

City Council Work Session Handouts

June 2, 2014

- I. Review and discuss The Main Street/Central Expressway Corridor Enhancement / Redevelopment – Rezoning Initiative, including a recap of the community workshop and discussion related to building heights and street characteristics
- II. Review and discuss the City of Richardson budgeting philosophy and the Fiscal Year 2014-2015 Budget Calendar
- III. Review and discuss the Collin Central Appraisal District and Dallas Central Appraisal District Preliminary 2014 – 2015 Tax Roll
- IV. Review and discuss the Over 65 and Disabled Person Exemption
- V. Review and discuss the Charter Review Process

City Council Work Session

June 2, 2014



Image Source – Richardson Public Library



MAIN STREET / CENTRAL - REZONING INITIATIVE

JACOBS
Kimley»Horn
AN IRVING-CLOUD COMPANY

Richardson, Texas

Agenda

- Project Overview
- Community Workshop Overview
- Viewshed Analysis Conclusions
- Main Street Design Components
- Next Steps

Project Overview

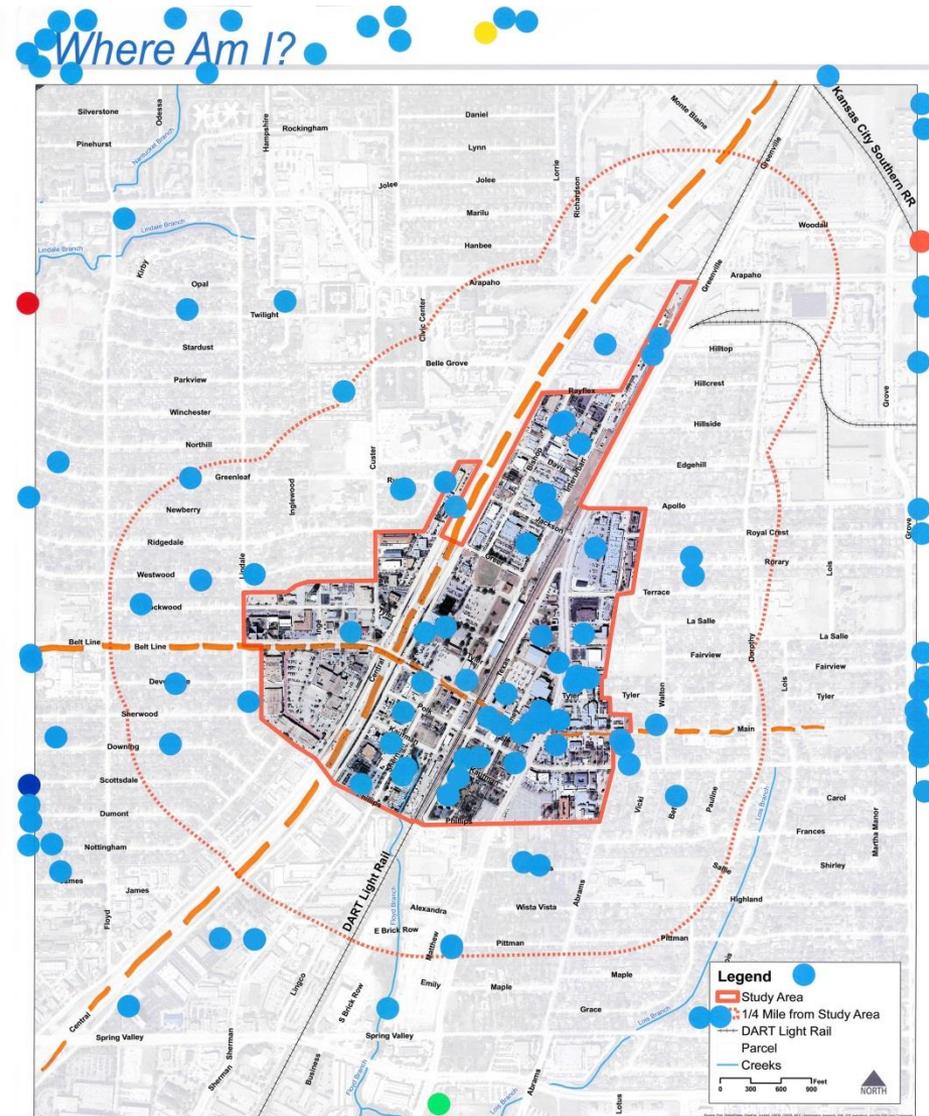
Next Steps (3-17-14)

- Based upon feedback received tonight, the Jacobs Team will conduct a Community Open House to share the vision direction for the 4 sub-districts, confirm the additional transportation and viewshed analyses results, and share Council's direction
- Following the Community Open House, the Team will prepare alternative cross sections for Belt Line / Main Street
- The Team will brief the City Council in June on the comments received at the Community Open House, present the Belt Line / Main Street cross sections, and will provide recommendations to the City Council related to maximum building heights
- Based upon Council feedback, the Team will refine alternative cross sections, and will prepare draft zoning documents for the four subdistricts for stakeholder and community discussions

Community Workshop Overview

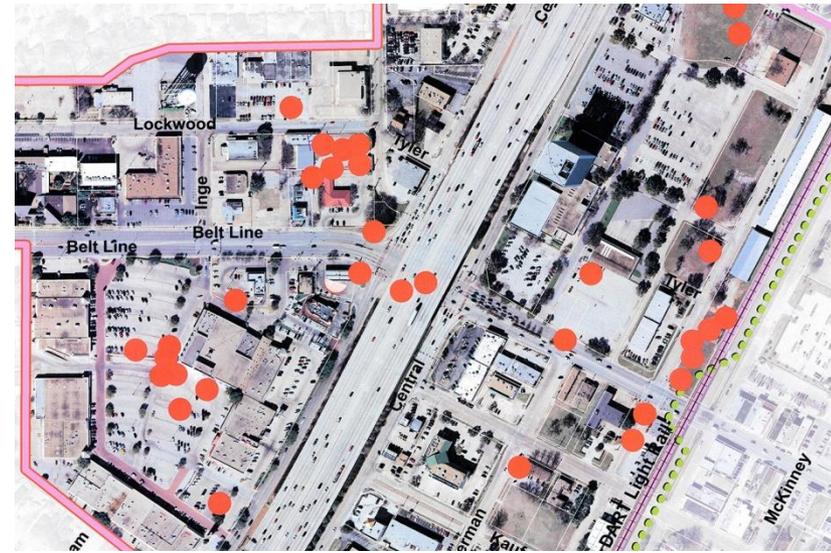
Community Workshop - Overview

- A Community Workshop was held at Richardson City Hall on May 14, 2014
- More than 100 residents, business owners and property owners from the corridor and surrounding areas attended
- A brief presentation was made related to the viewshed analysis, then participants shared their opinions at several stations



Community Workshop – Central Place Feedback Synopsis

- Which streets provide the most important connections for nearby residents who want to walk or bike to the restaurants and attractions of the Central Place Sub-District?
- *Where should open spaces and plazas be located within the Central Place Sub-District?*



Community Workshop – Central Place Feedback Synopsis

- The southwest quadrant of the Central Place Sub-District is envisioned as a mixed-use entertainment district. What kinds of entertainment choices should be here?
 - *Wine bistro*
 - *No apartments*
 - *Yes apartments*
- What improvements will make it safer and more appealing for cyclists and pedestrians to cross under U.S.75?
 - *Put central below grade – create a “mini” Klyde Warren Park!*
 - *Lighting*



Community Workshop – Main Street Feedback Synopsis

- Where should a public plaza or other gathering place be located?
- Which streets provide the most important connections for nearby residents who want to walk or bike to the Main Street Sub-District?
- ***Where could shared parking lots or garages be provided in the Main Street Sub-district?***

Main Street Sub-District - Parking



Community Workshop – Main Street Feedback Synopsis

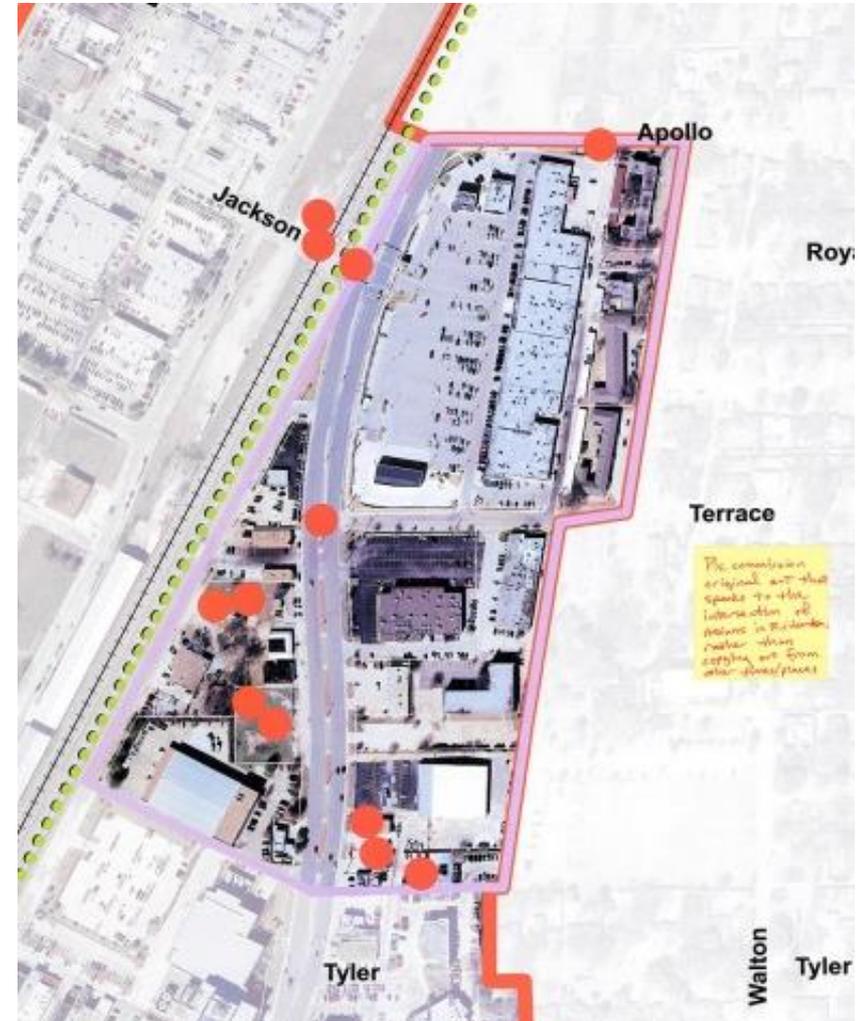
- What sorts of places and activities will make the Main Street Sub-District vibrant and eclectic?
 - *Independently owned restaurants*
 - *Ice Creams Shops*
 - *Variety – less of the same things*
- What other actions beyond this rezoning initiative could help revitalization of the Main Street Sub-District?
 - *Make direct path to DART from Main Street*
 - *Connection to both sides of US 75*
 - *Approach AT&T about donating their parking lot for additional parking*



Community Workshop – Chinatown Feedback Synopsis

- What locations in the Chinatown Sub-District are most suitable for multi-generational housing?
- Which streets provide the most important connections for nearby residents who want to walk or bike to the Chinatown Sub-District?
- Where should public art be accommodated and how focused should it be on Chinese-influenced art?
 - ***Art that speaks to the intersection of Asians in Richardson***

Chinatown Sub-District - Public Art



Community Workshop – Chinatown Feedback Synopsis

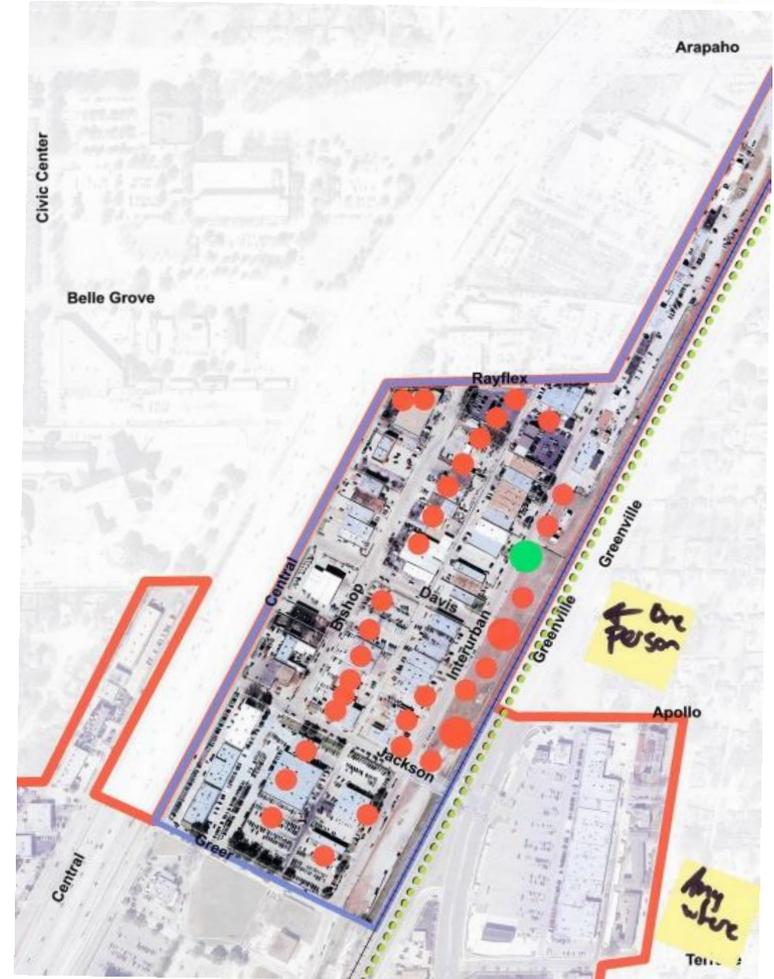
- What uses or amenities will strengthen the Chinatown Sub-District as a regional destination?
 - *Art and cultural events for all*
 - *Central gathering place (plaza/fountain)*
 - *Community education and marketing*
 - *Galleries for Asian art*
- What other actions beyond this rezoning initiative could help revitalization of the Chinatown Sub-District?
 - *Business Association*
 - *Change name to reflect all cultures!*



Community Workshop – Interurban Feedback Synopsis

- *Where should ‘live-work’ buildings be located within the Interurban Sub-District – are there certain streets that are most suitable for this?*
- Where could shared parking lots or garages be located?

