

CITY COUNCIL MEMBERS

Vanessa Fleisch, Mayor
Kim Learnard – Mayor Pro-tem
Phil Prebor – Post 1
Mike King, Post 2
Terry Ernst – Post 4

**City Council of Peachtree City
Agenda
March 16, 2017
7:00 p.m.**

- I. Call to Order**
- II. Pledge of Allegiance**
- III. Announcements, Awards, Special Recognition**
- IV. Public Comment**
- V. Agenda Changes**
- VI. Minutes**
 - February 27, 2017, Joint Meeting Minutes
 - March 2, 2017, Regular Meeting Minutes
 - March 4, 2017, Workshop – SPLOST Information
- VII. Consent Agenda**
 - 1. Consider Amendments to City Budgetary Policies
- VIII. Old Agenda Items**
- IX. New Agenda Items**
 - 03-17-03 Public Hearing – Consider Variance Request, 102 Brooksong Way (Mike Warrix)
- X. Council/Staff Topics**
 - Preview – Records Management Ordinance/Policy
- XI. Executive Session**
- XII. Adjourn**

This agenda is subject to change at any time up to 24-hours prior to the scheduled meeting

Peachtree City Planning Commission, City Council, and Multiple Boards
Joint Workshop Minutes
February 27, 2017
7:00 p.m.

The Peachtree City Planning Commission, City Council, and multiple boards met on Monday, February 27, 2017, at City Hall. Planning Commission Vice Chairman Aaron Daily welcomed everyone and called the meeting to order at 7:00 p.m. With no Planning Commission items on the agenda, the assembly entered into workshop session at 7:02 p.m.

Others attending: Mayor Vanessa Fleisch, Council Members Terry Ernst, Mike King, Kim Learnard, and Phil Prebor; Planning Commissioners Jack Bernard, Lisa Ann Curtis, and J.T. Rabun; Comprehensive Plan Advisory Board Members Sean McMillan, Nathan Walker, and Kim Westwood; Airport Authority (PCAA) Chairman Bryan LeBrecque and Airport Manager Hope Macaluso; and Water & Sewerage Authority (WASA) Vice Chairman Phil Mahler; Fayette County Development Authority (FCDA) President/CEO Joan Young and Vice President of Economic Development Emily Poole; City Manager Jon Rorie and City Planning and Development Director Mike Warrix.

Rorie kicked off the workshop noting that Peachtree City was approaching 60 years of age and was at a crossroads. A great deal of planning had gone into the community so far, but it was time to look at what the City would be moving forward. He noted that every group represented at the workshop had both common and competing interests, and therefore had different world views. Every decision and every trade-off had consequences.

Rorie continued that Peachtree City's Comprehensive Plan was currently being updated, which was a process that should cover land use for the next 20 years. Community facilities, transportation, and economic development were also components, and each of these touched every group represented.

Rorie said the City could approach the Comprehensive Plan in two ways – as a required exercise that had to be completed; or as an exercise to develop an action plan. No decision would be made that evening, but he was hoping to have attendees look at those four topics from a macro level and establish a forum for addressing them moving forward. Rorie said people in attendance, including the citizens, could work together, and how all those issues worked together comprised Peachtree City's destiny. He encouraged everyone to express their thoughts, and the discussion progressed.

Warrix then covered some of the components for the Comprehensive Plan Update, which occurred every five years and was again due in June 2017. Warrix said the Atlanta Regional Commission was assisting in facilitating Peachtree City's update, and there had been two public meetings on the update so far.

Currently, Peachtree City was developed under the "Village Concept." Some of the questions moving forward were: What is a village in 2017? Should we redevelop some places? Annexation policy – What's in it for me?

Rorie asked those attending what "village" meant to them. Bernard said, ideally, the villages were places to live, work, and play, with homes, recreation, and some part of the population able to work there. Rorie asked what villages currently had all those components. Prebor said his village did not offer that – Braelinn did not have a lot of professional office space like some of the other villages.

Fleisch continued that, years ago, the villages had been explained to new and prospective residents as having a fire station, elementary school, and recreation areas. That was no longer true of all the villages.

Rorie asked for participants to also include what areas the City might redevelop. Learnard said redevelopment was going to happen in Aberdeen due to the older homes. Rorie asked what other components would impact that process, and Rabun noted that sewer service would play a role. Rorie said the next question related to redevelopment would be, what type of investment would the community be willing to make. McMillan said that the City should be looking at the highest and best uses of properties, and analyzing parcels that were not returning enough.

Rorie then switched to the impact of annexation on older neighborhoods. He continued that the City required a balance in the tax base, noting that commercial property brought in more than residential property, but also impacted quality of life nearby. For residential property, the "break even" point in tax revenue generated versus services consumed was about \$325,000 in property value.

Curtis returned to the question about villages, which were less important now than issues like the outdated R-1 zoning category. She said people moved here for the Peachtree City environment, not a particular village. Prebor added that, to him, the village was really the local shopping center, and he moved to Peachtree City to retire because of the paths and overall community. Westwood asked if the elephant in the room was that the village concept was no longer viable, noting that successful communities at this time had downtown districts.

King said he lived in Glenloch Village, but primarily identified with his neighborhood, McIntosh Corner. He continued that residents could go anywhere in the City on the paths. The village was more commercial and residents identified with the City as a whole and their individual neighborhoods.

Bob Grove (WASA alternate in the audience) said we were not Peachtree Village but Peachtree City. Another member of the audience said he never remembered the "live, work, and play" concept applying to an individual village but to the entire City. The villages had been marked off by the developer. Ernst said that, in the 1970s, the village concept was a neat idea, with much smaller shopping areas serving as the center point. However, Peachtree City had somewhat outgrown that concept in the intervening years.

Warrix then moved to the Comprehensive Plan goal of preserving the natural environment, noting that Peachtree City had 3,766 acres (26% of the land) as nature area or greenspace. The greenspace protected water quality and maintained the City's landscape and buffer requirements.

Prebor noted that Peachtree City was not an urban area and should maintain some of the natural look. Curtis felt there was room for some improvement – the original paths probably killed hundreds of trees after construction, but there was surely a way to build paths now that would protect trees. She said she would also like to see an emphasis on water quality. She said the City should certainly keep the natural areas, but look for ways to improve upon them.

Rorie then turned to the community facilities portion of the Comprehensive Plan, noting they helped to maintain a high quality of life. He noted that everyone had a slightly different definition for "Quality of Life," and that during the ONE PTC Comprehensive Plan Update five years earlier, one of the biggest requests was for more community events – not runs, but major community

gatherings like Shakerag Arts & Crafts Festival, Hometown Holiday, 4th of July, etc. Paths, parks, schools, events, and infrastructure (sewer, water, cell coverage, microcells, fiber internet) all had a huge connection to the definitions of quality of life.

Poole said that many of the events and amenities that abounded in Peachtree City were not as attractive to the younger workforce. Learnard noted that West Georgia Technical College was working with seven counties, four of which had College and Career Academies. Coweta County had even gone so far as to adopt a German model apprenticeship program that provided students with an associate degree in a technical field with a job waiting for them upon completion.

Poole said that several Peachtree City companies had asked to partner with the Coweta program since Fayette County was not currently focusing on high tech jobs. The companies were challenged when trying to attract and retain the next generation of employees. Poole continued that, if Peachtree City wanted those types of businesses, it either needed to develop the amenities to attract those types of employees or to develop a means to grow the employees locally.

Rorie then asked if Poole's observations meant Peachtree City should change everything. He continued that he did not feel that was necessary, and the group would come back to that concept later. In general, as the workforce grew slightly older and had children, they began looking for good schools and many of the amenities already in Peachtree City.

Fleisch noted that, currently, one third of Peachtree City's residents were over 60 years of age, and that at age 65, residents could cut their school taxes by 50% or more. However, property values were directly tied to the quality of the school system. Poole said that many companies looking at Peachtree City were initially attracted by the quality schools.

Young then noted that communities had to continue to evolve, and Peachtree City might need to make some changes in some areas. As an example, she said that closer housing and bars could be put in one area without converting the entire city. The question became how to continue the evolution of the Peachtree City lifestyle for future generations. What would it look like, Young asked.

Prebor noted a recent uptick in family-oriented relocations, saying people liked living in Midtown (Atlanta) until their car was broken into or they could not walk their dogs, then they began looking for other locations with different amenities. He also noted that Oak Grove and Huddleston Elementary Schools were currently full, and that Booth Middle School and McIntosh High School were close. Fleisch noted they might not have good population trends until the 2020 census. Prebor felt the free market should decide on some of the development questions.

Bernard felt the age issue was more complicated than it appeared on the surface because older residents did not use some services (schools, police, court) as much as younger residents. He also said that taxes were lower in Peachtree City than in the county where he formerly lived, but that was not his reason for moving here. He said he did not think millennials would move to Peachtree City unless they had children, and that Peachtree City would not be able to create the atmosphere that would attract millennials with no children. Rorie agreed, saying Peachtree City could not spend enough to attract 20 – 30 year-olds who did not have children. However, the amenities that were already here could be enhanced.

Rorie continued that enhancing infrastructure was important. Peachtree City had historically had major battles over the location of cell phone towers, but cell service was vital. Microcells were a

developing alternative. The number one requested site for new towers by providers was the Braelinn Recreation Area. No one wanted towers, but everyone wanted coverage. Sewer service was also important to redevelopment and economic development, and Peachtree City's sewer system had been constructed at a developer's grade. WASA continued to maintain and upgrade the system.

