupational Safety and Health Act (OSHA) – Regulations passed by the US Department of Occupational Safety and Health Administration to assure safe and healthful working conditions for working men and women by authorizing enforcement of the standards developed under the Act.

Pandemic – An outbreak of a disease that is prevalent over a whole country or the world.

Parking Utility Enterprise Fund – This fund comprehensively addresses the vehicle parking needs of the Town. The Enterprise Fund will be funded with a transfer from the General Fund until such time the Town implements a fee structure for parking facilities.

Personal Property - Movable property classified within two categories: tangible and intangible. “Tangible” or touchable property includes items of visible and movable property not permanently affixed to real property. “Intangible” or non-touchable property includes stocks, bonds, notes, cash, bank deposits, accounts receivable, patents, trademarks, copyrights, and similar assets.

Personnel Services - Salaries and wages paid to employees for full-time, part-time, and temporary work, including overtime and similar compensation. Also included in this account group are fringe benefits paid for employees.

Program - A well-defined portion of the operating plan for which a distinct set of goals and objective may be developed.

Property Tax - Tax paid by those owning property in the Town.

Property Tax Rate - The rate at which real property in the Town is taxed in order to produce revenues sufficient to conduct necessary governmental activities.

Proprietary Funds – consists of the Stormwater Utility Fund.

Real Property - Land, buildings, and items permanently affixed to land or buildings.

Real Property Value - The value of land and buildings which are taxable.

Reclassification - A change in the classification and corresponding job title of an existing position which results from a major change in assigned responsibilities.

Reserve - An account designed for a portion of the fund balance which is to be used for a specific purpose.

Revaluation - The process of revaluing a jurisdiction’s real property in order to adjust the tax value to the market value; by North Carolina law, a revaluation must be conducted at a minimum of every eight years. Orange County revalues property every four years. Property was revalued as of January 1, 2017.

Revenue - All funds that the Town government receives as income, including items such as tax payments, fees for specific services, receipts from other governments, fines, forfeitures, shared revenues, and interest income.

Revenue-neutral Tax Rate - The revenue-neutral tax rate, as defined by G.S. 159-11(e), is the rate that is estimated to produce revenue for the next fiscal year if no reappraisal had occurred. The rate is then adjusted by a growth factor equal to the average annual percentage increase in the tax base due to improvements since the last general reappraisal. State law requires that units of local government, including public authorities, publish a revenue-neutral tax rate in the budget immediately following the completion of the general reappraisal of real

property. The purpose of the revenue-neutral tax rate is to provide residents with comparative information.

Sales Tax - Tax paid by retail consumers in the Town.

Service Level - The amount of service provided during the fiscal year as indicated by one or more performance indicators.

Special Revenue Funds – Specific revenue sources (other than major capital projects) that are legally restricted expenditures for specific purposes.

Stormwater Utility Enterprise Fund – This fund comprehensively addresses the stormwater management needs of the Town. The Enterprise Fund establishes a dedicated source of funding for stormwater and flood remediation.

Tax Levy - Revenue produced by applying a given tax rate to a property's assessed, or tax value.