Interurban Sub-District - Live-work Buildings



Community Workshop – Interurban Feedback Synopsis

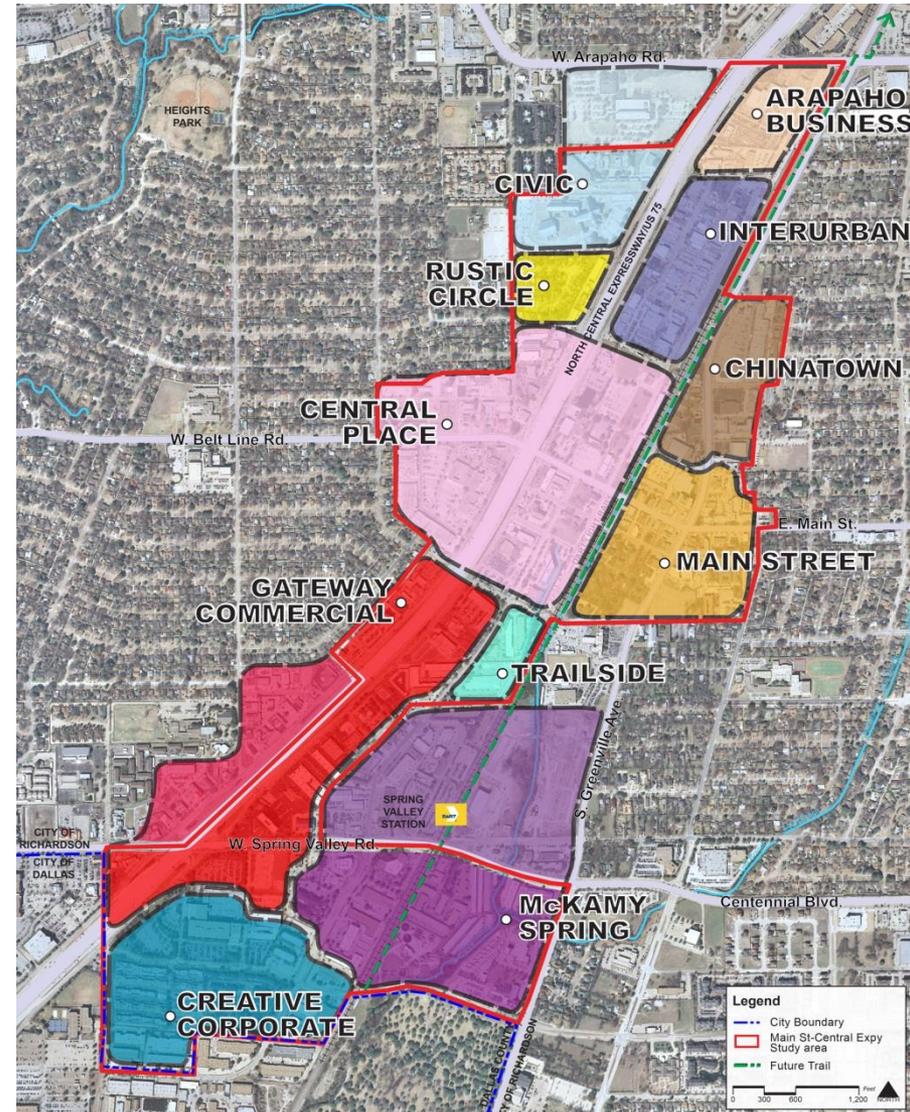
- What improvements or enhancements will increase the Interurban Sub-District’s appeal to artists and entrepreneurs?
 - *Co-working spaces/ incubators*
 - *Outdoor mural/graffiti opportunities*
 - *Allow the market to determine parking needs*
 - *Keeping rent affordable – attract quality*
- What other actions beyond this rezoning initiative could help revitalization of the Interurban Sub-District?
 - *Small business grants*
 - *Tax relief/rebates*
 - *Development seed money*



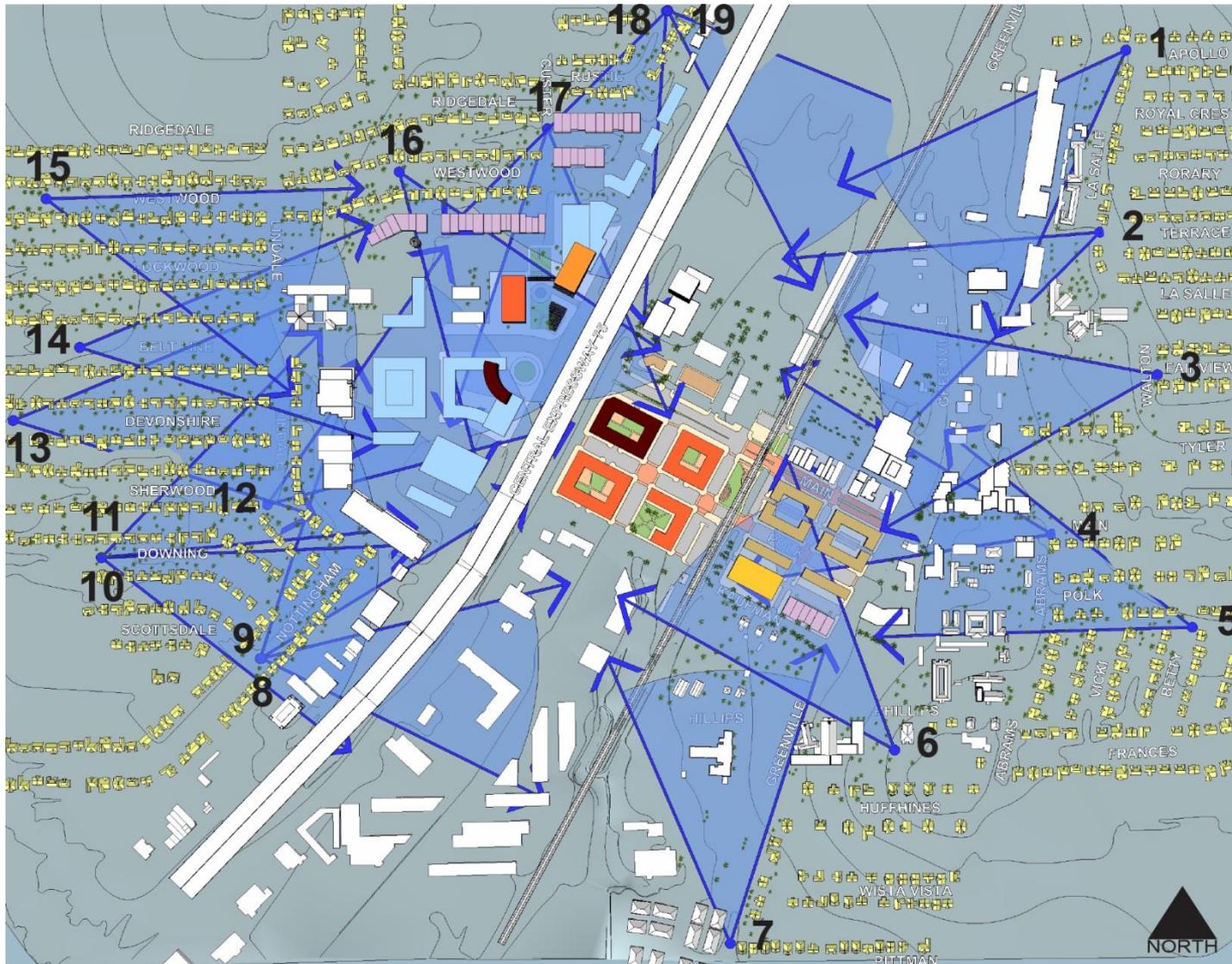
Viewshed Analysis Conclusions

Viewshed Analysis - Process / Assumptions

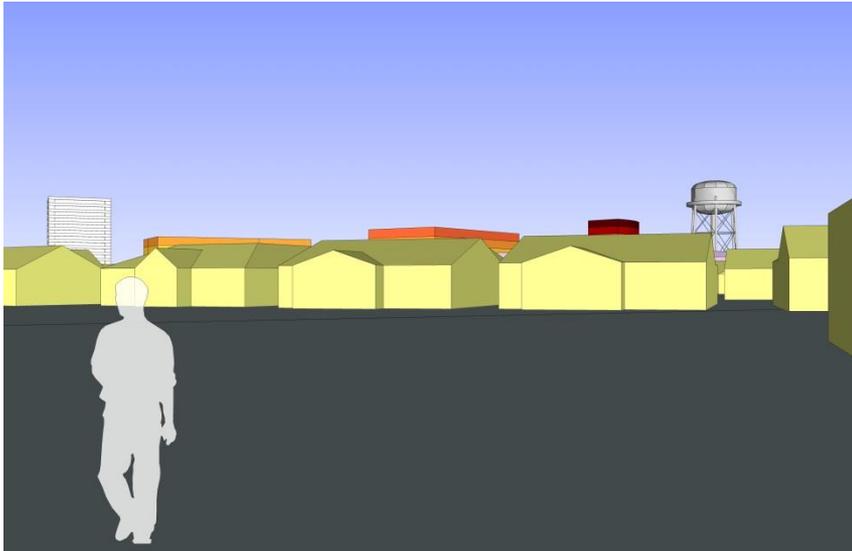
- Existing topography was incorporated into the model
- Locations chosen represent worst-case scenarios
- Views taken were without trees to represent worst-case scenarios
- Building heights were measured in stories *and* feet
- Distance from buildings is a factor in the viewers perception of the buildings



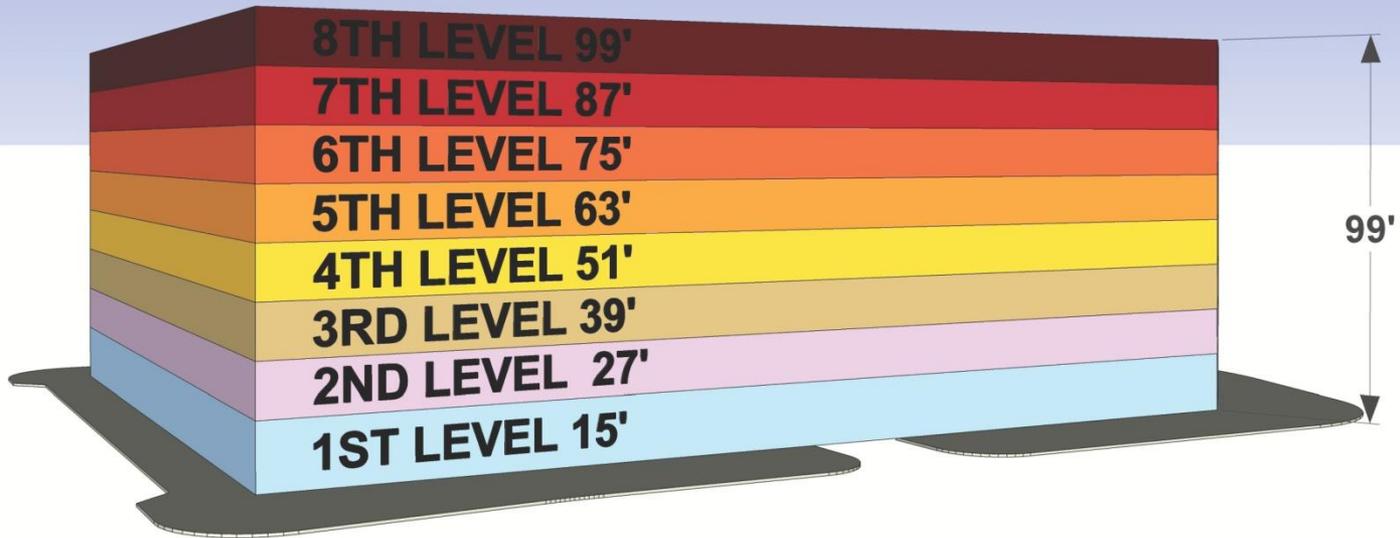
Locations Studied



Trees



Building Heights

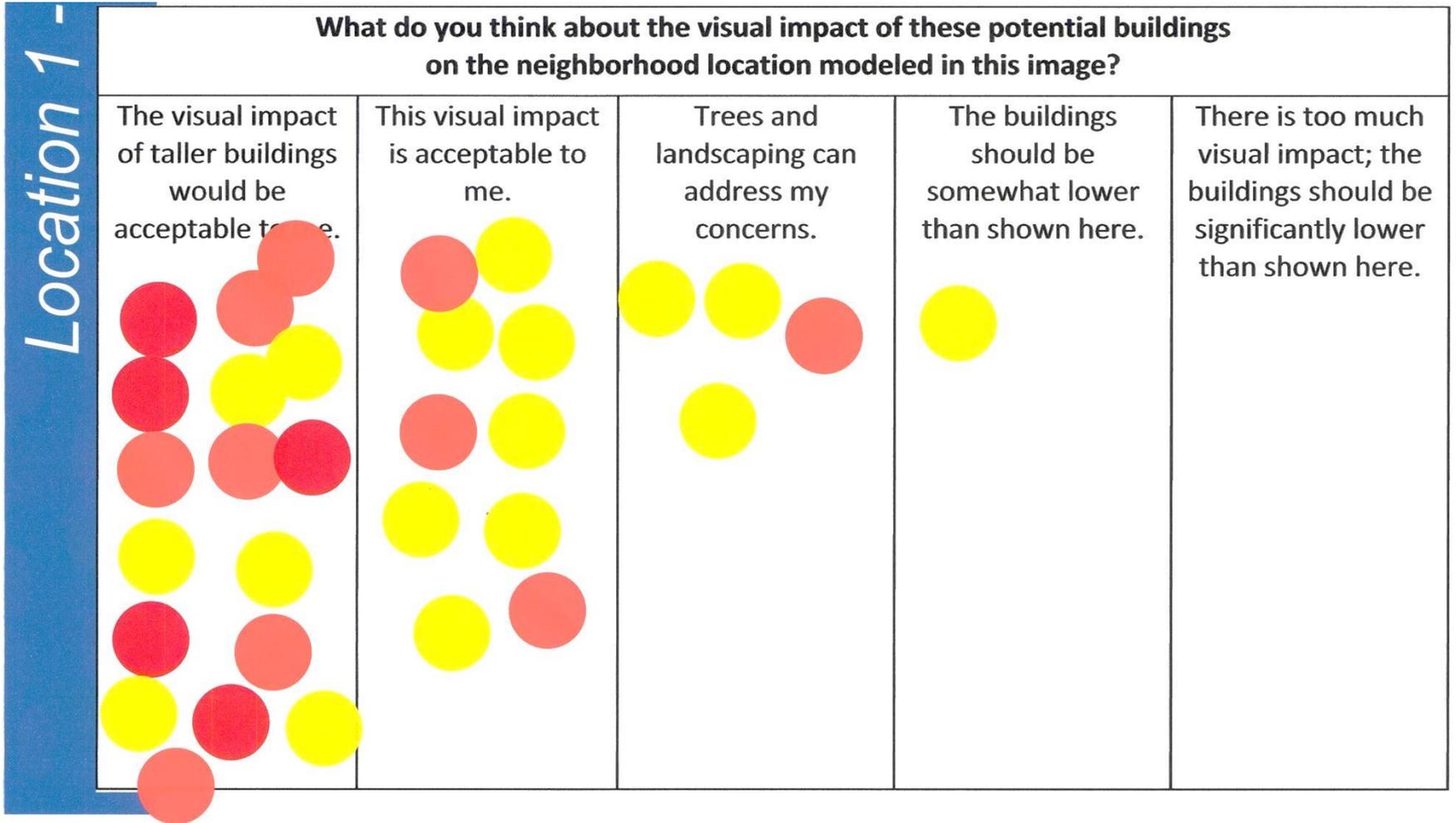


Distance



MAIN STREET / CENTRAL - REZONING INITIATIVE

Community Feedback – Northeast Quadrant (Orange)



Community Feedback – Northeast Quadrant (Orange)

Viewshed Analysis- Northeast Quadrant

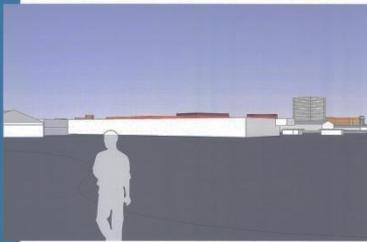
Location 1 - Main Street / Apollo

Location 2 - Main Street / Terrace



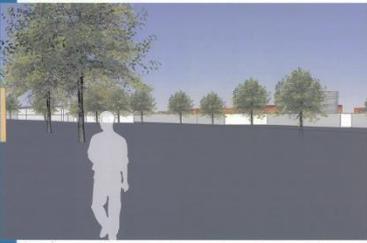

Location 1 - Main Street / Apollo

Location 2 - Main Street / Terrace

Location 1 - Main Street / Apollo

Location 2 - Main Street / Terrace




Location 1 - Main Street / Apollo

Location 2 - Main Street / Terrace

| What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image? | | | | |
|--|---|--|---|---|
| The visual impact of taller buildings would be acceptable to me. | This visual impact is acceptable to me. | Trees and landscaping can address my concerns. | The buildings should be somewhat lower than shown here. | There is too much visual impact; the buildings should be significantly lower than shown here. |
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May 14, 2014