Fleisch noted that sewer service increased property values, noting that in 2011, the Ankle and Foot Center had a fair market value of \$2.3 million, providing \$5,300 in property taxes to Fayette County and \$23,000 to the school system. In 2016, after annexation and connection to sewer, the property had a fair market value of \$6.9 million and provided \$13,000 to Fayette County, \$55,000 to the schools, and \$18,000 to Peachtree City.

There was some discussion about whether the Peachtree East shopping center was served by sewer [it is], and King noted there were several areas that might benefit from annexation and sewer service, but with hook-up fees at \$25,000+, it was cost-prohibitive.

Warrix noted that these types of questions showed how important comprehensive planning was, and noted they would love to have information on WASA about any planned expansions and their Capital Improvements Projects list for the coming years.

Rorie then transitioned the discussion to transportation, noting they were not there that evening to discuss the SR 54/74 intersection. He said the goals of the Comprehensive Plan included managing congestion and multi-use trail connectivity and bicycle routes. The first item, managing congestion, was an example of competing goals and uses.

Rorie explained that, in 2014, the City Council had authorized the Highway 54 W Corridor Study, which produced several recommendations. There had been a lot in the local news recently about the Highway 74 Gateway Coalition, which included Peachtree City, Tyrone, Fayette County, Fulton County, and Fairburn, and was looking at limiting curb cuts along SR 74. State Route 54 was also important, especially when looking at the areas around Peachtree City. The SR 54 W corridor traffic impacted Peachtree City, but was a regional problem. Sewer service to Senoia could increase development on the western border, which could impact SR 74 traffic, making that a regional problem as well.

The Comprehensive Plan mentioned alternate east-west routes to help with the impact of neighboring communities. Bernard said that transportation was a multi-faceted issue that required both a technical approach and a political approach. The technical approach was regional in nature, and he noted that Georgia had the lowest per capita funding for roads of any state. The political track required multiple governments working toward the same end, noting that political pressure worked on the Georgia Department of Transportation (GDOT) if enough entities were involved.

Shayne Robinson (Fayette County Transportation Committee, from the audience) noted that they allowed the municipalities and the County to approach the state together as a group. The committee was also looking at the borders shared with Coweta and Fulton Counties and was working with the Georgia Regional Transportation Authority. Poole added that a County of 150,000 asking for help had more impact than a city of 36,000.

Rorie noted that Peachtree City also shared a border with another County (Coweta) that was in a different Regional Commission [Three Rivers versus the Atlanta Regional Commission (ARC) that Peachtree City was in]. Allison Duncan (ARC and assistant to staff in facilitating the

Comprehensive Plan Update) noted that the regional commissions did meet periodically to discuss projects that crossed their respective borders.

Mahler asked if Atlanta was still considered a non-attainment area (relating to air quality). Duncan said Atlanta continued to make improvements based on the old standards, but the standards also kept changing. Mahler said the non-attainment status impacted the speed of traffic improvements being made in Metro Atlanta, and that improvements could not be constructed if air quality would suffer. He also noted that House Bill 170 from 2015 increased the transportation budget. He said Peachtree City needed to go to GDOT, but needed the Comprehensive Plan finalized. It would be a minimum of six to eight years from concept to construction for any major transportation projects. Rorie echoed that this was a big issue facing the community.

Fleisch said that, at some point, the SR 54/74 intersection would look completely different than it currently did. She asked if the City needed to enact an overlay district or architectural guidelines for the area since there were a lot of older buildings. She asked what the City needed in the form of ordinances to support the redevelopment that was already starting.

McMillan asked if a Community Improvement District (CID) would be beneficial. Fleisch said it could be a good thing. She also felt that the SR 57/74 intersection and the SR 54/Peachtree Parkway intersection were the closest thing Peachtree City currently had to a downtown. She asked about a Livable Centers Initiative (LCI) grant. Duncan said that was a possibility and also mentioned the Community Choices program. City Planner Robin Cailloux noted that the LCI program had grown considerably since its inception years earlier.

At that point, the discussion transitioned from the Comprehensive Plan to economic development. Poole noted that economic development touched all the areas discussed and was an important component to maintaining quality of life by creating jobs, adding capital investment, and improving the tax digest. She continued that Peachtree City had a unique set of amenities, and they wanted to attract businesses that would allow people to live, work, and play in the city while enhancing the amenities.

She continued that the average community in Georgia was 51% residential compared to commercial/industrial. In Peachtree City, residential land was 66% of the community, which could become a big burden on residents in the future. Through economic development, they were trying to increase the industrial footprint in Peachtree City so citizens were not shouldering so much of the tax burden.

Rorie asked attendees to consider whether 66% residential was actually a bad thing. Prebor suggested that, if homes were at or above the break-even point (\$335,000 in value), it might not be bad.

Fleisch noted that the average age of a home in Peachtree City was 20 years, and said if the City did not maintain the infrastructure, home values (which made up 66% of the tax digest) would drop. Council and staff had positioned Peachtree City to come out of the recent recession in a financially strong position, but they were still playing catchup on the maintenance. Realtor.com currently listed Peachtree City as one of their "most searched" zip codes, but that could change if problems were ignored.

Poole then noted that a data center type of business could bring in positions that paid \$80,000 to \$100,000 per year, plus millions in equipment and their building. Rorie noted tax abatement strategies were a common trade-off to attract these types of businesses. Poole said tax

abatements bonds would cover a specified number of years during which the industry was only liable for a portion of the taxes each year to offset their capital investment. Most locations offered incentives. Having incentives did not guarantee getting the business, but not having them guaranteed losing that business to another location. Poole noted that the community still got a portion of the taxes, as well as the facility and jobs, during the limited abatement period.

Rorie said everything came with a trade-off, noting that offering an abatement to the type of business described by Poole might be a good investment, but bringing in a warehouse that paid \$35,000 to employees would not. It was actually cheaper to keep existing businesses in Peachtree City than to recruit new businesses. He said the reason traffic backed up on SR 54 eastbound from Coweta County in the mornings was that people were commuting to work centers. Peachtree City had 12,000 jobs that people were coming to. By the same token, 12,000 left Peachtree City every day to go to jobs elsewhere.

Rorie then asked what role Atlanta Regional Airport – Falcon Field played. LeBrecque said the airport had about 80 acres of developable land, but they were limited by FAA requirements that the land only be used for aviation-related business. Access and infrastructure were also an issue because Dividend Drive was the only way to reach the facility and it was not particularly easy to access. PCAA's mission included developing that 80 acres, and they would work hand in hand with the FCDA to accomplish that. LeBrecque also noted that the facility also provided a great community gathering location due to the number of airline related families in Peachtree City.

Poole echoed that the airport was a phenomenal partner, and aerospace and aviation were one of the six targeted industries the FCDA recruited and incentivized.

Macaluso noted the reason for the airport's existence was to support the businesses in the City. People flew into the facility because it was located in or closest to the community or place they wanted to be. LeBrecque noted that the current runway was currently just short of the ultimate goal, with the next expansion planned in approximately two years after the approaches were addressed.

Rorie wrapped up the discussion by reviewing the next steps, which included the Comprehensive Plan meetings in March and April, and the City Council Retreat sessions that were currently being scheduled. He encouraged everyone to attend and participate.

In closing, Rorie asked if anyone had any final thoughts.

McMillan said that, during the discussion, he felt that a balanced approach was vital. Peachtree City could continue to be relevant, a place they were proud to call home, but had to continue to push forward and improve. Also, they had to make sure they remained relevant to working age people (which was not a particular generation and extended from age 18 to age 65).

LeBrecque said that traffic was probably the greatest barrier to looking forward – they continuously were looking at options or opportunities through the lens of, "if we do this, it will add traffic." If traffic was not addressed, it would drive every other consideration moving forward.

Prebor said his family found Peachtree City through Delta, and noted that Delta hired about 1,000 pilots a year.

King said everyone had moved here for the quality of life, and Peachtree City was still a premier place to raise children in South Metro Atlanta. There were not many homes in Peachtree City for

sale, which spoke highly of the community. Their job was to keep doing what had worked, clean up what had not, and then maintain it.

Curtis said that, nearly 50 years before, someone came up with the crazy concept of Peachtree City's paths. She said that type of forward thinking needed to be kept up. Communities all over the country were doing cutting edge things, and Peachtree City could choose which great ideas would work here.

Rorie said his goal in the workshop had been to address a possible disconnect among the various boards, noting that WASA usually did not hear Council deliberate, Council did not always hear Planning Commission deliberate, etc. The disconnect impacted how every board operated, and he felt more interaction and forums like this one helped to overcome that disconnection.

Curtis gave one final thought, noting that the destiny of Peachtree City rested largely on the people in the room, not working alone, but together to determine where the community was going, how to enhance and improve amenities, maintain property values, and attract workers.

The workshop adjourned at 9:08 p.m.

Betsy Tyler, City Clerk

Vanessa Fleisch, Mayor

City Council of Peachtree City
Meeting Minutes
March 2, 2017
7:00 p.m.

The Mayor and Council of Peachtree City met in regular session on Thursday, March 2, 2017. Mayor Vanessa Fleisch called the meeting to order at 7:00 p.m. Others attending: Terry Ernst, Mike King, Kim Learnard, and Phil Prebor.