 Kimley+Horn
 Richardson, Texas

Viewshed Analysis- Northeast Quadrant

Location 3 - Main Street / Fairview



Location 3 - Main Street / Fairview



Location 3 - Main Street / Fairview



Location 3 - Main Street / Fairview

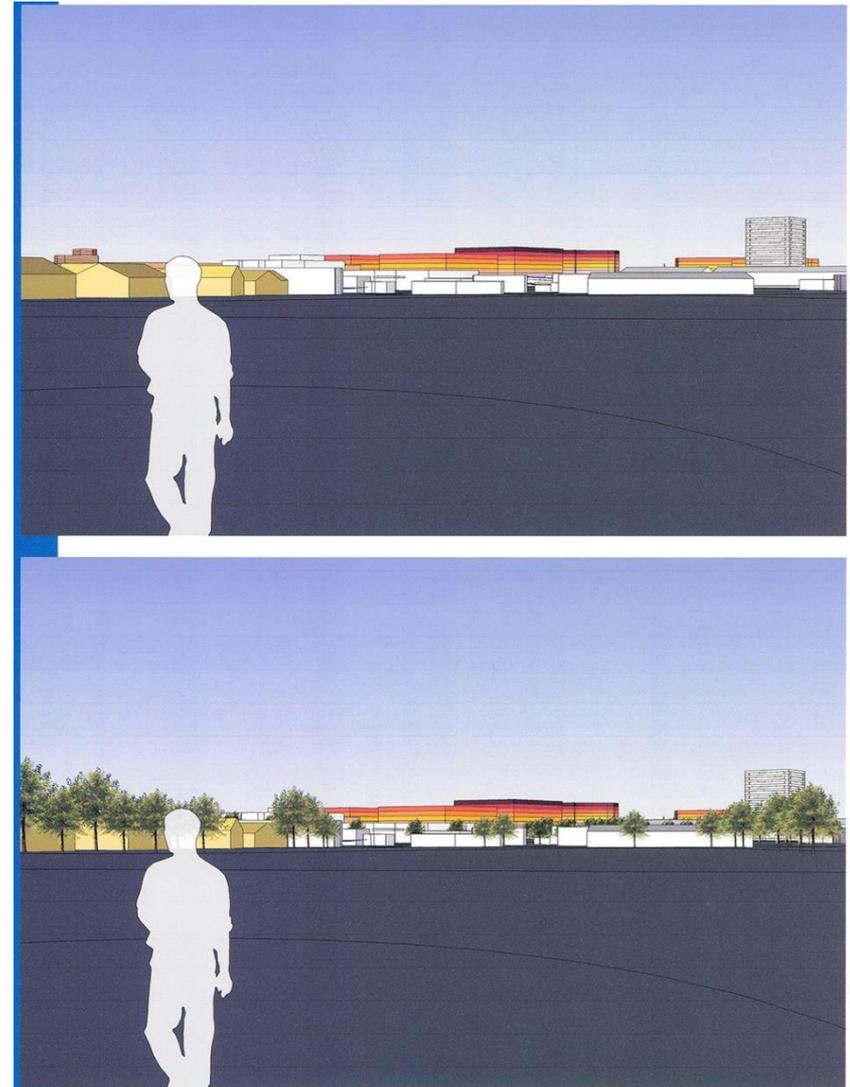
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May 14, 2014

 Kimley+Horn
 Richardson, Texas

Recommendation – Northeast Quadrant (Orange)

- One respondent living within ¼ mile of this quadrant indicated a preference for somewhat lower buildings
- Multiple respondents living within ¼ mile of this quadrant indicated that the building heights indicated were acceptable, or that taller buildings could be acceptable
- ***Recommendation – No change to building heights in the northeast quadrant from those indicated in the model***

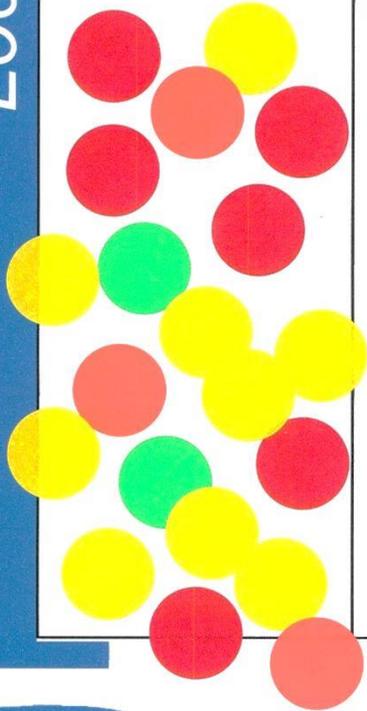


Community Feedback – Southeast Quadrant (Green)

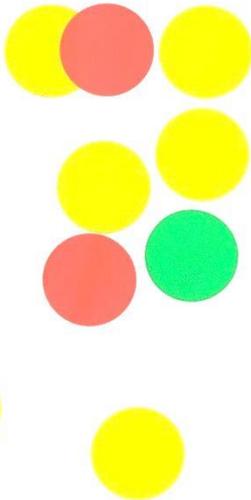
Location 4 -

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

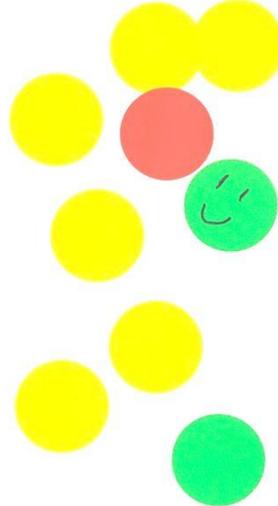
The visual impact of taller buildings would be acceptable to me.



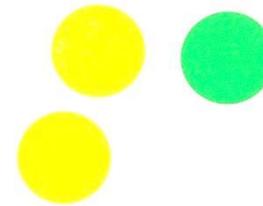
This visual impact is acceptable to me.



Trees and landscaping can address my concerns.



The buildings should be somewhat lower than shown here.



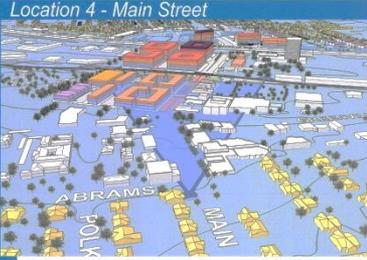
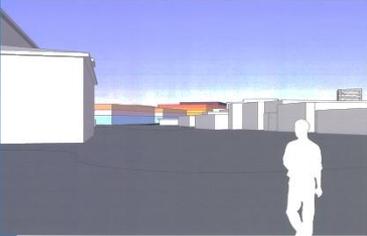
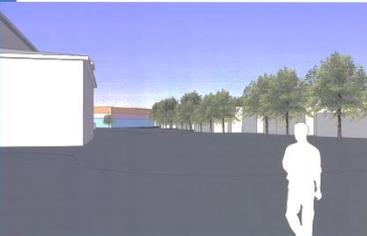
There is too much visual impact; the buildings should be significantly lower than shown here.



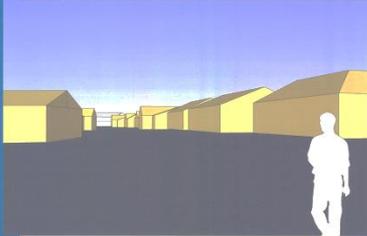
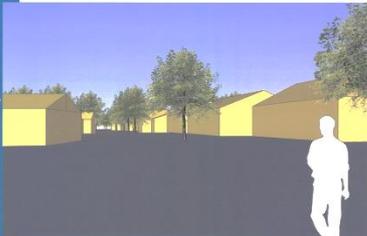
Community Feedback – Southeast Quadrant (Green)

Viewshed Analysis- Southeast Quadrant

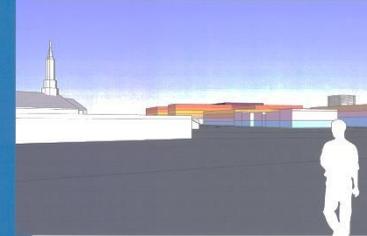
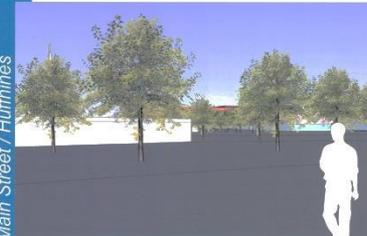
Location 4 - Main Street

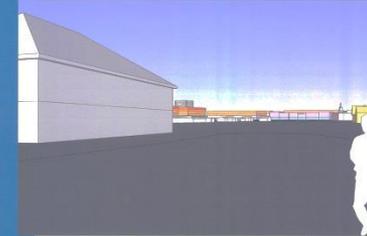
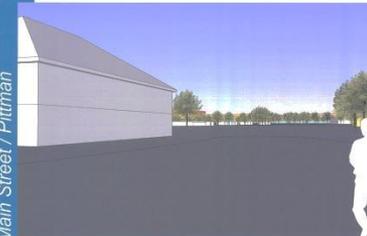
Location 5 - Main Street / Betty

Location 6 - Main Street / Huffhines

Location 7 - Main Street / Pittman

Location 4 - Main Street

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

| | | | | |
|--|---|--|---|---|
| The visual impact of taller buildings would be acceptable to me. | This visual impact is acceptable to me. | Trees and landscaping can address my concerns. | The buildings should be somewhat lower than shown here. | There is too much visual impact; the buildings should be significantly lower than shown here. |
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Location 5 - Main Street / Betty

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

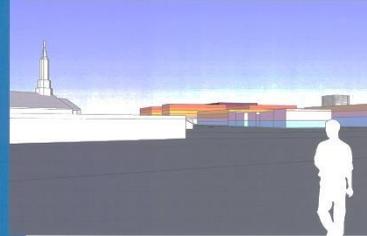
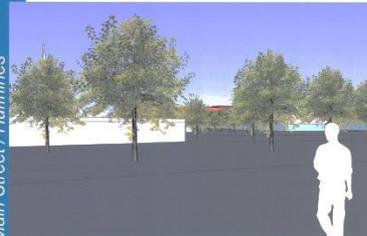
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May 14, 2014

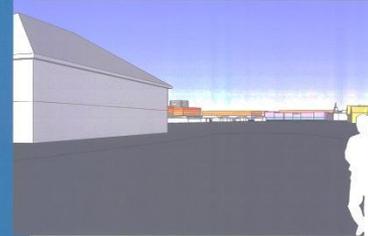
MAIN STREET / CENTRAL - REZONING INITIATIVE  **JACOBS**
Kimley+Horn
Richardson, Texas

Viewshed Analysis- Southeast Quadrant

Location 6 - Main Street / Huffhines

Location 7 - Main Street / Pittman


Location 6 - Main Street / Huffhines

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

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Location 7 - Main Street / Pittman

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

| | | | | |
|--|---|--|---|---|
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Location 7 - Main Street / Pittman

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

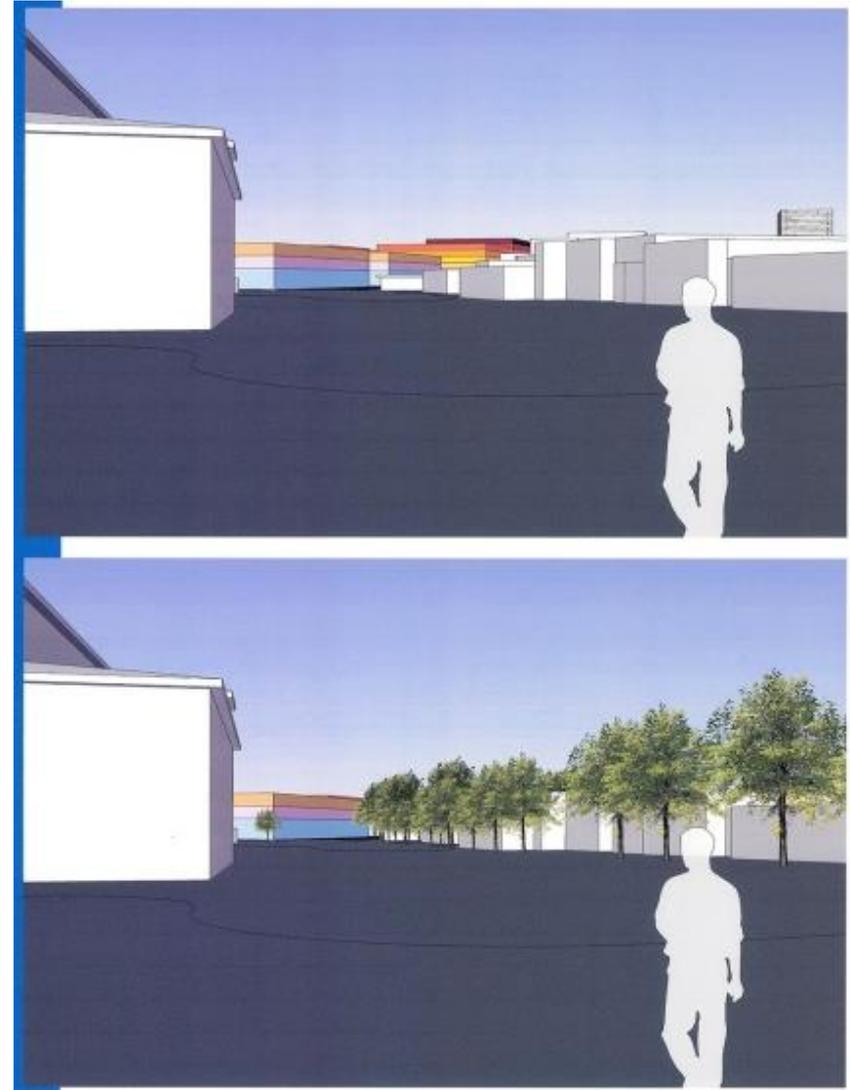
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May 14, 2014

MAIN STREET / CENTRAL - REZONING INITIATIVE  **JACOBS**
Kimley+Horn
Richardson, Texas

Recommendation – Southeast Quadrant (Green)

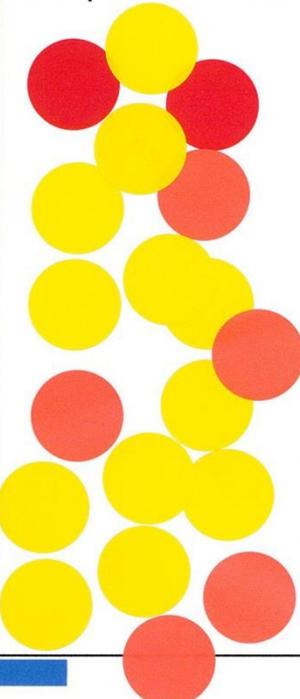
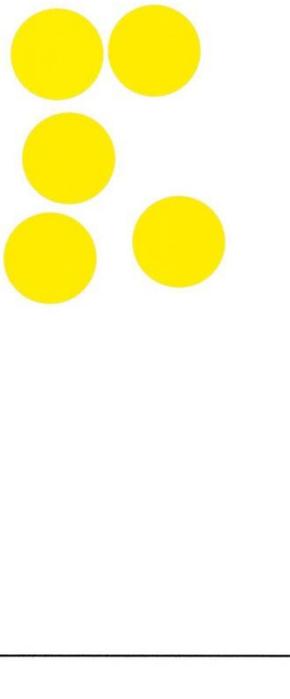
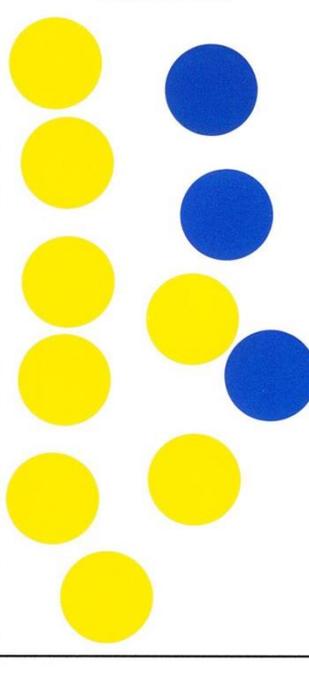
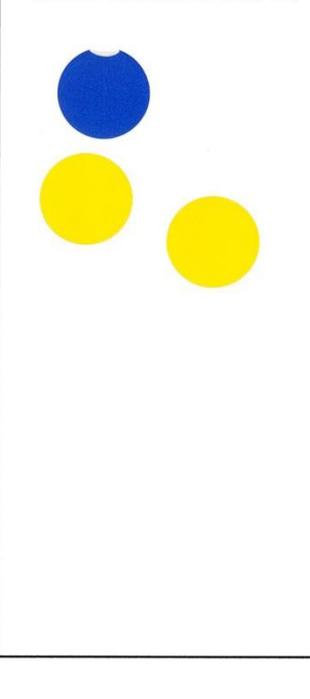
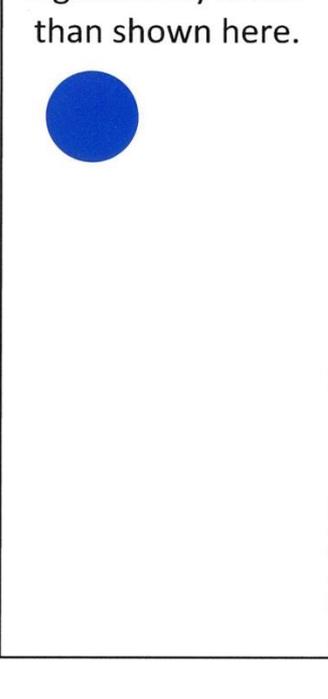
- One respondent living within ¼ mile of this quadrant indicated a preference for somewhat lower buildings
- More respondents living within ¼ mile of this quadrant indicated that the building heights indicated were acceptable, or that taller buildings could be acceptable and that landscaping could address their concerns
- ***Recommendation – No change to building heights in the southeast quadrant from those indicated in the model***



Community Feedback – Southwest Quadrant (Blue)