Announcements, Awards, Special Recognition

Mayor Fleisch recognized Chad Matheny and Andy Lee of the Fire Department for 20 years of service. American Legion Post 50 Commander Jose Cuevos and Past Commander Wayne Fowler recognized Police Officer Adam Pendleton as Post 50's Law Enforcement Officer of the Year and Fire Lt. Will Harbin as Firefighter of the Year. Cuevos and Fowler announced that Pendleton had placed second in the District (state) Law Enforcement of the Year and Harbin earned honors as the state's Firefighter of Year.

Public Comment

Evan Martin, Christy Daniels, and Juanita Herrera addressed Council regarding a spot redistricting planned by the Board of Education. Approximately 32 students from Sawmill Trace and Sandown Creek subdivisions who presently attended Huddleston Elementary School would be moved to Oak Grove Elementary School in an effort to relieve overcrowding at Huddleston, as well as Booth Middle School and McIntosh High School. Those students would later attend Rising Starr Middle School and Starr's Mill High School. The speakers said they purchased their homes because of the school attendance area, noting that Oak Grove and the Starr's Mill complex were located further away, which would prohibit walking or riding bicycles to school. The speakers noted they lived in established neighborhoods, asking why long-time residents were being pushed aside to make way for new development on the City's west side, pointing out the homes had not yet been built.

Agenda Changes

Ernst noted that the address in New Agenda item 13-17-01 Consider Emergency Stormwater Pipe Rehabilitation, 201 Journeys End – Utility Asset Management, Inc. was incorrect. He asked that the agenda item be changed from 201 Journey's End to 410 Journey's End.

Minutes

February 16, 2017, Regular Meeting Minutes

King moved to approve the February 16, 2017, regular meeting minutes. Ernst seconded. Motion carried unanimously.

Consent Agenda

- 1. Consider Proposed Amendments to Soil Erosion & Sedimentation Control Ordinance**
- 2. Consider Surplus of Vehicles & Lease of Vehicles to Keep Peachtree City Beautiful**
- 3. Consider Appointments to Convention & Visitors Bureau – James Hooper, Patti Kadkhodaian**
- 4. Consider Approval of Underground Utility Easement for TowerCom on Peachtree Parkway**

Learnard moved to approve Consent Agenda items 1, 2, 3, and 4. Prebor seconded. Motion carried unanimously.

New Agenda Items

- 03-17-01 Consider Emergency Stormwater Pipe Rehabilitation, 201 410 Journeys End – Utility Asset Management, Inc.**

Stormwater Manager Mike Madison asked Council to approve the low bid of \$54,204 from Utility Asset Management, Inc. Madison noted funds were budgeted in the Stormwater Utility's Contractual Services Account.

The emergency repair was necessary due to a large sinkhole in the front yard of the property that was located 10 – 12 feet from the house's foundation. The sinkhole was due to a structurally degraded 36-inch storm drainage pipe that ran through the front and side yard of the property.

Learnard moved to approve the bid for the emergency stormwater pipe rehabilitation from Utility Asset Management, Inc., in the amount of \$54,204 as presented. Ernst seconded. Motion carried unanimously.

03-17-02 Consider Resolution of Opposition to SB 116 Prohibiting County/Municipal Assessment of Stormwater Utility Fees on Water-Neutral Properties

City Attorney Ted Meeker said there were currently two stormwater bills pending in the General Assembly, and one did not apply to the City's stormwater utility (requirement that the fees not be reflected in tax bills). Meeker noted the City had always billed separately.

The second bill [Senate Bill (SB) 116] would allow developments built in accordance with state standards to be exempted from stormwater fees going forward. Meeker said it was important for the City to let the General Assembly know their opposition to this bill. The main reason was the continued maintenance and repair costs for the development's system would be ongoing. The fees collected by the facility were not used just for repairs on-site. The fees were also used to maintain the overall stormwater collection system in the City.

Learnard asked who sponsored the bill. Madison said the bill was written by Senators Ginn, Williams, Shaffer, Jeffords, and others.

Fleisch said she understood the bill had died. City Manager Jon Rorie said staff had not been able to confirm that, and he urged Council to move forward with the resolution.

Meeker said the Georgia Municipal Association (GMA) had alerted its members approximately one and one-half weeks prior to the meeting, and the resolution was prepared for this agenda.

Prebor asked the motivation for the bill and how the municipalities represented by the bill's authors dealt with stormwater. Meeker said he did not know. The bill would seem to benefit certain new developments at the expense of the older developments.

Ernst asked whether new developments currently under construction in the City would be affected if the legislation passed. Meeker said it would affect any development that came after the bill was passed. King asked if other cities were voicing the same objection. Rorie said GMA had come out against the legislation.

King moved to approve New Agenda item 03-17-02, the Resolution of Opposition to SB 116 Prohibiting County/Municipal Assessment of Stormwater Utility Fees on Water-Neutral Properties. Prebor seconded. Motion carried unanimously.

Council/Staff Topics

Rorie reminded Council that an information session would be held on Saturday, March 4, 10:00 a.m., in Council Chambers on the City's project list for Special Purpose Local Option Sales Tax (SPLOST) referendum scheduled March 21. He hoped there would be a large turnout.

Executive Session

Meeker said there were no items for executive session.

There being no further business, Learnard moved to adjourn. King seconded. Motion carried unanimously. The meeting adjourned at 7:32 p.m.

Pamela Dufresne, Deputy City Clerk

Vanessa Fleisch, Mayor

City Council of Peachtree City
Workshop Minutes
March 4, 2017
10:00 a.m.

The Peachtree City Mayor and Council held a workshop meeting on Saturday, March 4, 2017, in Council Chambers. Mayor Vanessa Fleisch opened the workshop at 10:00 a.m. Others present: Mike King, Kim Learnard, and Phil Prebor. Terry Ernst was unable to attend.

The purpose of the workshop was to provide information to the public on the Peachtree City projects included in the 2017 SPLOST Referendum that would be held on March 21, 2017.

Staff reviewed the Peachtree City projects in the project manual. Attendees were able to ask questions during and after the presentation.

The workshop ended at approximately 11:30 a.m.

Betsy Tyler, City Clerk

Vanessa Fleisch, Mayor

CITY OF PEACHTREE CITY
INTEROFFICE MEMORANDUM

TO: Mayor and City Council

VIA: Jonathan Rorie, City Manager 

FROM: Paul J. Salvatore, Financial Services Director *PJS.*

DATE: March 9, 2017

SUBJECT: Consider approval of updated Budgetary Policies
March 16, 2017 City Council Meeting

Recommendation

Approve the revised Budgetary Policies as presented at the February 16, 2017 City Council Meeting (attached).

Discussion:

Staff reviewed all the proposed edits to the city's Budgetary Policies with Council at the February 16 City Council Meeting. Questions that were raised by Council since that meeting have now been addressed, so we are now asking Council to consider approval of the revised policy. The policy is attached in our new COPP's format.

Budget Impact

N/A



CITY OPERATING POLICIES AND PROCEDURES

Policy/Procedure 9-05: Budget Policies

OPR: Finance

06/21/01 (Revised 3/16/17)

I. Purpose

The City of Peachtree City has enacted the following policies as a basis for the City's routine financial practices associated with preparation, adoption, and execution of the City's operating and capital budgets. Their primary objective is to provide a standard of budgetary performance that both staff and Council have endorsed and to provide budgetary decision-making with greater continuity, reinforcing the City's core financial values and preserving them for successive staff and Council.

Regular, updated budget policies can be an important tool to ensure that City resources are used to meet its commitments, to provide needed services to the citizens of Peachtree City, and to maintain sound financial management practices. These policies are therefore guidelines for general use and allow for exceptions in extraordinary conditions.

These policies have been approved by the City Manager and Financial Services Division and have been adopted by the City Council. The Budget Policies of the City will be reviewed annually and can be adjusted at any time by action of the City Council.

II. Operating & Capital Budget Policies

Budget Scope:

Policy 1. Funds included in the operating budget. The operating budget shall include the following funds:

- Governmental Type Funds
 - General Fund
 - Special Revenue Funds
 - Capital Projects Funds
 - Debt Service Funds

- Proprietary Type Funds
 - Stormwater Utility Fund (including stormwater capital projects)
 - Amphitheater Fund

Policy 2. Integration with capital budget. All capital project budgets will be prepared concurrently with the annual operating budgets for each fund and are to be an integral part of the operating budget.

Policy 3. Baseline and service level funding. In the absence of a fiscal crisis, the City's top program priority is the maintenance of existing service levels in all divisions and departments. To reflect this, the budget process should include the calculation of baseline funding levels for all departments, reflecting current staffing, and inflationary increases in supplies and service budgets. This baseline should serve as an agreed-upon point of departure for subsequent budget discussions, such as the impact of adding additional personnel or a new facility or service. Any additional services above the baseline level shall be fully funded at the time of the adoption of the annual budget, and the ongoing funding source(s) for these additional services, for the current and all subsequent years, shall be clearly identified. Such ongoing funding sources must be in the form of either new or increased revenues, or clearly identified expense reductions.

Budgetary Balance:

Policy 4. Adoption. The City shall adopt and operate under an annual balanced budget for the General Fund, the Capital Projects Funds, each Special Revenue Fund, and each Debt Service Fund in use by the City. The annual balanced budget shall be adopted by resolution of the City Council prior to the start of each fiscal year.