Location 11

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

| | | | | |
|--|---|---|---|---|
| <p>The visual impact of taller buildings would be acceptable to me.</p>  | <p>This visual impact is acceptable to me.</p>  | <p>Trees and landscaping can address my concerns.</p>  | <p>The buildings should be somewhat lower than shown here.</p>  | <p>There is too much visual impact; the buildings should be significantly lower than shown here.</p>  |
|--|---|---|---|---|



Community Feedback – Southwest Quadrant (Blue)

Viewshed Analysis- Southwest Quadrant

Location 8 - Central / Nottingham

Location 8 - Central / Nottingham

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

| | | | | |
|--|---|--|---|---|
| The visual impact of taller buildings would be acceptable to me. | This visual impact is acceptable to me. | Trees and landscaping can address my concerns. | The buildings should be somewhat lower than shown here. | There is too much visual impact; the buildings should be significantly lower than shown here. |
| 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots |

Location 9 - Belt Line / Nottingham

Location 9 - Belt Line / Nottingham

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

| | | | | |
|--|---|--|---|---|
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| 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots |

Viewshed Analysis- Southwest Quadrant

Location 10 - Central / Downing

Location 10 - Central / Downing

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

| | | | | |
|--|---|--|---|---|
| The visual impact of taller buildings would be acceptable to me. | This visual impact is acceptable to me. | Trees and landscaping can address my concerns. | The buildings should be somewhat lower than shown here. | There is too much visual impact; the buildings should be significantly lower than shown here. |
| 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots |

Location 11 - Belt Line / Downing

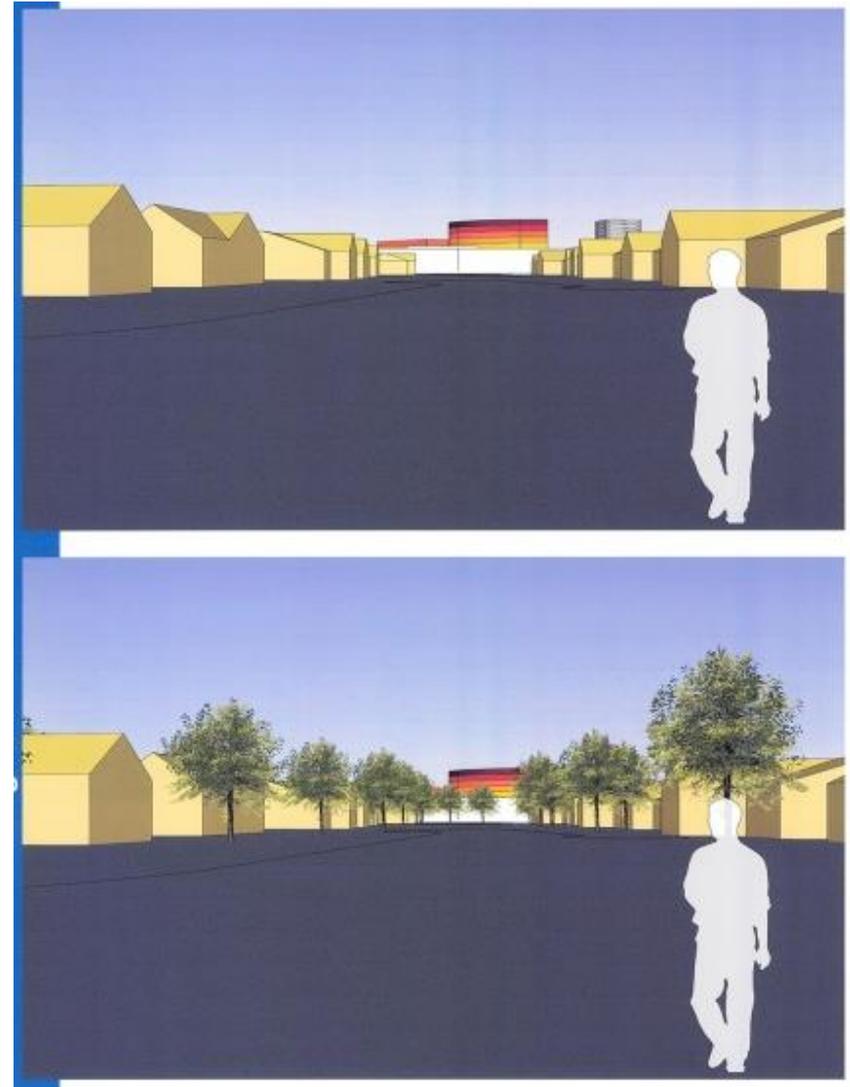
Location 11 - Belt Line / Downing

What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image?

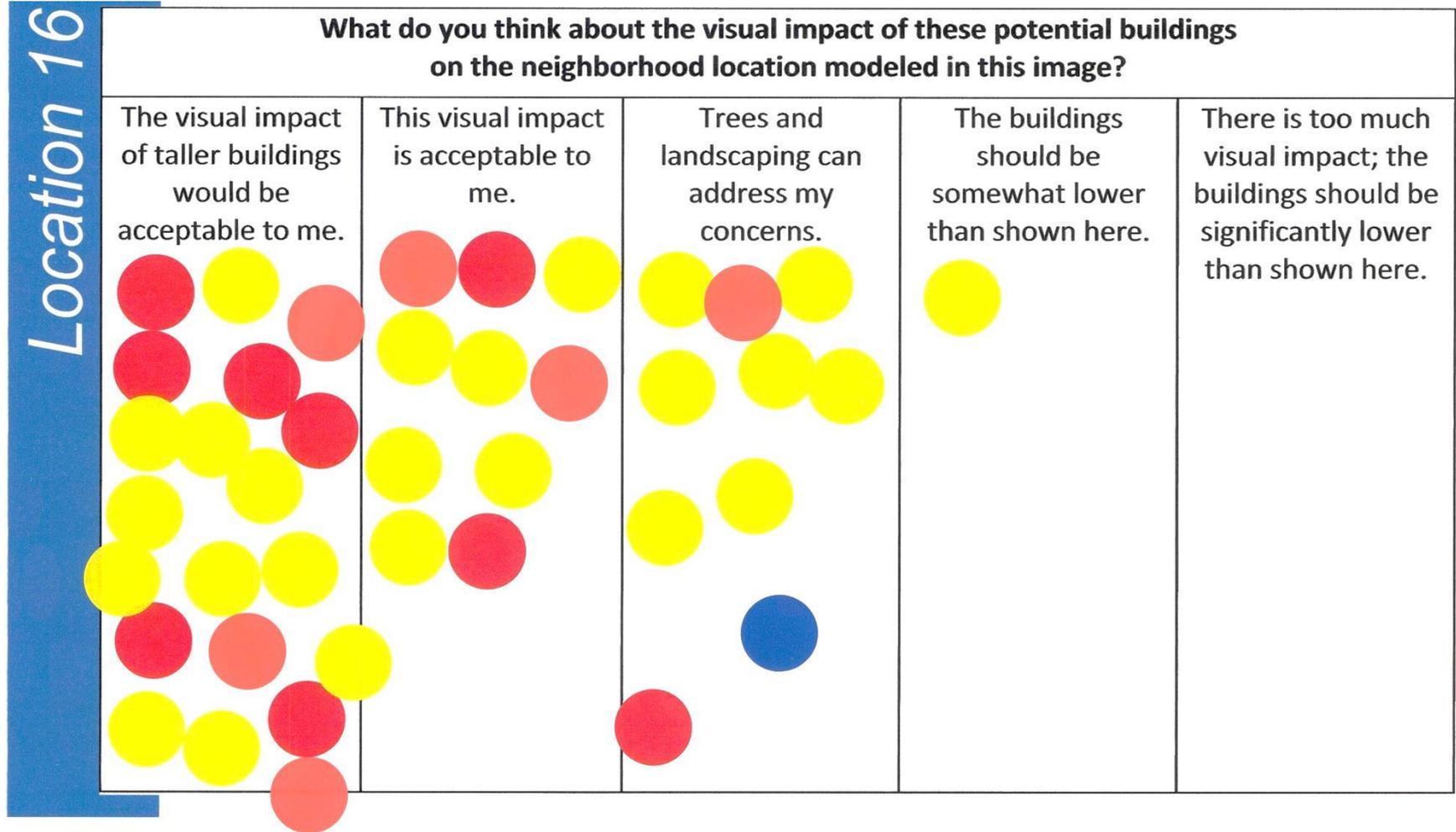
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| 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots | 10 yellow dots |

Recommendation – Southwest Quadrant (*Blue*)

- Several respondents living within ¼ mile of this quadrant indicated a preference for somewhat or significantly lower buildings
- One respondent living within ¼ mile of this quadrant indicated that the building heights indicated were acceptable
- ***Recommendation – Reduce the maximum height for buildings in the southwest quadrant to 75' (6 stories)***



Community Feedback – Northwest Quadrant (Red)

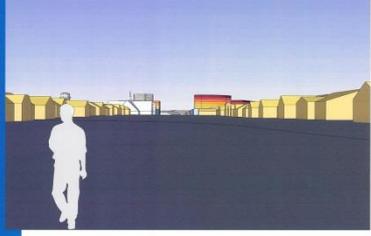


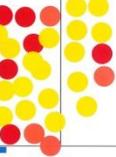
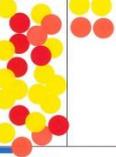
Community Feedback – Northwest Quadrant (Red)

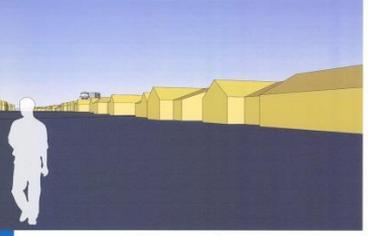
Viewshed Analysis- Northwest Quadrant

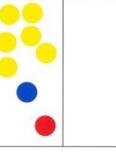
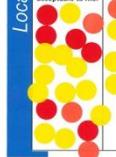
Location 14 - Belt Line

Location 15 - Belt Line / Westwood


| What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image? | | | |
|--|---|---|---|
| The visual impact of taller buildings would be acceptable to me. | This visual impact is acceptable to me. | Trees and landscaping can address my concerns. | The buildings should be somewhat lower than shown here. |
|  |  |  |  |


| What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image? | | | |
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Location 14 - Belt Line

Location 15 - Belt Line / Westwood

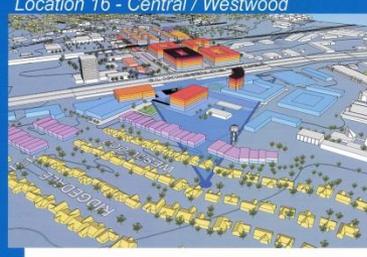
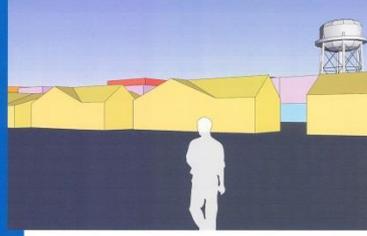
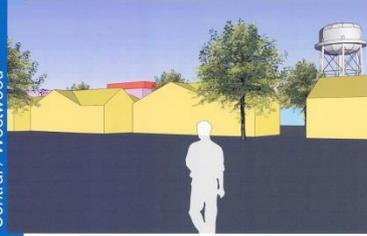
MAIN STREET / CENTRAL - REZONING INITIATIVE

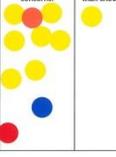
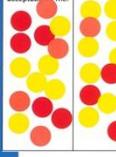
JACOBS
 Kimley+Horn
 Richardson, Texas

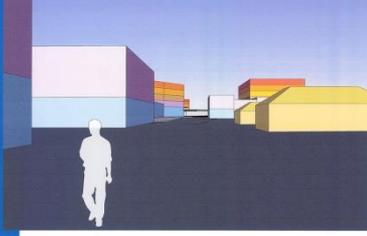
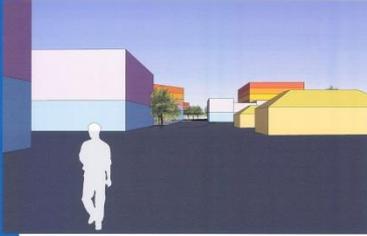
Viewshed Analysis- Northwest Quadrant

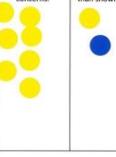
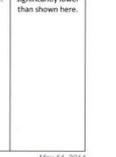
Location 16 - Central / Westwood

Location 17 - Belt Line / Custer

| What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image? | | | |
|--|---|---|---|
| The visual impact of taller buildings would be acceptable to me. | This visual impact is acceptable to me. | Trees and landscaping can address my concerns. | The buildings should be somewhat lower than shown here. |
|  |  |  |  |

| What do you think about the visual impact of these potential buildings on the neighborhood location modeled in this image? | | | |
|--|---|---|---|
| The visual impact of taller buildings would be acceptable to me. | This visual impact is acceptable to me. | Trees and landscaping can address my concerns. | The buildings should be somewhat lower than shown here. |
|  |  |  |  |

Location 16 - Central / Westwood

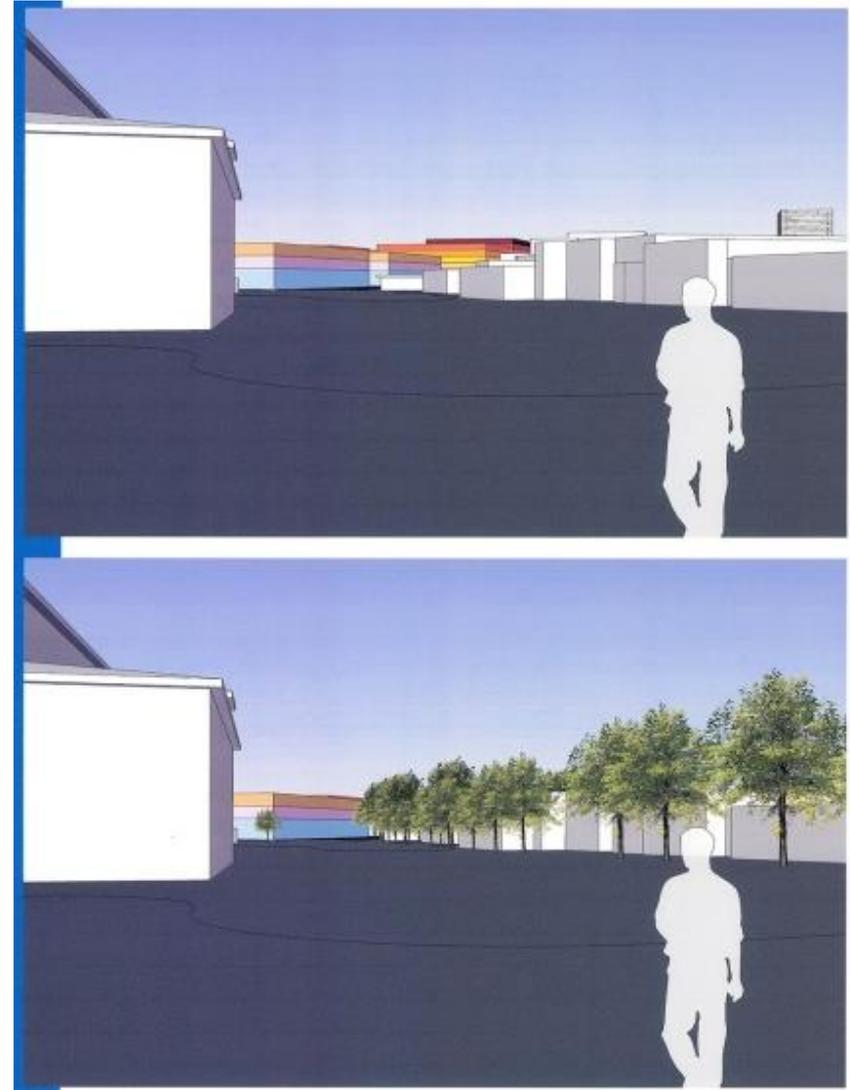
Location 17 - Belt Line / Custer

MAIN STREET / CENTRAL - REZONING INITIATIVE

JACOBS
 Kimley+Horn
 Richardson, Texas

Recommendation – Northwest Quadrant (*Red*)

- One respondent living within $\frac{1}{4}$ mile of this quadrant indicated a preference for somewhat lower buildings
- Most respondents living within $\frac{1}{4}$ mile of this quadrant indicated that trees and landscaping could address their concerns related to the building heights modeled
- ***Recommendation – No change to building heights in the northwest quadrant from those indicated in the model***



Discussion

Additional Feedback from Community Workshop

- One individual at the community workshop requested that views be taken from back yards in the southwest quadrant adjacent to The Heights Shopping Center to see if there were additional viewshed impacts from new development
- The following views are taken from those locations

Location 20 – Belt Line/ Lindale



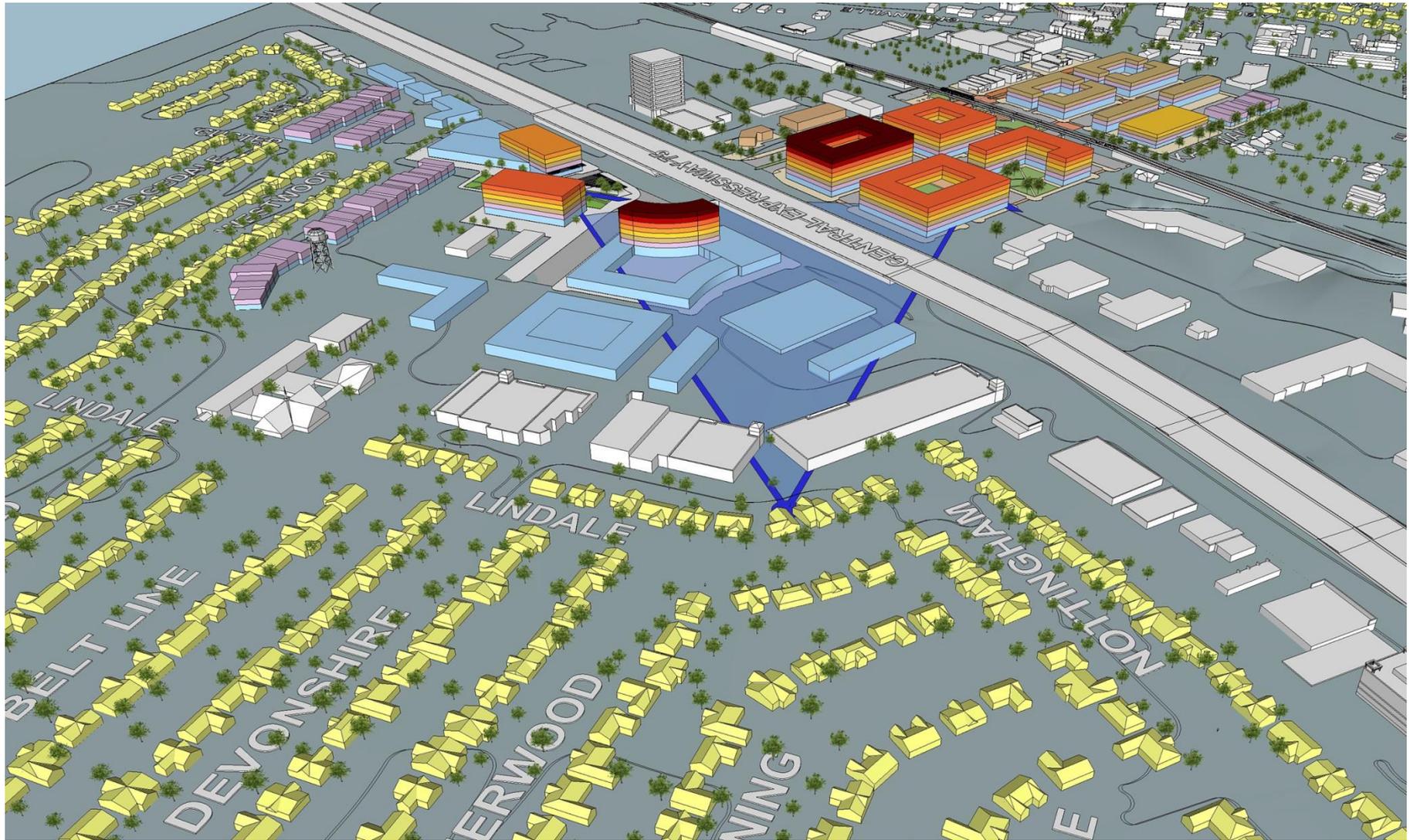
Location 20 – Belt Line/ Lindale



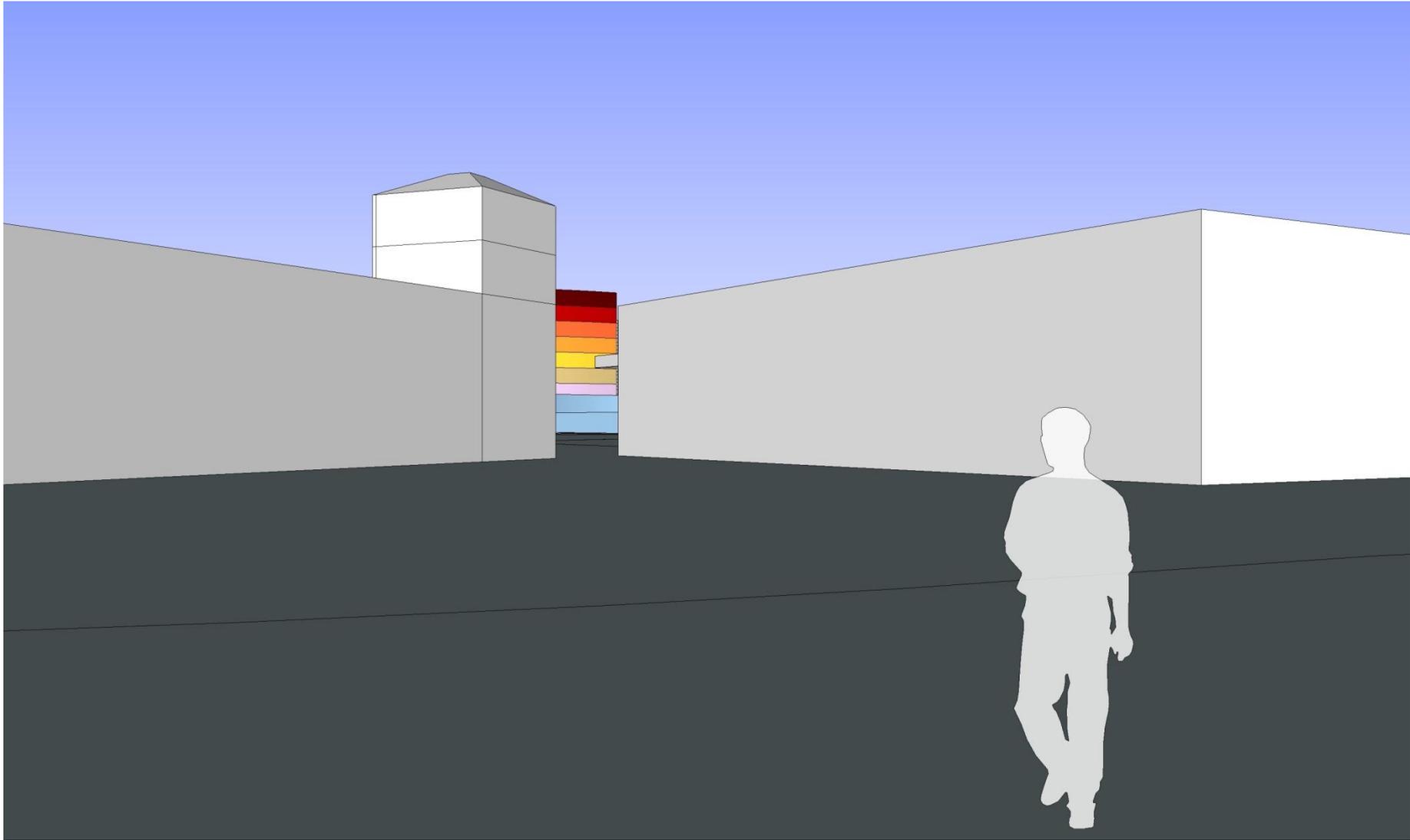
Location 20 – Belt Line/ Lindale



Location 20 – Belt Line/ Lindale



Location 21 – Belt Line / Lindale



Location 21 – Belt Line / Lindale



Additional Council Requested Views

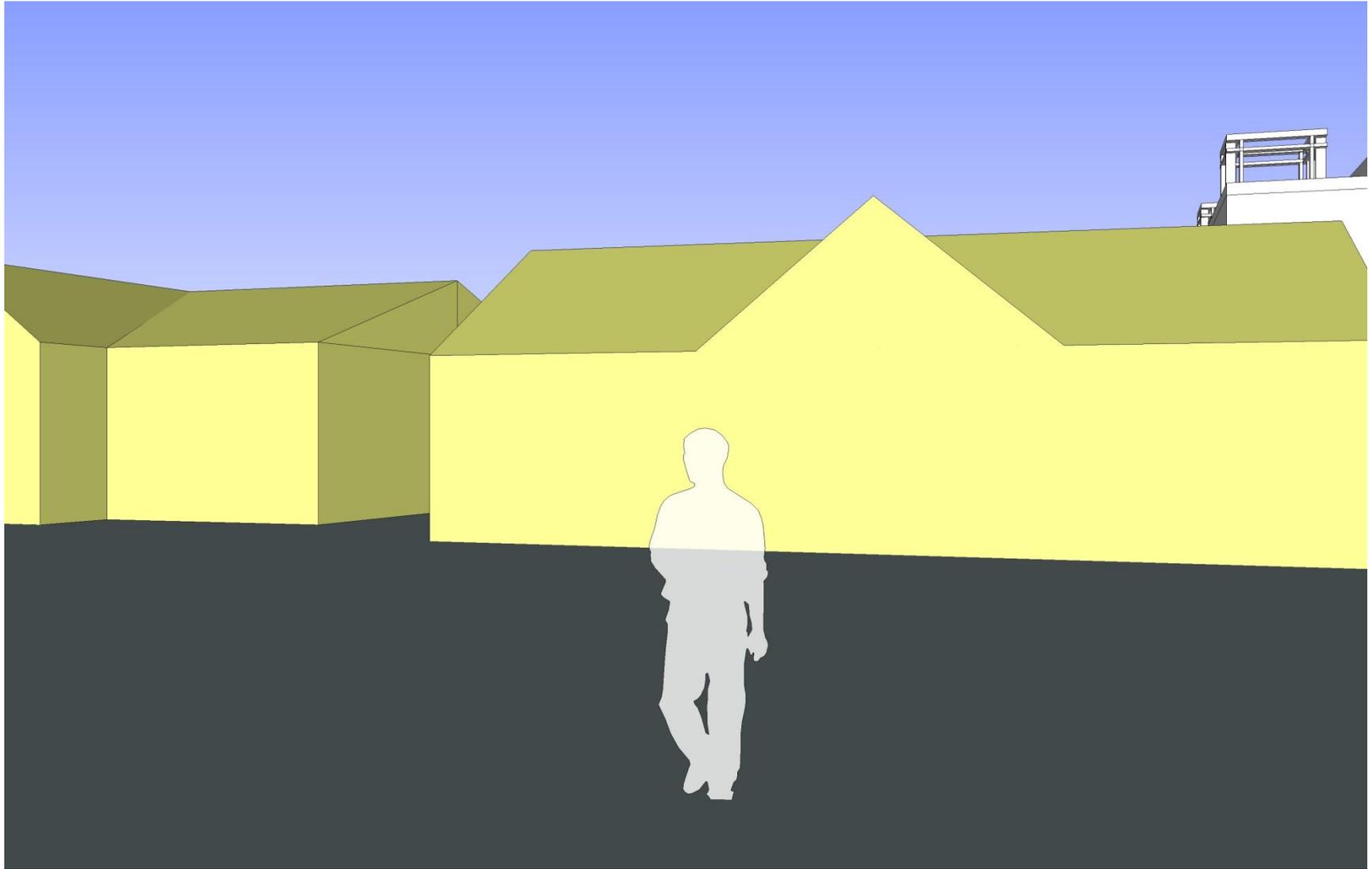
- In the City Council briefing on March 17, the Council requested additional views related to specific locations in the Corridor
- The following views are taken from those locations