Policy 5. Balance defined. The budget resolution is balanced when the sum of the estimated revenues and appropriated fund balances is equal to appropriations. Appropriations of fund balances shall only be made in compliance with the "Reserves" section of this policy. There are additional requirements for budgetary balance that apply to the Stormwater Utility Fund. Per requirements set forth in the original Stormwater Bond covenants, the utility must also maintain a bond debt service coverage ratio of at least 1.15, on an annual basis. This means that the annual revenue available for debt service, after payment of all other annual operating expenses, must exceed the amount of the annual debt service by at least fifteen percent (15%). This standard shall remain in place as a management policy, regardless of the original bond covenant requirements, unless future bond covenants require a more restrictive coverage ratio.

Policy 6. Capital projects. The City shall adopt and operate under a project-length balanced budget for each capital projects fund in use by the City. The project-length balanced budget shall be adopted by resolution in the year that the project initially begins and shall appropriate total expenditures for the duration of the capital project. Following are the guidelines to be used for ranking capital projects for inclusion in the City's capital budget:

Capital Project Ranking Criteria:

Core Projects

Projects that must be funded and meet one of the following criteria:

- Critical to remedying or preventing a major health/safety hazard (e.g. sewer line problem, sink-hole in roadway, or other failing infrastructure)
- Legally mandated (e.g. DOT and EPA standards – especially if fines for non-compliance)
- Essential to completing a project phase (e.g. complete construction of a building partially funded in a prior period)

Essential Projects

Projects that are essential in order for the City to provide services (ranked in order of importance):

- **Positive Fiscal Impact** – the project creates revenues or identifies savings in excess of the project cost and is justified by a cost-benefit analysis
- **Outside Agency Grants** - Projects recommended by the state and/or county development authorities that are expected to provide economic benefit to the community (job creation, tax revenue, etc.)
- **Facilities/Equipment Maintenance or Replacement** – a maintenance or replacement program essential to avoid a predicted failure in the near future
- **Conformance with Plans/Policies** – the project implements a specific policy/plan that has been adopted by the City Council
- **Project Interdependence** – the project interrelates with other projects or programs that are underway or completed (e.g. furniture & fixtures for new building, vehicles and equipment for new station, etc.)
- **Severity of Foregoing the Project** – service levels will be severely impacted as a result of not going forward with the project
- **Leverage (Optional Grants)** – city funds provide committed federal or state funds at a ratio of 1:3 or greater (e.g. 20% local share of GA DOT landscaping projects)

Discretionary Projects

If/when discretionary funds are available after meeting the aforementioned criteria, consideration will be given to projects such as the following:

- Optional Remodeling or Construction and Office Equipment/Furniture
- Optional purchase of land for additional green space and/or use in expanding recreation or other optional services

- Optional additional vehicles & equipment and/or upgrades from existing

Policy 7. Budgeting/accounting basis. The City will make all current expenditures with current revenues, avoiding procedures that balance current budgets by postponing needed expenditures, accruing future revenues, or rolling over short-term debt.

Budgetary Reserves:

Policy 8. Types and levels of reserves. The City, in conjunction with Governmental Standards Board Statement No. 54 (Fund Balance Reporting and Governmental Fund Type Definitions), shall maintain the following fund balances (reserves) in all governmental type funds that are established in Policy 1:

- Non-spendable – to establish balances that cannot be spent because they are in a non-spendable form (i.e. inventories, prepaid amounts, long-term loans and notes receivables, or property held for resale).
- Restricted – to establish balances constrained for a specific purpose through restrictions of external parties (i.e. creditors, grantors, contributors, or laws or regulations of other governments) or by constitutional provision or enabling legislation. These balances may include monies from loans, grants, and donors, particularly in those governmental fund types normally other than the City's General Fund.
- Committed – to establish balances constrained for specific purposes imposed by formal action (ordinance or resolution) of the City Council and shall include all funds not designated as non-spendable, restricted, assigned, or unassigned. These funds will be for the specific purpose of establishing a revenue stabilization fund to provide resources to cover anticipated and unanticipated revenue shortfalls in subsequent years. If available, committed reserves shall also be used to replenish the unassigned reserves to the minimum 25% level should they fall below that level.
- Assigned – to establish balances to be set aside by City management to fund a projected budgetary deficit in a subsequent year's budget as adopted by City Council.
- Unassigned – remaining amount that has not been classed as non-spendable, restricted, committed, or assigned that shall remain equal to or greater than twenty-five percent (25%) of the "Total Uses of Funds" amount appropriated in the General Fund budget. These unassigned funds are intended for the following purposes:
 - Cash Flow – to maintain sufficient cash on hand to satisfy cash flow needs of the City, especially between the start of the fiscal year and such time that property tax revenues are received.
 - Operating Contingencies – to provide resources to pay for expenses that were not originally appropriated in the annual operating budget.
 - Insurance – to provide funding for unanticipated costs associated with the repair and/or replacement of City property that is unexpectedly damaged or destroyed, and for other liabilities for claims against the City in excess of the amount recovered through claims filed against

individuals or with the City's insurance carriers, or other reimbursements such as State and/or Federal disaster assistance.

- Grants – to provide funding to cover costs associated with grant projects when funds must be expended prior to submitting for grant reimbursement (i.e. SAFER, CERT, COPS FAST, GA DOT, etc.)
- Loans – to provide funding to cover costs associated with purchases and construction of fixed assets that will be financed upon completion through a reimbursement resolution process.

Unassigned reserve fund balance shall be reviewed annually and any significant amounts over the 25% minimum shall be reclassified as committed, unless an alternate use is agreed upon by Council. Similarly, any available committed reserves shall be used to replenish the unassigned fund balance should it fall below the 25% minimum.

- **Capital Project (CIP) Contingency** – to provide funding for unanticipated costs associated with capital projects/equipment in the Capital Improvement Program, or for new projects/equipment that were not originally appropriated in the CIP budget. Subject to annual review, the City shall appropriate an amount per year, as deemed necessary in a CIP Contingency account to serve these purposes. Any excess project funds, including interest earnings of capital projects funds, shall also be transferred into this account upon completion of any project that completes under budget. The City Manager shall review the CIP Contingency Fund balances on a regular basis to determine if they will still be needed for projects. If not, they may be transferred back to the General Fund or be used for other lawful purposes.
- **Special Consideration** – at the will of Council, any of the committed, assigned, or unassigned funds balances (reserve amounts) described in this policy may be combined and used for any lawful purpose that Council sees fit, provided that a sound financial plan for replenishment of the reserve funds is established prior to any such disbursement. The use of any committed funds requires formal action through a Council resolution and must be enacted prior to the close of each fiscal year.
- **The City shall strive to meet the above reserve requirements, and staff and Council will review the requirements annually.**

Budget Responsibility:

Policy 9. Preparation and submittal. Per City Ordinance, the City Manager has the responsibility for the preparation and submittal of the City's annual budget. In this capacity, he shall have the authority to standardize budget documentation, to prepare the budget calendar, and to review departmental budget requests for accuracy and conformity to budget guidelines. He shall also review all revenue forecasts prepared during the budget process. The Financial Services Division shall assist the City Manager in fulfilling these responsibilities by preparing and submitting a draft budget to the City Manager.

Policy 10. Implementation. The Financial Services Director shall be responsible for overseeing budget implementation. Duties in this phase will include, but are not limited to, preparation and review of interim financial reports, monitoring revenues, reviewing

departmental expenditure requests for conformity with budget, reviewing supplementary appropriation requests, and recommending transfers across accounts or departments in conformity with the City's budget implementation policies.

BUDGET IMPLEMENTATION POLICIES

Budget Amendments and Reallocations:

Policy 11. Legal level of control. Means the lowest level of budgetary detail at which a local government's management or budget officer may not reassign resources without approval of the governing authority. Per Georgia State law, the City's legal level of control shall be, at a minimum, expenditures for each department for each fund for which a budget is required.

Policy 12. Budget amendments. Any increase in appropriation at the legal level of control whether accomplished through a change in anticipated revenues in any fund or through a transfer of appropriations among divisions, shall require the approval of the City Council. Such amendment shall be adopted by resolution.

Carryovers. Financial Services staff shall prepare an estimate for each project that staff intends to re-appropriate funds for at year-end. City staff shall be authorized to carry forward any available appropriations from previous years' approved budgets for any capital projects that are still active based upon *actual* available balances at fiscal year-end, although such amounts may differ from the estimates prepared during the budget process. Funds may also be carried forward for essential expenditures of the General Fund that, according to generally accepted accounting principles, have not been incurred by year-end. Such General Fund carryovers shall be included in a budget amendment for the subsequent fiscal year, which will be presented to Council for approval.

Policy 13. Reallocations. Transfers of appropriations within any fund below the City's legal level of control shall require only the approval of the Financial Services Director. Departmental requests for reallocations must be sent to the Financial Services Director by a Director or Chief or their designee. In general, funds may not be reallocated from the Personnel Services group of accounts since such allocations must be preserved in order to meet budgeted savings projected from position vacancies. Exceptions may be made under certain circumstances, such as a reallocation for using temporary contracted labor during the time period of a position vacancy.

Policy 14. Preventing overspending. The City Manager may impound budgetary authority for spending in situations when total revenues of a fund fail to keep pace with estimated revenues budgeted for that fund, or in other situations where the cost of any particular service or commodity is expected to be significantly less than the amount appropriated.

Policy 15. Reporting. The Finance Department shall be responsible for preparing monthly budget status reports that will be made available to the public. They are also responsible for preparing an annual financial report as of fiscal year-end.

REVENUE POLICIES

Policy 16. Review of fees and charges. Each department shall be responsible for conducting a survey of all fees and charges pertaining to their operations on a regular basis, but no less than every three years. Per city ordinance, all proposed fee changes must be approved by City Council before being implemented.

Policy 17. Use of one-time revenues. One-time revenues shall generally not be used for on-going operating expenses, such as additional personnel or new contracts for goods or services that will remain in effect after the one-time revenue source has been exhausted. Examples of allowable uses of one-time revenues are purchases of capital assets, start-up costs, early debt retirement, and deposit to the operating reserve fund. Use of one-time revenues for other purposes may be considered on a case-by-case basis.

Policy 18. Adjustment to millage rate. At the will of the Council, reductions in the Maintenance and Operation millage rate may be made in any budget year where Special Purpose Local Option Sales Tax (SPLOST) or other voted revenue sources will be available to provide funding for eligible projects of such funding sources covered by Maintenance and Operation ad valorem property taxes. Conversely, should a SPLOST or other revenue source cease to exist, Council should consider adjusting the millage rate accordingly to recover the lost revenue, unless another new or increased revenue source is available.

III. Approvals

City Council
City Manager
Financial Services Director

STAFF REPORT

CITY COUNCIL

TO: Mayor and City Council

VIA: Jonathan N. Rorie, City Manager

FROM: Michael Warrix, AICP
Planning and Development Director

DATE: March 9, 2017

SUBJECT: Public Hearing: Consider Variance Request, GR-3 Zoning Rear Setback Requirement, 102 Brooksong Way
March 16, 2017 City Council Meeting

Case Number:	PV17-0001
Request:	Variance from Section 1004.4(h), Zoning Ordinance
Required Rear Setback:	20 Feet
Requested Variance	6 Feet 3 Inches
Property Location:	102 Brooksong Way, Lot 2 Brookfield Phase I
Current Zoning:	GR-3, General Residential
Parcel Size:	0.13 Acre (5,700 Square Feet)
Property Owner:	Robert and Imelda Hills
Applicant:	Robert and Imelda Hills

Request

The Applicant is requesting relief in the form of a variance from the rear setback requirement [Section 1004.4(h) of the GR-3, General Residential zoning district. The GR zoning district requires a minimum rear building setback of 20 feet. The Applicant proposes to construct a 140 square foot (10' x 14') addition to the rear of the home that would encroach into the rear setback by approximately six (6) feet. The proposed addition would tie into the existing roof line. Siding would match the existing siding of the home. The existing home is in compliance with all applicable GR-3 setbacks.

As part of the application, the Applicant has included a site sketch showing the proposed improvement in relation to the rear property line, a letter of approval from the Brookfield Homeowner's Association, Inc., and related photographs.

Subject Property

The subject property is generally flat to gently sloping and rectangular in shape.

Variance Consideration

In accordance with Section 1202 of the Zoning Ordinance, variances shall only be granted upon showing that:

- (a) Relief, if granted, would be in harmony with, or could be made to be in harmony with, the general purpose and intent of the zoning ordinance; or

- (b) The application of the particular provision of the zoning ordinance to a particular piece of property, due to extraordinary and exceptional conditions pertaining to that property because of its size, shape, or topography, would create an unnecessary hardship for the owner while causing no detriment to the public.

Variance Criteria

Section 1207 of the Peachtree City Zoning Ordinance states:

In reviewing a request for a variance, the City Council shall not grant the request unless all of the following findings can be made:

- (a) There are special circumstances applicable to the property, including location, shape, size, surroundings, or topography so that the strict application of this ordinance denies the property of privileges enjoyed by other property in the vicinity and under identical zoning district classification;

Staff Comment: Other than the small size of the lot, no special circumstances are applicable to the property. Due to the lot size and configuration of the home, it would not be possible to construct the proposed addition without encroaching into the rear setback.

- (b) The strict or literal interpretation and application of this ordinance would result in practical difficulties or unnecessary hardships inconsistent with the general purpose and intent of the Zoning Ordinance, or would deprive the Applicant of privileges granted to others in similar circumstances;

Staff Comment: No evidence of practical difficulties or unnecessary hardship was presented as part of the application. A strict or literal application of the ordinance would, however, prevent the Applicant from improving the property as proposed.

- (c) There are exceptional or extraordinary circumstances or conditions applicable to the property involved or the intended development of the property which preclude the applicant from complying with this ordinance and that do not apply generally to other property in the same zoning district and which prevent the applicant from complying with existing regulations;

Staff Comment: Other than the small size of the lot, no exceptional or extraordinary circumstances exist on the property.

- (d) The granting of such variance will not constitute the granting of special privileges inconsistent with the limitations on other property in the same zoning district;

Staff Comment: No evidence was presented as part of the application that would show that granting of a variance in this case would not constitute a special privilege. The subject lot is one of the smaller lots within the Brookfield subdivision.

- (e) The granting of such variance will not be materially detrimental to the public health, safety, or general welfare nor injurious to property or improvements in the zone or neighborhood in which the property is located; and

Staff Comment: Granting of a variance in this case would not be detrimental to public health, safety, or general welfare. The Applicant has obtained the approval of the Brookfield HOA for the proposed improvement.

- (f) *The granting of such variance will not create inconsistencies with any objective of the Comprehensive Plan.*

Staff Comment: Granting of the variance would not create any significant inconsistencies with the Comprehensive Plan, which encourages the protection of the character of existing neighborhoods as well as the redevelopment and reinvestment within neighborhoods.

Recommendation

Should Council choose to approve the variance request, staff recommends the following conditions:

1. The variance shall be limited to an encroachment of no more than six (6) feet three (3) inches into the rear building setback as shown on the site plan submitted by the Applicant. There shall be no other encroachments permitted without first securing additional variances.
2. Following completion of construction and prior to issuance of the Certificate of Occupancy, the Applicant shall provide a Foundation Survey to the Building Official that identifies the location of new construction. The purpose of this survey is to ensure the new construction does not encroach any further into the rear setback than permitted by this variance.

ATTACHMENTS



Please use blue or black ink to fill out this form.

VARIANCE APPLICATION

153 Willowbend Rd, Peachtree City, GA 30269
P: 770-487-5731 F: 770-631-2552

WWW.PEACHTREE-CITY.ORG

Admin. Variance Fee: \$25.00

Variance Fee: \$250.00

Receipt # 00022254

Date Filed 2/1/17

Case # 2017-0001

Office Use Only

VARIANCE LOCATION	Street Address <u>102 Brooksong Way</u>	PROPERTY OWNER	Name <u>Robert & Imelda Hills</u>
	Zoning District: ☒ Residential ☐ Multi-Family ☐ Commercial/Industrial/Office		Phone <u>361 446 3385</u>
APPLICANT	Variance Type: ☐ Administrative ☐ Special Exception ☒ Variance (check one below)	PROPERTY INFO	Email <u>bobhills@icloud.com</u>
	Variance from which ordinance: ☐ Sign ☐ Fence ☐ Land Development ☐ Zoning		Subdivision: <u>Brookfield</u>
APPLICANT	Name <u>Robert & Imelda Hills</u>	SUPPORTING DOCUMENTS	Phase: <u>1</u> Lot # <u>2</u>
	Address <u>102 Brooksong Way</u>		Please submit the following evidentiary items in support of this application and the requested variances. (Please check off the items that are attached to this application)
APPLICANT	City, State, Zip <u>PEACHTREE CITY GA</u>	SUPPORTING DOCUMENTS	☒ Site plan (with property lines and proposed work)
	Phone # <u>361 446 3385</u>		☒ A detailed report justifying the requested variance
APPLICANT	Email <u>bobhills@icloud.com</u>	SUPPORTING DOCUMENTS	☒ Letters of support from adjacent property owners <u>HOA</u>
			☒ Digital Photographs \ Renderings (CD or Email)
APPLICANT		SUPPORTING DOCUMENTS	☐ Other Items Demonstrating Need (topo. Survey, etc) <u>N/A</u>

ADMINISTRATIVE VARIANCE	1.) Is a current survey included with the application? ☐ Yes ☐ No	Briefly describe why this variance is being requested: (A separate detailed report is still required to be attached to this application)
	2.) Does the application pertain to a zoning setback? ☐ Yes ☐ No	
ADMINISTRATIVE VARIANCE	3.) Is the violation an existing setback violation? ☐ Yes ☐ No	
	4.) How long has the violation existed? _____ Years	
ADMINISTRATIVE VARIANCE	5.) What is the required setback? _____ Feet	
	6.) How much of a variance is being requested? _____ Feet	
ADMINISTRATIVE VARIANCE	7.) Were you the owner of the property when the violation occurred? (If not, who was?) ☐ Yes ☐ No	

SPECIAL EXCEPTION	1.) Is a current survey included with the application? ☐ Yes ☐ No	Briefly describe why this variance is being requested: (A separate detailed report is still required to be attached to this application)
	2.) Has property been rezoned or deed restrictions? ☐ Yes ☐ No	
SPECIAL EXCEPTION	3.) Is the violation an existing setback violation? ☐ Yes ☐ No	
	4.) Application for a bldg setback, fence, or parking? (Circle One)	
SPECIAL EXCEPTION	5.) What is the required setback, height, or spaces? _____	
	6.) How much of a variance is being requested? _____	
SPECIAL EXCEPTION		

VARIANCE	Please review the ordinances and instructions on the back of this page.	Briefly describe why this variance is being requested: (A separate detailed report is still required to be attached to this application)
	1.) Is a current survey included with the application? ☒ Yes ☐ No	
VARIANCE	2.) How much of a variance is being requested? <u>6'3"</u> Feet	<u>EXPAND KITCHEN TO ALLOW DINING ROOM & PANTRY</u>
	3.) Were you the owner of the property when the violation occurred? (If not, who was?) ☐ Yes ☐ No	
VARIANCE		

I hereby certify that I am the owner of the property on which a variance is being requested and that all information provided as a part of this application is true and correct.