Location 8 – Central / Nottingham



MAIN STREET / CENTRAL - REZONING INITIATIVE

Location 8 – Central / Nottingham



Location 8 – Central / Nottingham

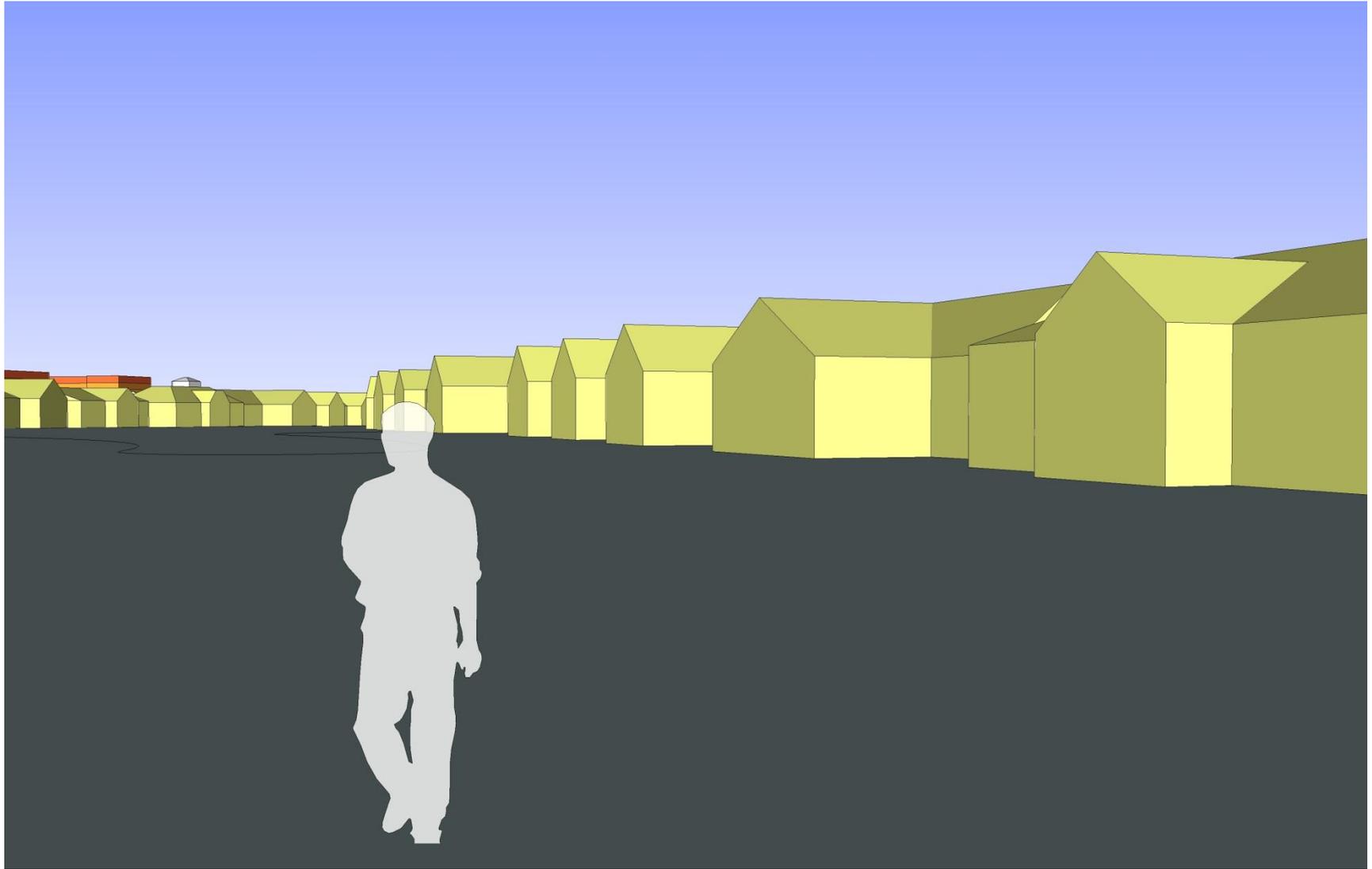


Location 10 – Central / Downing



MAIN STREET / CENTRAL - REZONING INITIATIVE

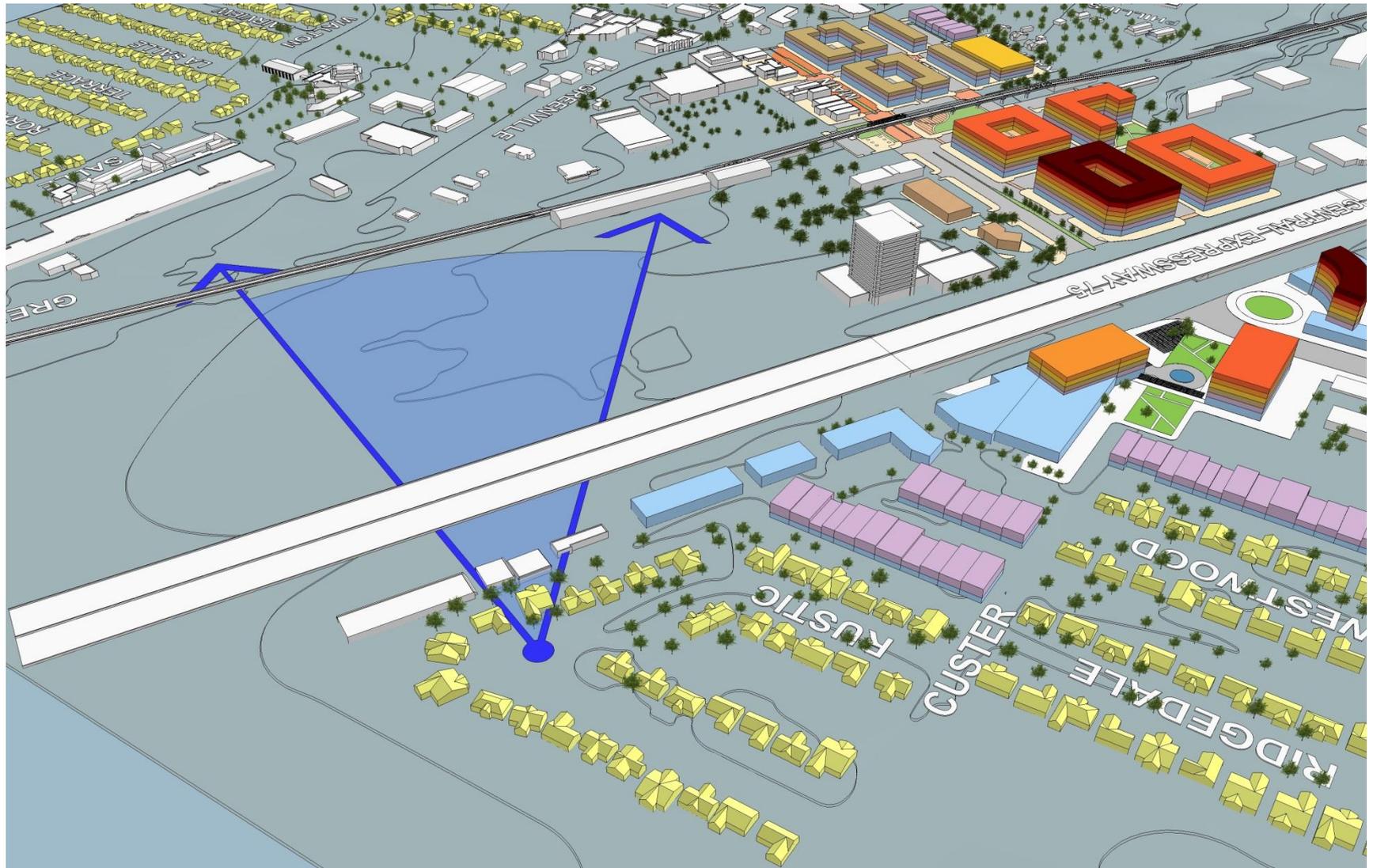
Location 10 – Central / Downing



Location 10 – Central / Downing

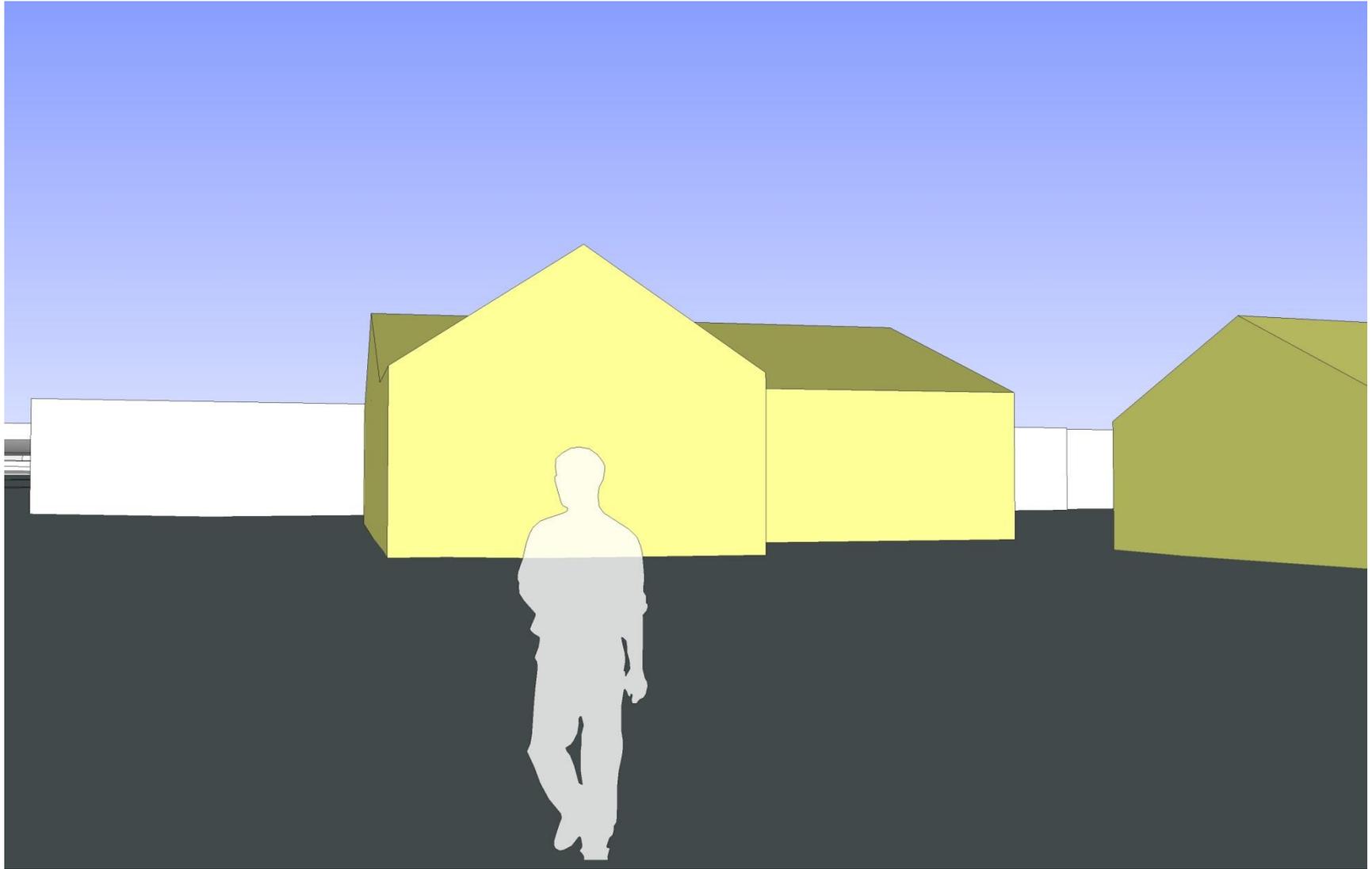


Location 19 – Central / Rustic



MAIN STREET / CENTRAL - REZONING INITIATIVE

Location 19 – Central / Rustic



Location 19 – Central / Rustic

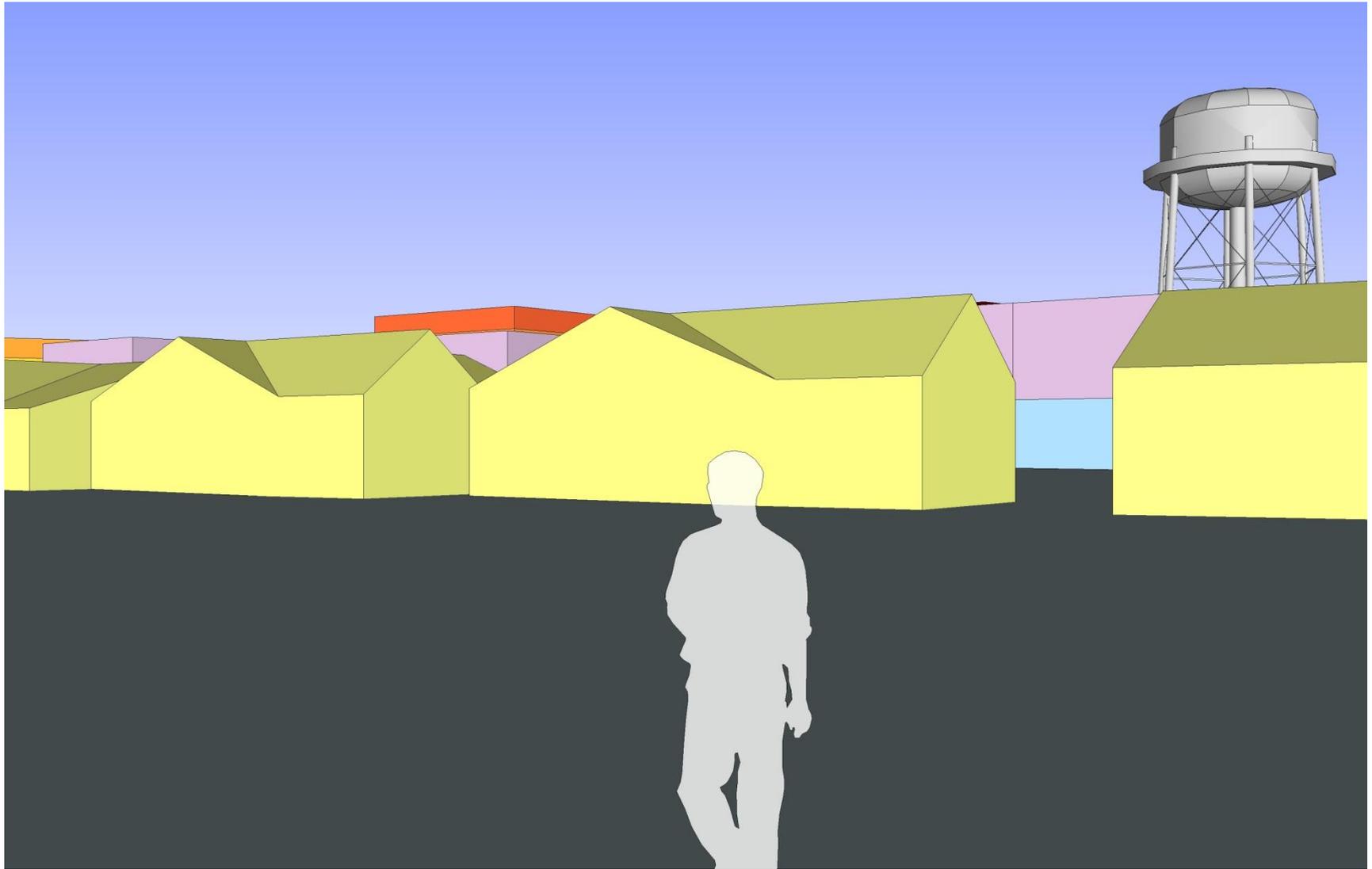


Location 16 – Central / Westwood



MAIN STREET / CENTRAL - REZONING INITIATIVE

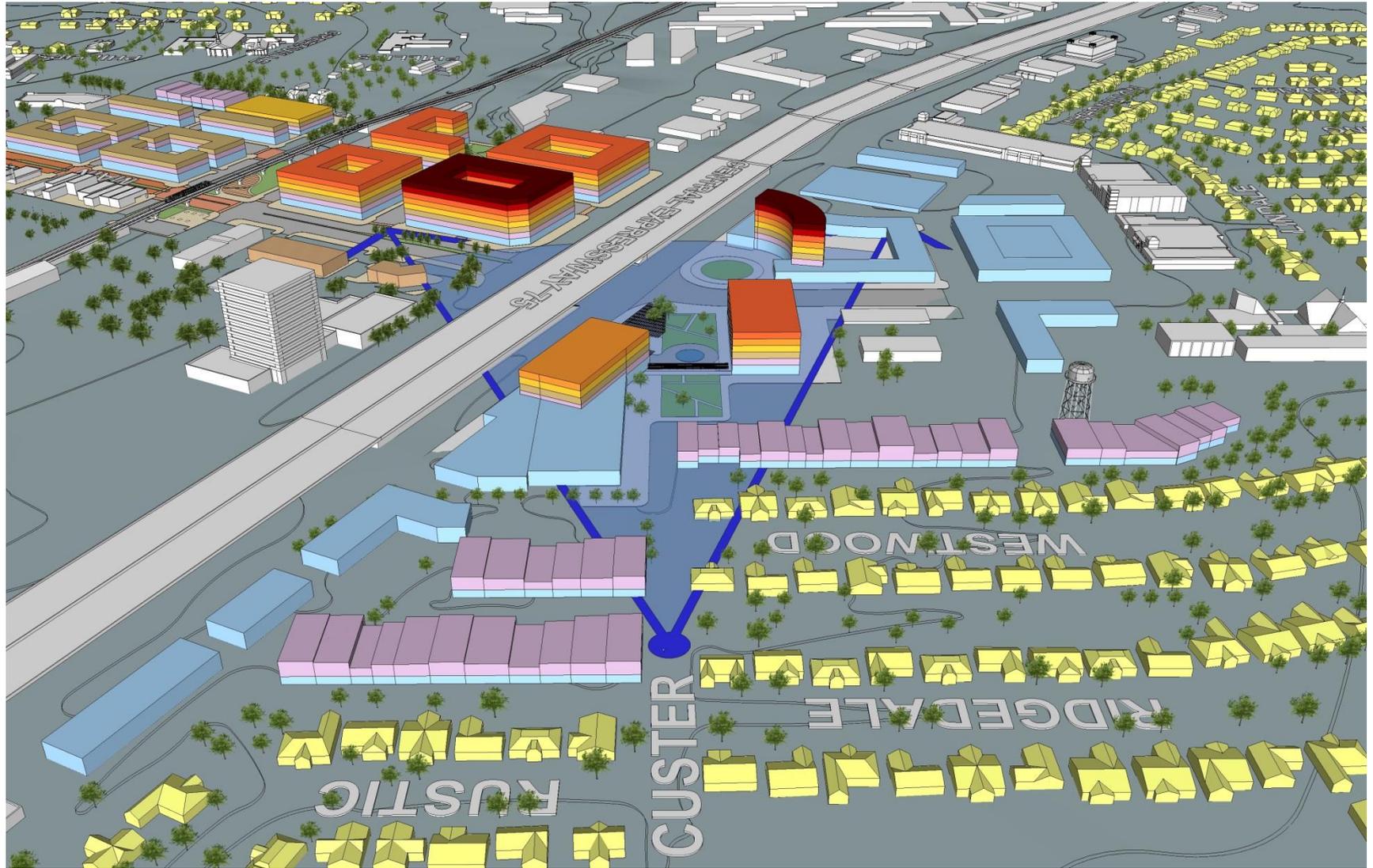
Location 16 – Central / Westwood



Location 16 – Central / Westwood

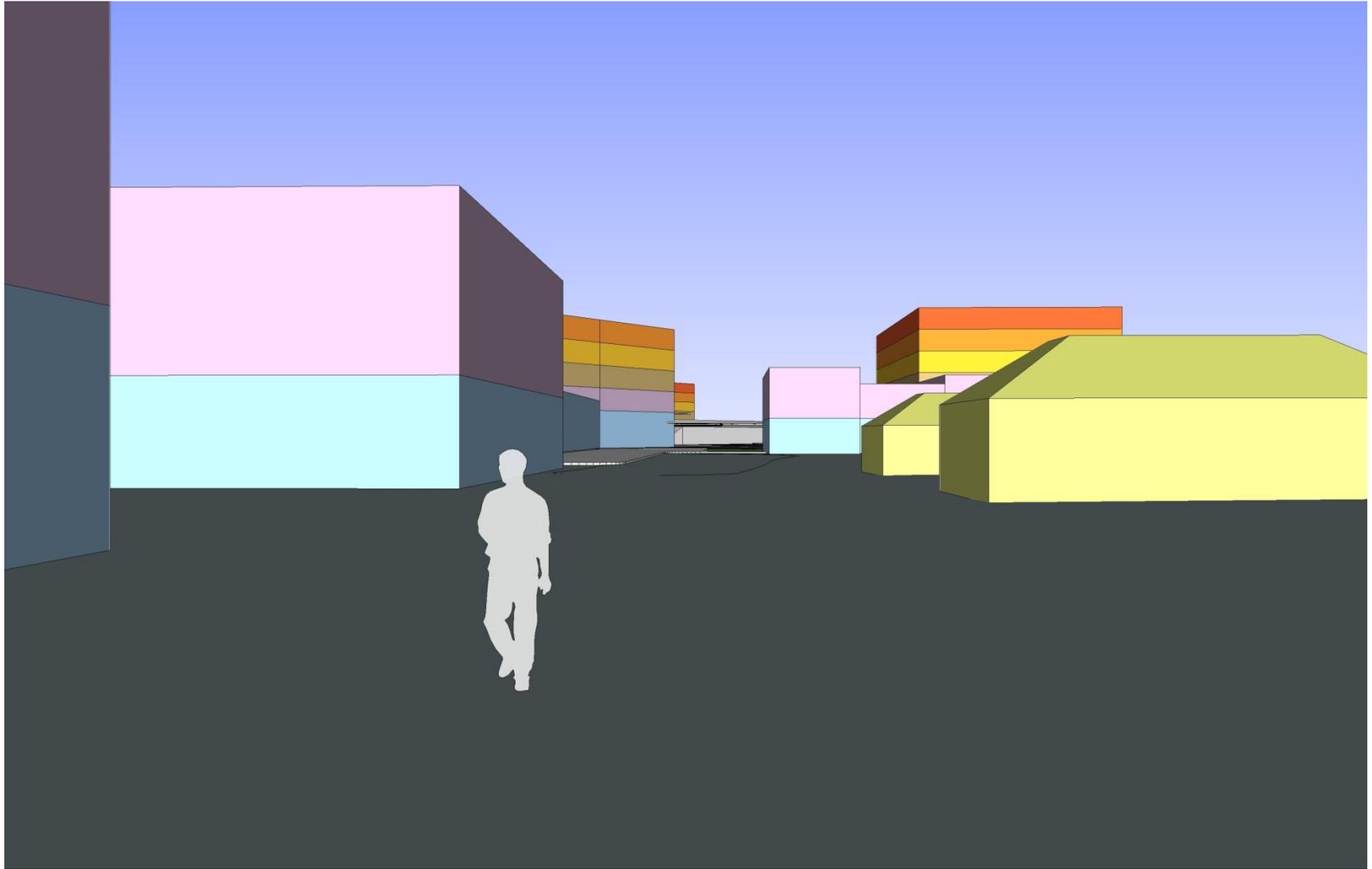


Location 17 – Belt Line / Custer



MAIN STREET / CENTRAL - REZONING INITIATIVE

Location 17 – Belt Line / Custer



Location 17 – Belt Line / Custer



Main Street Design Components

Main Street Design Components

- The design of Main Street is proceeding based upon the feedback received from Council at the 3/17/14 worksession
- Several elements will be important to the future design of Main Street
- The following slides summarize some of the key design components to be considered



Main Street Design Components - Parking



Main Street Design Components - Parking



Main Street Design Components - Parking



Main Street Design Components - Parking



MAIN STREET / CENTRAL - REZONING INITIATIVE

Main Street Design Components – Medians / Turn Lanes



MAIN STREET / CENTRAL - REZONING INITIATIVE

Main Street Design Components – Medians / Turn Lanes



Main Street Design Components – Medians / Turn Lanes



Main Street Design Components – Medians / Turn Lanes



MAIN STREET / CENTRAL - REZONING INITIATIVE

Main Street Design Components – Amenity Zone



Main Street Design Components – Amenity Zone



Main Street Design Components – Amenity Zone



Main Street Design Components – Amenity Zone



Next Steps

Next Steps

- Based upon Council feedback, the Team will prepare alternative Main Street cross sections, and will prepare draft zoning documents for the four subdistricts for stakeholder and community discussions
- The consultant team will brief Council regarding the Main Street cross sections in June / July
- The consultant team will meet with property owners within the study area to discuss preliminary code direction and property owner desires in late July
- The team will then conduct a community-wide meeting in late July to present the preliminary code
- Staff will update Council in August on the feedback received in the community-wide meeting and property owner meetings held in July

City Council Work Session

June 2, 2014



Image Source – Richardson Public Library



MAIN STREET / CENTRAL - REZONING INITIATIVE

JACOBS
Kimley»Horn

Richardson, Texas

CITY OF RICHARDSON BUDGET METHODS AND FY 2014-2015 BUDGET CALENDAR

June 2, 2014



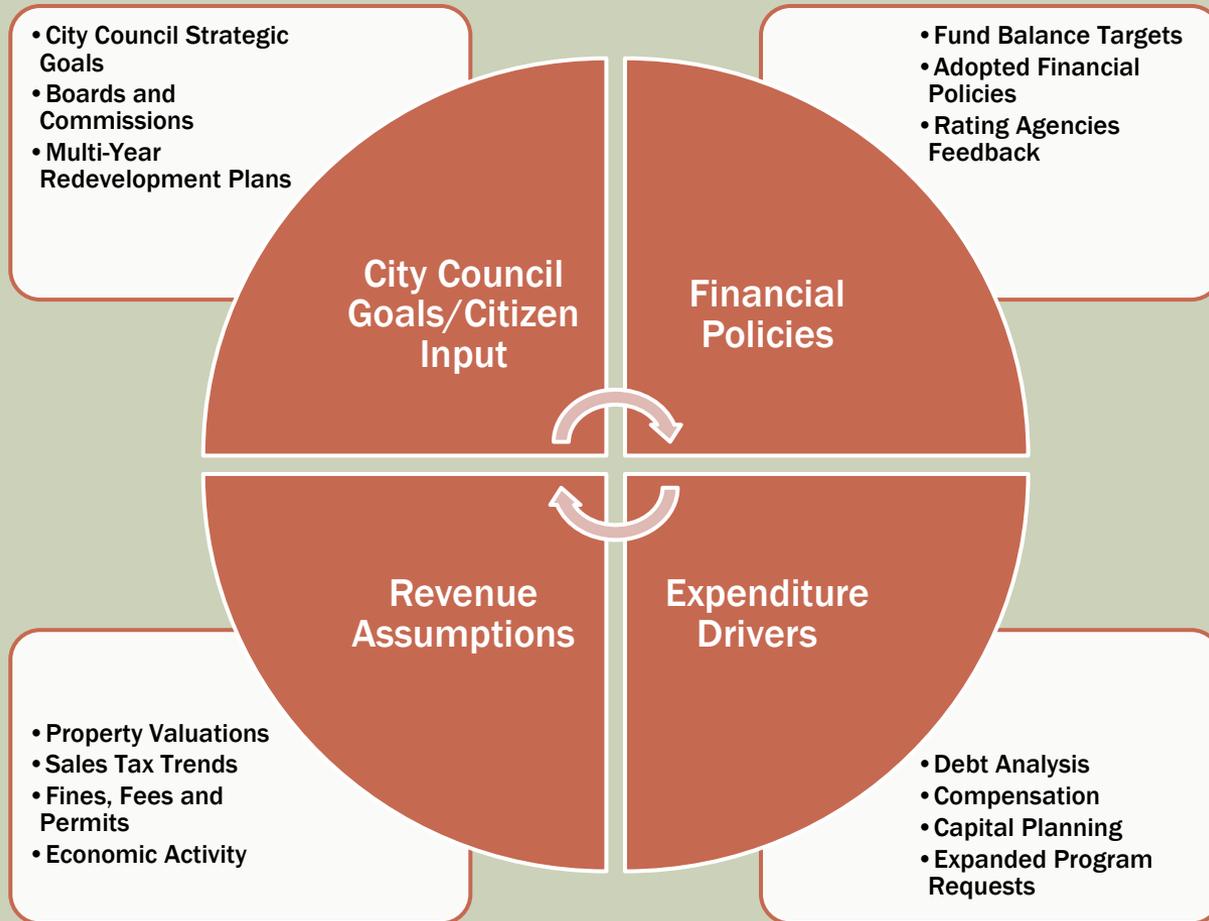
OVERVIEW OF TONIGHT'S PRESENTATION

- **Overview of the City's Budget Methods and Strategies**
 - Key Budget Principles
 - Budget Study Teams and Productivity/Service Initiatives
 - Emerging Themes for the 2014-2015 Budget
- **Review of the 2014-2015 Budget Calendar**

BUDGETING IS A CONSEQUENCE OF YEAR-LONG POLICY MAKING

- The development of the annual budget is a merging of decisions and initiatives that happen all year long.
 - The City is in a constant “input” state throughout the year with citizens through boards and commissions, meetings with HOA’s and key community partners
 - “State of Service” reports are provided throughout the year on key topics such as public safety, development activity, the Comprehensive Annual Financial Report, arts and others that provide an overview on departmental activities and trends
 - Stakeholder input is sought through strategic planning efforts, public meetings on projects/initiatives and public hearings on proposed developments

BUDGETING - “CONVERGENCE” OF KEY DECISIONS



“RESET TO ZERO”

- Each element of departmental budgets are “reset to zero” and reviewed and discussed each year.
 - Budgets do not start at current or prior year budget amount
 - “Resetting to zero” allow the City to take a fresh look at how the City approaches providing City services and guards against complacency
 - Departments have the flexibility to explore new ideas and discuss how they are responding to new trends
 - Revenue and expenditures assumptions are discussed and validated
 - New ideas from all levels of employees are not only welcomed, they are encouraged throughout the year
 - Collaboration with other departments is a necessity since they are key partners in service delivery to the citizens

BALANCED APPROACH TO BUDGETING

Multi-year plans help the City plan for the future without “spikes or dips”

Examples:

- Debt capacity analysis – planning projects to help maintain consistent debt expenses
- Equipment purchases – planning ahead for major equipment purchases (i.e. Fire vehicles, Solid Waste vehicles) to minimize fluctuations in expenses from year-to-year
- Street maintenance – multi-year effort to increase the amount of spending on street maintenance incrementally

BUDGET DEVELOPMENT OBJECTIVES

- The City of Richardson's budget development process conform to a variety of guidance features:
 - City Council Strategic Goals
 - State and Federal Laws
 - City Charter
 - City Financial & Investment Policies
 - Fund Accounting Standards
 - Bond Rating Criteria

CITY OF RICHARDSON FISCAL YEAR 2014-2015 BUDGET METHODS

■ Key Budget Principles:

- Serving our citizens is our top priority
- Alignment with City Council Strategic Goals – budgeting is a year-round discussion based on City Council priorities
- Importance of building upon the focus of “*Maintaining a Solid Foundation*” from the FY 2013-14 Budget and maintaining and reinvesting in our key infrastructure
- Need to plan for the future – reinvestment studies and infrastructure master plans lay the framework for future years

CITY OF RICHARDSON FISCAL YEAR 2014-2015 BUDGET METHODS

■ Key Budget Principles:

- Importance of understanding and analyzing revenue and expenditure drivers
 - Identifying the details of key revenue drivers
 - Identifying the details of key expenditure drivers
 - Historical analysis/trends of the economic drivers
 - Multi-year projections of the economic drivers
- “Know Your Numbers” – employees are expected to know and understand the services they provide and continually look for opportunities for innovation and improvement

ADDITIONAL ANALYSIS REQUESTED IN FY2014-2015 BUDGET SUBMISSIONS

■ **Cost Containment Goal**

- Departments are thoroughly examining current programs and process to identify meaningful ways of maintaining or enhancing services while containing escalating costs. This could include multi-year plans and phased implementation strategies
 - Re-engineering processes where possible
 - Examining all overtime expenses