Signature of Owner/Agent: _____ Date 2/1/17

OFFICE ONLY

ADMINISTRATIVE VARIANCE	Signature: _____
Date of Acceptance: _____	Date of Hearing: _____
	☐ Approved ☐ Denied
	☐ Approved with Conditions
SPECIAL EXCEPTIONS & VARIANCE FROM ORDINANCES	This application, along with the required fee and all necessary supplemental documents, has been properly submitted and is hereby accepted for consideration by the City Council at a public hearing in the City Council Chambers at 7:00 PM on the date shown below:
Signature: _____	Date of Acceptance: <u>2/10/17</u> Date of Public Hearing: <u>3/6/17</u>

1/26/2007

Regarding 102 Brooksong Way, Brookfield Subdivision
Peachtree City, GA Setback Variance Petition

The owners Robert and Imelda Hills purchased this property in August 2016 after waiting several months for a listing in their price range and choice of living area. The house is a 1260 square foot, 3 bedroom 2 bath with 2 car Garage. The living room bedrooms and bath rooms are perfectly fine for the owners needs. The kitchen, dining area and laundry room are very small (116 sq ft) further complicated by the back door also in this area.

The owners wish to build a 10x14 ft addition to the kitchen,dining ,laundry area. This will provide adequate space for a dining table and china hutch. Moving the laundry into the new space will make room for a pantry and cupboard space. The back door problem will also be solved.

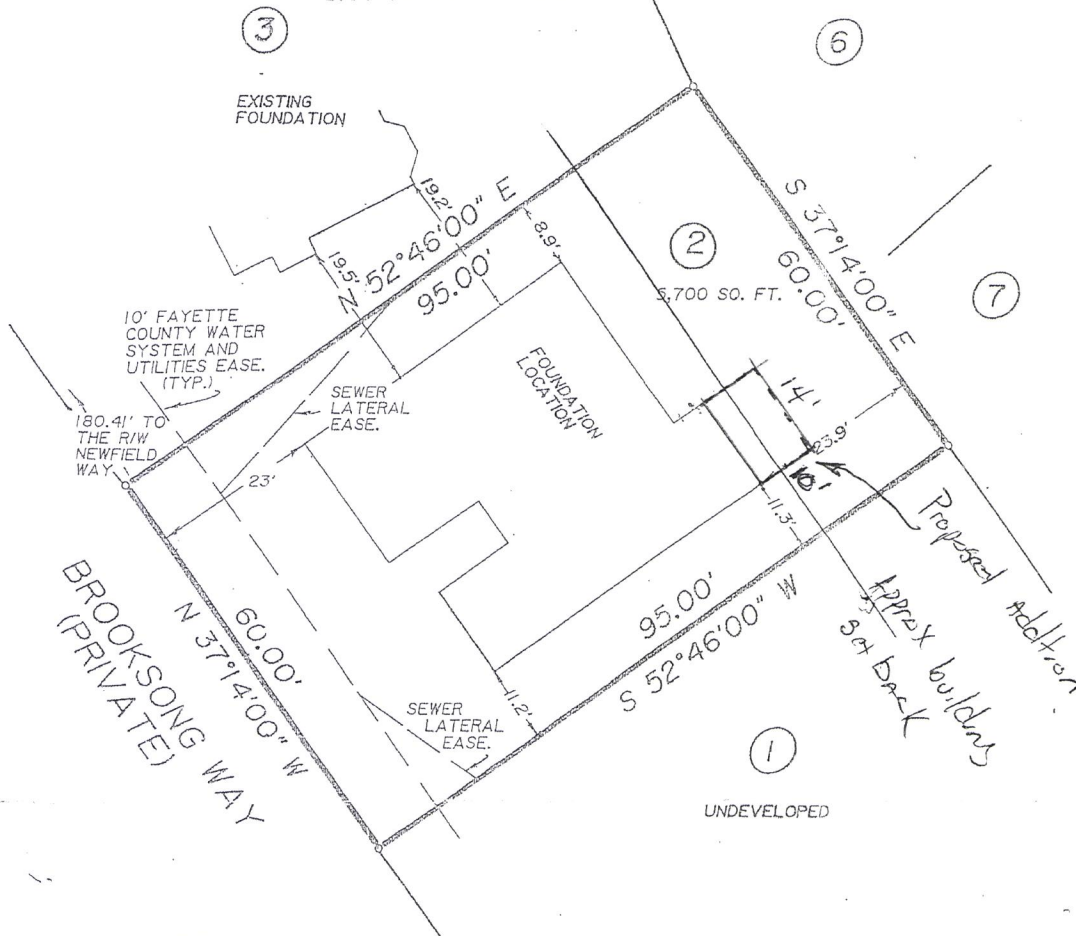
The owners petitioned, and were given approval by, The Brookfield Homeowners association,inc.to construct a 10x14 foot addition on the back of 102 Brooksong Way. The 10 feet by 14 feet addition will tie into the existing roof line and the siding is to match the existing siding. All other covenants continue to apply.

In order to continue with this project the owners are petitioning the City of Peachtree City for a 6 ft 3 inch

setback variance in order to comply with setback requirements.

Respectfully submitted: Robert and Imelda Hills

Plenty 10/24/95
 BUILDING OFFICIAL
 CITY OF PEACHTREE CITY



NOTE:
 FOUNDATION LOCATION
 BY THIS OFFICE ONLY.
 BOUNDARY DATA
 TAKEN FROM A PLAT
 OR DEED BY OTHERS.



In my opinion, this property does not
 lie within the 100 year flood plain
 according to the HUD Flood Plain
 Map No: 130078-0002C
 Dated: DEC. 1, 1977

SETBACKS:
 FRONT: 15' (Garage no closer than 20') or as shown.
 SIDE: 0 (10' min. between dwellings) (20' separation every 10 dwellings.)
 REAR: 20' (40' where adjoining residential).

PREPARED FOR:

HAYES - JOHNSON

SUBDIVISION: BROOKFIELD		P.B. 26, PG. 189
LOT: 2	LAND LOT: 40	DATE: 9-25-1995
BLOCK:	DISTRICT: 6th	REV: 10-19-95
SCALE: 1" = 20'	COUNTY: FAYETTE, GA.	JOB NO: 950984

jefferson
consultants

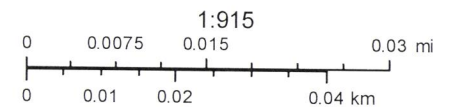
consulting engineers • surveyors • planners

P.O. BOX 2627 PEACHTREE CITY
 487-9805 GEORGIA 30269 487-9220

GoMaps



March 9, 2017



Sources: Esri, HERE, DeLorme, USGS, Intermap, INCREMENT P, NRCan, Esri Japan, METI, Esri China (Hong Kong), Esri Korea, Esri (Thailand), MapmyIndia, NGCC, © OpenStreetMap contributors, and the GIS User Community

Brookfield Homeowner's Association, Inc.

P.O. Box 143089
Fayetteville, GA 30214
(770) 692-0152
(770) 692-0156 Fax
www.camga.com

November 04, 2016

Robert & Imelda Hills
102 Brooksong Way
Peachtree City GA 30269

RE: 102 Brooksong Way

Dear Robert & Imelda Hills:

On behalf of your Architectural Review Board (ARB), we are pleased to inform you that:

Approval to build an addition on the back of 102 Brooksong Way. The addition will be 10 feet by 14 feet and will tie in to the existing roof line. The siding will match the existing siding. Their neighbors should not be affected by this addition.

As a reminder, the committee's approval of your plans and specifications is not for engineering or structural integrity, but only within their rights and responsibilities with regards to The Declaration of Covenants, Conditions and Restrictions. Also, you are responsible for obtaining any permits that may be required by your local government authority.

We reserve the right to make a final inspection of the change to make sure it matches the Request you submitted for Approval. Please follow the plan you submitted or submit an additional Request form if you cannot follow the original plan.

We appreciate you being a responsible homeowner by following the guidelines of the approval process for your community. If we may be of any future assistance, please feel free to contact us.