 - Identifying redundant processes that could be combined or eliminated

■ **Optimizing Fees Goal**

- Departments are reviewing all of their fees
 - Are Richardson's fee comparable to benchmark cities?
 - Recommendations for modifying existing fees or charging new fees where appropriate

BUDGET STUDY TEAMS

- Key budget study items are identified by the City Manager and evaluated prior to next year's budget. Budget strategy teams are established for Budget Study Items. Their charge is to:
 - Evaluate service delivery methods
 - Provide analytical and logistical support throughout the process
- Budget study items are prioritized by key budget trends of expenditure/revenue drivers
- Analytical support includes examination of current service levels and the financial impact of these service levels, identification of options and cost estimates for options
- City Manager's Office reviews and discusses analysis and recommendations with the Budget Study Team and the department(s) and provides direction for next steps

BUDGET STUDY TEAMS – RECENT EXAMPLES

- **Solid Waste Services Study (2013):**
 - Established a baseline for existing solid waste services in Richardson
 - Benchmarked solid waste services and fees with other cities in the region
 - Performed a cost of services analysis that included:
 - Current expenses and revenues
 - Forecasted expenses and revenues
 - Identification of opportunities to increase cost-effectiveness
 - Evaluated potential solid waste system enhancements
 - Assessed if there opportunities to enhance customer services such as:
 - Curbside residential recycling
 - Construction and demolition debris collection
 - Commercial and multi-family recycling collection

BUDGET STUDY TEAMS – RECENT EXAMPLES

■ Fire EMS Services (2014):

- What is the demand for EMS services? (historical analysis, geographic analysis, analysis of call data by day or the week and hour)
- What Fire Department resources are currently available? (staffing, fire station space, equipment)
- What resources are needed to meet current and future demand? (What is the impact of CityLine and UTD expansion on service levels?)
- What are options for meeting this demand? (full-time service, peak time service, multi-year implementation strategy options)
- What are the cost estimates and timelines for each of these options? (initial expenses, capital expenses, recurring expenses)

EXAMPLES OF PRODUCTIVITY/SERVICE EFFICIENCIES INITIATIVES INCORPORATED IN BUDGETS

- Police went to hand-held ticket writers in 2005 allowing Municipal Court to reduce data entry from 2 part-time employees to one part-time employee. Estimated savings since 2005: \$92,225
- Parks and Recreation Guide is now printed and distributed with *Richardson Today*. Estimated annual savings: \$50,000
- Solid Waste will be implementing scales and GPS units in their vehicles in 2014 to improve route efficiencies. Estimated savings: Anticipate seeing a Return on Investment with 2.5 months of implementation
- Building Inspection is using third party inspection services to assist with a recent increase in commercial and multi-family development without adding permanent employees. Estimated savings for a three year period: \$144,000
- Facilities Services realigned staffing schedules to provide Civic Center custodial support on Sunday's without overtime. Estimated annual savings: \$10,000
- Streets can acquire equipment to eliminate water pockets on City streets and provide this service internally at half the cost of using a private contractor. Estimated annual savings: \$50,000

EMERGING THEMES OF THE FY 2014-2015 BUDGET

- **Commitment to Increased Maintenance**
 - 2 pennies dedicated to Street Maintenance
 - Year 2 Strategies for Key Maintenance Activities
 - Maintenance for City Facilities
- **Senior Tax Exemption Increasing from \$55,000 to \$60,000 to maintain the 30% goal**
- **Economic Development “Tool Box” Strategies**
- **Strategic Approaches to Responding to Increased Development Activity: Along with the privilege of growth comes increased increments of services/responsibilities**
- **Reinvestment Strategies – Main Street/Belt Line Study**
- **Employee Compensation and Benefits**

BUDGET TRANSPARENCY AND VALIDATION

- Transparency is Important throughout the Budget Process
 - City Council worksessions and the City Council Budget Retreat are posted as public meetings and are available as a live stream or as video on demand
 - Copies of the proposed budget are provided on the website as well as at City Hall and the Library
 - Public hearings are held at two different dates in August
 - Highlights from the adopted budget are featured in the October edition of *Richardson Today*
- Validation of the Budget Process
 - The City of Richardson has received an award from the Government Finance Officers Association for an outstanding budget document for 15 consecutive years
 - Both Moody's and Standard and Poor's have affirmed the quality of budget methods and decisions to being integral to the City's overall financial standing

FISCAL YEAR 2014-2015 BUDGET CALENDAR

| Timeline | Focus |
|------------------------------------|--|
| March | 2014-2015 Budget Goals discussed |
| March - Early May | Departments work on proposed budget with City Manager's Office and Budget Office |
| Friday, May 9, 2014 | Departmental requests due to Budget Office |
| May 20-June 6, 2014 | Departmental budget meetings |
| Tues. July 15 - Wed. July 16, 2014 | City Council Budget Retreat |
| Wed. July 25, 2014 | Certified tax rolls received |
| Mon. August 4, 2014 | Discuss tax rate, set public hearings on tax rate and take record vote on tax rate |
| Fri. August 8, 2014 | City Manager files proposed budget |
| Mon. August 11, 2014 | City Manager presents his Budget to the City Council |
| Mon. August 18, 2014 | 1st Public Hearing on the Proposed 2014-2015 Budget |
| Mon. August 25, 2014 | 2nd Public Hearing on the Proposed 2014-2015 Budget |
| Mon. September 8, 2014 | Budget Adoption |

Discussion/Comments



Executive Summary

Preliminary 2014-2015 Tax Roll

June 2, 2014

Background:

- The City of Richardson is served by two county appraisal districts providing their respective portions of the city's appraisal information. The Dallas Central Appraisal District (DCAD) represents approximately 62% of the value and the Central Appraisal District of Collin County (CCAD) represents approximately 38%.
- The City recently received the 2014 DCAD and CCAD preliminary tax rolls and is now able to summarize a total preliminary evaluation.
- These values represent the values as of this past January 1, 2014 – the benchmark status date for this annual effort.
- The preliminary rolls are presented differently for each of the appraisal districts.
 - DCAD - provides the value that is in their system as of May 15, 2014. This value then changes throughout the summer as the appraisal review board hears protests and as late renderings are received for business personal property, etc.
 - CCAD - provides a forecasted estimated value of what they believe the value will be on the July 25th certification date.