Sincerely,

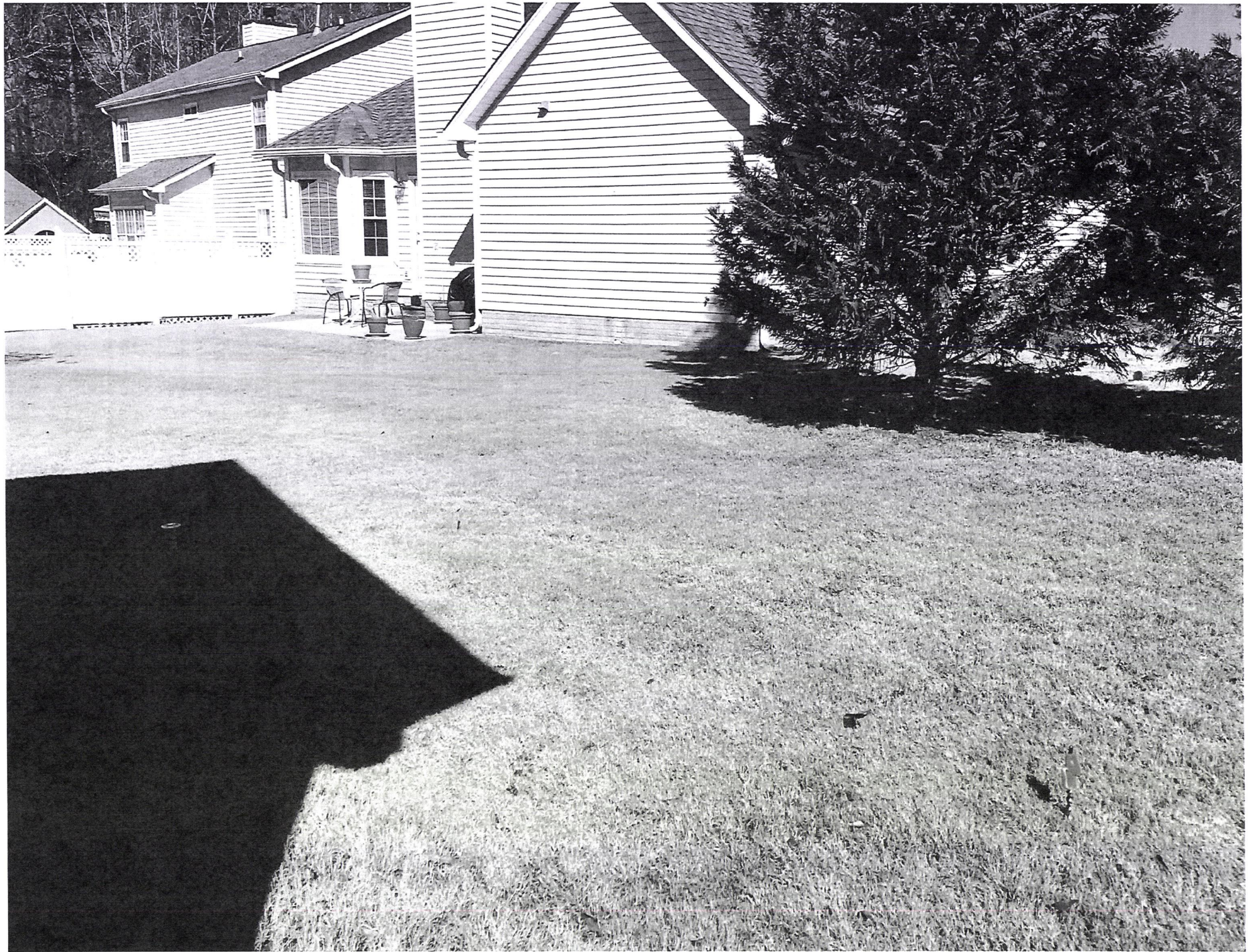
COMMUNITY ASSOCIATION MANAGEMENT, LLC
Agent for Brookfield Homeowner's Association, Inc.

Lee Mason

Lee Mason, CMCA®, AMS®, PCAM®











CITY OF PEACHTREE CITY

INTEROFFICE MEMORANDUM

TO: Mayor and Council Members

VIA: Jonathan N. Rorie, City Manager 

FROM: Betsy Tyler, Public Information Officer/City Clerk 

DATE: March 9, 2017

SUBJECT: PREVIEW of Records Management Policy and Supplemental Retention Schedule
March 16, 2017, City Council Meeting

Like all governmental agencies, the City generates volume of public records each year, whether in paper or electronic format. The City's Records Management Program exists to manage these records (our organizational information) so that it is timely, accurate, complete, cost-effective, accessible, and useable.

Managing records includes the eventual destruction of most records, since maintaining files in perpetuity is not feasible and can be a liability. Under State Law, if the City receives an Open Records Request for records in the City's possession, the City must produce those records. Toward that end, the City's Code of Ordinances (pertinent sections attached) adopts the State Retention Schedule for Local Governments to ensure that public records are disposed of when no longer useful, and are disposed of in a lawful manner.

The State of Georgia publishes and periodically updates its records retention schedule for local governments. By law, local governments cannot destroy records sooner than indicated in the retention schedule, and the City follows this schedule most of the time. The City does retain some records for longer than listed in the State Retention Schedule, but those alternate schedules must be listed and also strictly followed.

Also attached is the City's Records Management Policy and supplemental retention schedule referenced in the ordinance. The state published a revision to their schedule in 2016, and staff has reviewed and updated the policy to reflect these new changes. State schedule changes impacting the supplemental schedule are highlighted in yellow, and staff proposed changes are highlighted in blue.

Several of the changes involve transitioning back to the state schedule (and removal from the supplemental schedule). Some exceptions reflect current operations (HR purges old personnel files after seven years, which is the retention for the majority of the files, rather than multiple times over the years; Municipal Court retains case information for the longer period required for the two types of cases they handle together).

Staff will bring back the policy and ordinance amendment for final approval after the departments have completed their final review and the policy has been reviewed by the Georgia Archives (the current department designated to manage the state's records and retention schedules).

Current Ordinance

DIVISION 2. - CITY COUNCIL MEETING PROCEDURES AND RULES

Sec. 2-39. - Maintenance of council meeting minutes; designation as official record.

The city clerk shall maintain all city council meeting minutes, which shall serve as the official record of the meeting upon adoption by the mayor and council.

ARTICLE VI. - RECORDS MANAGEMENT

Sec. 2-500. - Purpose.

The purpose of this article is to comply with the Georgia Records Act (O.C.G.A. § 50-18-90 et seq.) enacted by the general assembly in 1972, and as the act may from time to time be amended, and to adopt the Records Retention Schedule for Local Government Records as published by the Georgia Secretary of State's Department of Archives and History State of Georgia, and any such amendments or updates as may be made.

Sec. 2-501. - Administrative responsibilities.

The office of the city clerk shall serve as the coordinator of the records management program and is authorized to act for and on behalf of the city in directing and coordinating all records management matters under the Georgia Records Retention Act. In discharging the records management and records destruction duties, the city clerk shall, whether personally or by delegation, maintain all records in accordance with the Secretary of State's Retention Schedules for Local Government Records adopted by the mayor and council, and shall not destroy, allow, or direct any employee to destroy, any record except as provided on the aforesaid retention schedule.

Whenever any records are destroyed, a certificate of destruction shall be prepared and maintained by the city clerk which shall show the type of records destroyed, the approved retention schedule number, and the dates covered. These memoranda of destruction shall be kept by the city clerk's office and may be viewed by any member of the public as provided by law.

Sec. 2-502. - Duties of department heads.

It shall be the duty of each department head to cooperate fully with the records management officer in complying with this article and the provisions of the Georgia Records Act. It shall further be the duty of each department head to implement the records management procedures and regulations issued by the city clerk and the Secretary of State's Department of Archives and History State of Georgia.

Sec. 2-503. - Retention schedule.

The city hereby adopts the Secretary of State's State of Georgia's Retention Schedules for Local Government Records. A copy of such schedule is on file in the office of the city clerk.

Sec. 2-504. - Exceptions to the retention schedule.

Any exceptions made to the Secretary of State's State of Georgia's Retention Schedules for Local Government Records by the city shall be listed in the city's supplemental retention schedule and include the retention time and reason for keeping the documents longer than recommended by the Secretary of State's State of Georgia's Retention Schedules for Local Government Records.

OPR: City Clerk
6/2011

Purpose	Section	I
Policy		II
Objective		III
Scope		IV
Procedures		V

I. Purpose

The purpose of this CAR is to comply with the Georgia Records Act (O.C.G.A. § 50-18-90 et seq.) enacted by the General Assembly in 1972, and as the act may from time to time be amended; to establish a records management policy for the City of Peachtree City; to assign responsibilities; and to provide procedures for departments in the lawful retention and destruction of paper and electronic records. The City's supplemental retention schedule shall be approved by the Mayor and Council and shall remain in effect until changed by the City Council.

II. Policy

It is the City's policy to follow the Retention Schedule for Local Government Records as published by the Division of Archives and History, Office of the Secretary of State, and the exceptions noted in this regulation and as adopted by the City Council on June 2, 2011.

III. Objective

The records management program shall be coordinated by the City Clerk's office. The retention periods in this schedule represent the minimum length of time the records must be retained and shall not be shorter than those mandated by the state. If a particular series of records are required for litigation, audit, or other special administrative needs, it must be retained for as long as needed. When departments identify records that are not addressed by this policy, they must notify the City Clerk and/or Records Manager to establish a retention period. The supplemental retention schedule shall be reviewed and modified periodically to incorporate changes as adopted by the state.

IV. Scope

Each department shall maintain an inventory of the type of records and the length of time each type of record shall be maintained in the office or a record-holding area. Only permanent records and vital records are to be maintained in the City vault.

V. Procedure

Records older than the recommended retention schedule will be purged and destroyed by shredding within a year on an annual basis by the City Clerk or her designee. Records not covered by this schedule should be kept until no longer useful, then destroyed. Documents of historical importance, such as photographs, may be given to the Library after the recommended retention period.

When records are purged for shredding, they shall be placed in a box and the box shall have a list of its contents taped to it. Boxes/lids should not be taped for security purposes.

Each division/department shall send the City Clerk or her designee an electronic file listing the boxes to be destroyed, along with a list of the contents in each box. Any media will be placed in a separate box. Media includes video/audio tapes, computer disks, and dvd/cds.