Preliminary Value Analysis:

- When we combine the information for both appraisal districts, the following first summaries are provided:

| | 2014 | | 2013 | | DIFFERENCE | PERCENT |
|------|--------------------------|-----------|------------------------|-----------|--------------------|----------------|
| | PRELIMINARY | | CERTIFIED FINAL | | | |
| CCAD | \$ 4,410,000,000 | \$ | 4,069,117,071 | \$ | 340,882,929 | 8.38% |
| DCAD | \$ 7,239,112,562 | \$ | 6,638,294,619 | \$ | 600,817,943 | 9.05% |
| | \$ 11,649,112,562 | \$ | 10,707,411,690 | \$ | 941,700,872 | 8.79% |

- With the expected property owner's review, and opportunity to protest their appraisal to the Review Boards, reduced values from these preliminary values are expected. For the current year, the following was experienced:

| | 2013 | | 2013 | | DIFFERENCE | PERCENT |
|------|--------------------------|-----------|------------------------|-----------|---------------------|----------------|
| | PRELIMINARY | | CERTIFIED FINAL | | | |
| CCAD | \$ 3,873,300,000 | \$ | 4,069,117,071 | \$ | 195,817,071 | 5.06% |
| DCAD | \$ 6,878,272,876 | \$ | 6,638,294,619 | \$ | (239,978,257) | -3.49% |
| | \$ 10,751,572,876 | \$ | 10,707,411,690 | \$ | (44,161,186) | -0.41% |

- The City will review periodic updates to these preliminary values from DCAD and CCAD as reviews occur over the next two months.

- Using a 5 year history of these adjustments, the following is a **very informal** forecast of what an average of the 5 years of bi-weekly adjustments **may** produce as a final 2014 Certified roll:

Preliminary to Certified Forecast: Five-year Adjustment history method

| 2014 EVR DATE | 2014 TAXABLE VALUE | 2014 Gain/Loss Estimate (5-yr average) |
|--|--------------------------|---|
| 4/30 | \$ 4,410,000,000 | |
| 5/15 | <u>7,239,112,562</u> | |
| | 11,649,112,562 | |
| 2 | 4,410,000,000 | |
| | 7,252,923,673 | |
| | <u>11,662,923,673</u> | 13,811,111 |
| | | 13,811,111 |
| 3 | 4,410,000,000 | |
| | 7,214,107,784 | |
| | <u>11,624,107,784</u> | (38,815,889) |
| | | (38,815,889) |
| 4 | 4,410,000,000 | |
| | 7,157,201,064 | |
| | <u>11,567,201,064</u> | (59,906,719) |
| | | (59,906,719) |
| 5 | 4,410,000,000 | |
| | 7,016,914,611 | |
| | <u>11,426,914,611</u> | (140,286,453) |
| | | (140,286,453) |
| Certified Estimate | 4,410,000,000 | -- |
| Certified Estimate | <u>6,975,118,887</u> | (41,795,724) |
| | \$ 11,385,118,887 | (41,795,724) |
| | \$ 11,385,118,887 | (263,993,675) |
| 6.3% Change from 2013 Cert. Val. | | |
| -2.3% Change from 2014 Prelim. Val. | | |

(Estimates are in bold)

- This 6.3% increase from last year's certified roll would represent the fourth increase in the last five years.
- Ultimate growth in General Fund will be lower due to growth in TIF Districts.

| Comparison to Previous Year Certified Roll: | | | |
|--|--------------------------|---------------------------|-------------------|
| Fiscal Year (Tax Year) | Taxable Value | Change from Prior Year | Percent Change |
| 2009/2010 (2009) | \$ 9,884,098,045 | | |
| 2010/2011 (2010) | 9,711,158,368 | \$ (172,939,677) | -1.70% |
| 2011/2012 (2011) | 9,746,482,430 | 35,324,062 | 0.40% |
| 2012/2013 (2012) | 10,079,565,561 | 333,083,131 | 3.40% |
| 2013/2014 (2013) | 10,707,411,690 | 627,846,129 | 6.20% |
| 2014/2015 (2014) | \$ 11,385,118,887 | \$ 677,707,197 | 6.30% |

- DCAD and CCAD provide summary reports by taxing entity. The DCAD detail sheets provide a summary by taxing entity for their Grand Total, and information on the three key components of those values: Commercial, Business Personal Property (BPP), and Residential. CCAD detail sheets do not reflect the three components, so only the Grand Total is reflected here.

DCAD Percent Change: 2013 Certified to 2014 Preliminary

| | Residential | Commercial | BPP | Grand Total |
|--------------------------|--------------------|-------------------|--------------|--------------------|
| Richardson | 4.03% | 16.33% | 7.35% | 9.05% |
| Dallas County | 6.49% | 18.09% | 8.02% | 11.10% |
| R.I.S.D. | 4.92% | 14.92% | 3.97% | 8.24% |
| Other Dallas Co. Cities: | | | | |
| Addison | 5.73% | 20.28% | 12.61% | 16.88% |
| Farmers Branch | 5.62% | 20.06% | 11.59% | 14.86% |
| Dallas | 7.02% | 19.09% | 4.76% | 11.49% |
| Irving | 6.74% | 17.00% | 5.79% | 11.25% |
| Carrollton | 4.28% | 15.72% | 8.74% | 10.67% |
| Dallas | 7.02% | 19.09% | 4.76% | 11.49% |
| Grand Prairie | 4.16% | 18.59% | 18.74% | 10.40% |
| Mesquite | 4.06% | 10.46% | 15.14% | 7.70% |
| Garland | 3.37 | 10.50% | 14.39% | 6.91% |

CCAD Percent Change: Supplemented September 2013 to Preliminary 2014

| | Residential | Commercial | BPP | Grand Total |
|--------------------------|--------------------|-------------------|------------|--------------------|
| Richardson | N/A | N/A | N/A | 7.23% |
| Collin County | N/A | N/A | N/A | 7.01% |
| P.I.S.D. | N/A | N/A | N/A | 5.67% |
| Other Collin Co. Cities: | | | | |
| McKinney | N/A | N/A | N/A | 9.57% |
| Frisco | N/A | N/A | N/A | 9.02% |
| Allen | N/A | N/A | N/A | 7.05% |
| Plano | N/A | N/A | N/A | 5.05% |

Summary:

- Staff will continue to note adjustments to the preliminary roll resulting from protest resolutions and any clerical adjustments as DCAD updates their records.
- As required by law, the Certified roll is due on Friday, July 25.

Executive Summary
Review of Over 65 & Disabled Person Exemption
June 2, 2014

Background:

- City’s Financial Policies provide that the City Council will review the exemption for Over 65 and disabled persons with a goal to maintain a tax benefit of approximately 30% of the average home value.
- There are currently 7,431 accounts that receive the exemption and the number of accounts historically has grown at about 3% per year on average.
- Senior Accounts make up 26.5% of the total number of Residential Accounts.
- Exemption has been \$55,000 since tax year 2008 (2008-2009 fiscal year).
- The current \$55,000 exemption and the current tax rate of \$0.63516/\$100 is worth \$349.34 to an individual.
- Each \$5,000 value increment is worth \$31.76 in taxes.
- Property values are expected to increase and staff is recommending increasing the exemption to \$60,000.
- An increase in the exemption must be approved before July 1, 2014 in order for it to be effective for the 2014-2015 fiscal year.

Over 65/Disabled Person Exemption Analysis

- **Average Individual Impact**

| | \$55,000 Exemption | | \$55,000 w/3% Value Growth | | \$60,000 Exemption | | \$60,000 w/3% Value Growth | |
|----------------------------|---------------------------|--------------|-----------------------------------|--------------|---------------------------|--------------|-----------------------------------|--------------|
| | <i>Value</i> | <i>Taxes</i> | <i>Value</i> | <i>Taxes</i> | <i>Value</i> | <i>Taxes</i> | <i>Value</i> | <i>Taxes</i> |
| Full Value (\$) | 180,265 | 1,145 | 185,673 | 1,179 | 180,265 | 1145 | 185,673 | 1,179 |
| Exempted Value (\$) | 125,265 | 796 | 130,673 | 830 | 120,265 | 764 | 125,673 | 798 |
| Exemption/Tax Savings (\$) | \$55,000 | 349 | 55,000 | 349 | 60,000 | 381 | 60,000 | 381 |
| Exemption % of Value | 30.51% | | 29.62% | | 33.28% | | 32.31% | |

- On average, seniors will be paying \$2 more with a 3% growth in property values and increasing the exemption to \$60,000.
- The average value of a senior’s home would have to increase by 11% before a \$60,000 exemption fell below the 30% financial policy goal.

- **City Impact**

| | 2013-2014 Accts | 60,000 Exemption No Acct Growth | | 60,000 3% Acct Growth | |
|--------------------|----------------------------|--|----------------|----------------------------------|----------------|
| # Accts | 7,431 - Base | 7,431 | Diff from Base | 7,654 | Diff from Base |
| Exemption Amt (\$) | 55,000 | 60,000 | 5,000 | 60,000 | 5,000 |
| Exempt Value (\$) | 408,705,000 | 445,860,000 | 37,155,000 | 459,240,000 | 50,535,000 |
| Gen Fund (\$) | 1,493,040 | 1,628,771 | 135,731 | 1,677,634 | 184,594 |
| Debt Svc (\$) | 1,102,891 | 1,203,153 | 100,263 | 1,239,248 | 136,358 |
| Total (\$) | 2,595,931 | 2,831,924 | 235,994 | 2,916,882 | 320,952 |

- For Fiscal Year 2013-2014 the exemption amounted to \$2,595,931.
- With a \$5,000 increase from \$55,000 to \$60,000 and 3% growth in the number of accounts that receive the exemption, the exemption will amount to \$2,916,882.

Recommendation:

- Property values are expected to grow more than 3%.
- At 3% property value growth, the current exemption amount of \$55,000 is expected to be just under the City Council's financial policy of maintaining the exemption at 30% of the average value of a senior's home.
- Staff recommends increasing the exemption to \$60,000. This increase will allow for a cushion in the 30% goal if values increase more than 3%.
- An ordinance can be placed on the June 9, agenda if the City Council approves of an increase in the exemption amount.



Charter Review Process

City of Richardson

Presentation Outline

- **Council Goals**
- **Rationale for Review**
- **Charter History**
- **Legal Requirements**
- **Eligible Election Dates**
- **Charter Amendments**
- **Recommendations**
- **Proposed Timeline**
- **Questions and Council Feedback**

2013-2015 City Council Goals

Enhance Governance – to evaluate and examine the tools that allow the government to be effective and efficient

- Develop a process for a Charter Review
- Conduct a Charter Review

Rationale for Review

- The City Charter should be reviewed and updated periodically
 - Due to changes in state law and the state constitution,
 - To clarify existing provisions as needed to avoid conflicting interpretations;
 - And to otherwise to make the Charter more user friendly.
- State law and the state constitution control when the City Charter is in conflict
- A general review for state law conflicts, inconsistencies, clarification, and grammatical errors has not been conducted with the previous Charter Amendment Elections

Charter History

- Home Rule Charter Adopted
 - June 23, 1956
- First Charter Study Commission Appointed
 - July 19, 1960
 - No Council Action
- Second Charter Study Commission Appointed
 - June 13, 1966
 - No Council Action
- Third Charter Study Commission Appointed
 - November 5, 1973
 - No Council Action

Charter Election History

First Charter Amendment Election - January 21, 1989

- Fourth Charter Commission Appointed September 28, 1987
- Amended Charter Approved

Second Charter Amendment Election – November 6, 2007

- 3 Proposed Amendments
 - Meeting Locations
 - Open Meetings
 - Term Limits
- Amended Charter Approved

Third Charter Amendment Election – November 6, 2012

- Citizen Petition for Amendments
 - Proposed Amendments all Related to the Direct Election of the Mayor
- Amended Charter Approved

Legal Requirements

- A Special Election is required to amend the Charter
- The City is only authorized to hold an election on a uniform election date
 - Second Saturday in May of an odd or even year
 - First Tuesday after the first Monday in November
- Charter may not be amended more often than every 2 years - *Ref. COR Charter, Sec. 22.03 and Tex. Cons. Art XI, Sec. 5 (b)*
- Interpreted as 2 calendar years; a calendar year defined as 365 days (or 366 days in a leap year) - *Ref. Tex. AG Opinion No. JM-466*
- The City's last Charter election was November 6, 2012
- Based on the legal references, the calculation to determine the two year requirement is $11/6/2012 + (365 \times 2 = 730 \text{ days}) = 11/6/2014$

Eligible Election Dates

- The two year requirement will be met on 11/6/2014
- However, the November 2014 uniform election date is 11/4/2014 (the 728th day); two days before the two year requirement is met (730 days)
- Based on these legal requirements, the first eligible uniform election date to hold a Charter Amendment Election would be **May 9, 2015**
- The first eligible uniform election date for November would be **November 3, 2015.**

| Uniform Election Dates | |
|------------------------|--|
| 11/06/2012 | Last Charter Election |
| 11/05/2013 | 364 Days |
| 5/10/2014 | 550 Days |
| 11/04/2014 | 728 Days |
| 5/09/2015 | First Eligible May Election Date Mayor/Council Election |
| 11/03/2015 | First Eligible November Election Date |

Charter Amendments

- Charter Sec. 22.03 allows Charter Amendments to be proposed to the voters by:
 - By Voter Petition consistent with State Law
 - By Action of the City Council
 - By Report of a Charter Commission created by Ordinance
- Charter Amendments must be done by Special Election:
 - In accordance with the Election Law
 - Specific Notice Requirements
 - Specific Ballot Format for Propositions (1 subject/1 question; “Yes or “No”)

Charter Review Recommendations

- **Appoint a Charter Review Commission**
 - **Composition**
 - Recommendation – 9 members including a Chair and Vice Chair
 - **Selection Process**
 - Selected by City Council Collaboratively
 - **Duration**
 - October – May
- **Conduct a Charter Amendment Election in November 2015 as directed by City Council**

Proposed Timeline for Nov 3, 2015

| Timeframe | Action |
|------------------|---|
| June 2014 | City Council Work Session - Initial Briefing Charter Review Process |
| Aug - Sept | Appointment Considerations – Charter Review Commission (CRC) |
| Aug - Sept | Appoint CRC/Determine Commission Charge |
| Oct - May | CRC Meetings |
| May 2015 | CRC Submits Final Report to City Council |
| May - July | Council Review/Public Hearings |
| July | Council Final Recommendation |
| Jul - Aug | City Atty –Final Review and Draft Ballot Language |
| Aug | City Council Work Session – Final Review |
| Aug 24, 2015 | Deadline to Call Election |
| Nov 3, 2015 | Special Election for Charter Amendment |

Proposed Review Process by CRC

By Categorical Order

1. Orientation/Attorney Review
2. Art. 1-2, 20-21 - Incorporation & Territory, Powers of the City, Prohibitions, General Provisions
3. Art. 3-4 - City Council, Nomination & Election of City Council
4. Art. 5 and 14 - Recall, Initiative and Referendum
5. Art. 6-8 - City Manager, City Atty/Court, Administrative Department
6. Art. 9-10 - Boards & Commissions, Civil Service
7. Art. 11, 16, 19 - Budget, Taxes, Bonds
8. Art. 12,13,15 - Franchises, Ordinances, Publications
9. Art. 17, 18, 22 - Street Improvements, Condemnation, Effective Dates/Adoption
10. Final Recommendation

Conclusion

- **Questions?**
- **Receive Council Feedback**