Vault Storage:

Inner Vault Storage (fireproof/Halon fire suppression system) shall be provided for all permanent records and vital temporary records as follows:

1. Minutes – Vault space will be provided for City Council Minute Books, and for all City Commissions. Vault space will also be made available for minutes of separate governmental entities, such as Authorities and Associations, who do not have secure space to house their minutes.
2. City Council Meeting Packets
3. City Council meeting audio/video files (hard drive)
4. Contracts and Agreements – original copy – Divisions shall provide original copy to City Clerk's office along with a completed "AGREEMENTS & CONTRACTS Archival Cover Sheet," which is included as an attachment to this CAR.
5. Deeds and Easements – City's official copy
6. Legal Opinions
7. Budgets (original)
8. Municipal Court Dockets
9. Human Resources permanent and long-term files

Electronic Records Storage

Electronic records storage (such as the current software program Laserfiche, or successive programs) will be utilized to archive documents in the following manner:

Primary storage – Documents with a retention schedule of less than 15 years per the current State Retention Schedule or approved City supplemental retention schedule, whichever is greatest, may be archived in electronic format only as deemed appropriate for storage and access reasons. All original agreements, contracts, and memorandums of understanding will be stored in the Inner Vault area.

Secondary storage – Documents with a retention schedule of 15 years or greater (including permanent documents such as minutes, ordinances, etc.) per the current State Retention Schedule or approved City supplemental retention schedule, whichever is greatest may, as deemed appropriate, may be archived in electronic format for ease of access to the public, to city staff, and for research purposes and to protect originals. Original documents with a retention schedule of 15 years or greater will be maintained in paper format in the City Hall Vault as the primary means of archiving.

Departments inputting documents into electronic records storage or submitting documents for electronic records storage to the City Clerk Office shall include a completed Archival Information Sheet as designated in the attachment to this CAR.

Secure (but not fire proof) storage shall be provided by Division Directors/Chiefs for records designated as non-permanent until such records are destroyed according to this policy: Such designations currently include Transitory; Temporary - Short Term; and Temporary – Long Term; and shall include any additional classifications adopted by the State of Georgia.

VI. Responsibilities

The City Clerk shall be the designated Records Manager to implement the City's Records Management Program. The City Clerk's Office shall provide copies of the State Retention Schedule and the City of Peachtree City Records Retention Supplement Schedule to all Division Directors/Chiefs, and is responsible for distributing copies of any amendments or revisions. If there is a question regarding the interpretation of the schedules, the Division Directors/Chiefs or their designees shall contact the City Clerk's Office for interpretation or proposed amendments to the City schedule.

The Police Department may provide secure, fire-proof, storage within the Police Department building for any long-term or permanent records maintained in accordance with the departments operating procedures.

Division Directors/Chiefs shall be responsible for the lawful management of departmental records within their division, and for the storage of all documents with a Retention Classification other than "Permanent," which shall be stored in the City Hall Vault. Divisions submitting documents to the City Clerk for storage in the City Hall Vault shall include a completed Archival Information Sheet as designated by the City Clerk's Office.

APPROVED:

Mayor & Council
City Manager
Administrative Services Director
Community Development Director
Financial Services Director
Fire Chief
Leisure Services Director
Police Chief
Public Services Director
City Clerk

City of Peachtree City
Records Retention Schedule Supplement – Exceptions and Documents Not Addressed

For documents not specifically addressed in the State Retention Schedule or for retention of documents longer than recommended in the State Retention Schedule.

Administrative Services Exceptions

Record Title	Description	State Retention	City Retention	Legal Citation / Comparison/Reason	Retention Classification
City Council meeting audio/video recordings	Audio/video files of City Council meetings	No requirement 90 days after minutes are prepared and verified	15 years	EXCEPTION to State Schedule. Reason: for legal reference in case of lawsuit. Approved minutes are official record.	Temporary – Long Term
City Council Meeting Packets	Staff memos, meeting presentations provided to Mayor & Council prior to their meetings	No requirement 5 years	Permanent, in electronic format when possible	EXCEPTION to State Schedule. Reason: Minutes often reference documents provided or presentations made at Council meetings	Permanent
Court Tapes	Audio tapes & digital recordings of Municipal Court proceedings	No requirement	2 years	EXCEPTION to State Schedule. Reason: for legal reference in case of appeal. Calendar/Disposition is official record	Temporary – Short Term
Court Dockets; Misdemeanor Court Records-Case Files	Books which generally contain essential information in summary form about each traffic case adjudicated; Documents supporting the adjudication of a case	Dockets-10 years after last entry; Misdemeanor Court Records-20 years after closure	20 years	EXCEPTION to State Schedule. Reason: Misdemeanor records are kept in the same docket as traffic offenses, so dockets must be kept for the longer time period.	Temporary-Long Term

Golf Cart Registration Forms	Forms documenting the registration, transfer, and release of golf carts	No Reference	5 years after decal replacement implemented 3 years after decal replacement/renewal	SUPPLEMENT to State Schedule. Reason: State retention for motor vehicle tag registration is 3 years; retaining for 5 years ensures records for all previous registration of currently tagged carts.	Temporary – Short Term
Campaign Forms	Campaign Contribution Disclosure Reports and Financial Disclosure Reports filed by elected officials and candidates	5 years	5 years after failed election or after leaving office	EXCEPTION to State Schedule. Reason: Forms are retained in the candidate/elected official file that remains active until election is over and candidates leave office	Temporary – Short Term (NOTE: Only applicable to forms received prior to 2011 filing with State Ethics Commission).

Community Development Exceptions

Record Title	State retention	City Retention	Legal Citation / Comparison/Reason	Retention Classification
Certificate of Occupancy	10 years Life of building	Permanent to permit file	EXCEPTION to State Schedule. REASON: Continuity and accurate history of property.	Permanent
Demolition records	5 years	Permanent to permit file	EXCEPTION to State Schedule. REASON: Continuity and accurate history of property.	Permanent
Street Address Lists	Retain for useful life	Permanent	EXCEPTION to State Schedule. REASON: Continuity and accurate history of property.	Permanent
Appeals to Zoning Board decisions	5 years	Permanent	EXCEPTION to State Schedule. REASON: Continuity and accurate history of property.	Permanent
Zoning change requests	5 years	Permanent	EXCEPTION to State Schedule. REASON: Continuity and accurate history of property.	Permanent
Zoning litigation files	20 years 6 years after litigation complete	Permanent	EXCEPTION to State Schedule. REASON: Continuity and accurate history of property.	Permanent

Fire Department

Record Title	State retention	City Retention	Legal Citation / Comparison/Reason	Retention Classification
Building Fire Inspection & Certificate of Occupancy (Compliance) Files	Varied Inspections – 5 years	25 years	EXCEPTION to State Schedule. – Records documenting the inspection and certification of buildings for compliance with fire and safety law REASON: Georgia Archives State Agency Specific Schedules for Office of the Commissioner of Insurance.	Temporary-Long Term

Police Department Exceptions

Record Title	State retention	City Retention	Legal Citation / Comparison/Reason	Retention Classification
Investigations Logs	2 years	6 years	EXCEPTION to State Schedule. REASON: Retained for Accreditation and State Certification on on-site inspections	Temporary – Short Term
Subpoena Logs – Officer	3 years <u>after disposition of case</u>	6 years	EXCEPTION to State Schedule. REASON: Retained for Accreditation and State Certification on on-site inspections.	Temporary – Short Term
Daily/Monthly Activity Reports	2 years	Until next accreditation / certification review	EXCEPTION to State Schedule. REASON: Retained for Accreditation and State Certification on on-site inspections.	Temporary – Short Term
Applications for Employment – Not Hired	2 years	Until next accreditation / certification review	EXCEPTION to State Schedule. REASON: Retained for Accreditation and State Certification on on-inspections.	Temporary – Short Term

Human Resources – Exceptions – Terminated Employee Files

* Terminated files are purged ~~five (5)~~seven (7) years after termination date. Any files required to be kept longer than five (5) years Only Retirement/Pension files become a permanent part of the file record. They are not purged again.

Record Title	Description	State Retention	City Retention	Legal Citation / Comparison/Reason	Retention Classification
Section 125 forms	Cafeteria Plan for premiums on medical, dental or short-term disability	6 years <u>after termination of participation</u>	Permanent <u>7 years after termination of employment</u>	EXCEPTION to State Schedule.* REASON: Part of Permanent terminated employee files. <u>Removal during 7-year purging of personnel files</u>	Permanent <u>Short-Term - Temporary</u>
Employment contracts		7 years after expiration	Permanent	EXCEPTION to State Schedule.* REASON: Part of Permanent terminated employee files.	Permanent
Performance evaluations		7 years after separation	Permanent	EXCEPTION to State Schedule.* REASON: Part of Permanent terminated employee files.	Permanent
Disciplinary actions		7 years	Permanent	EXCEPTION to State Schedule.* REASON: Part of Permanent terminated employee files.	Permanent
All references		7 years	Permanent	EXCEPTION to State Schedule.* REASON: Part of Permanent terminated employee files.	Permanent
Training certificates		7 years <u>5 years</u>	<u>7 years after termination of employment</u> Permanent	EXCEPTION to State Schedule.* REASON: Removal during 7-year purging of personnel files <u>Part of Permanent terminated employee files.</u>	Permanent <u>Short-Term - Temporary</u>
Birth certificate		No requirement	<u>7 years after termination of employment</u> Permanent	EXCEPTION to State Schedule.* REASON: Removal during 7-year purging of personnel files <u>Part of Permanent terminated employee files.</u>	<u>Short-Term - Temporary</u> Permanent
Death certificate		No requirement	<u>7 years after termination of employment</u> Permanent	EXCEPTION to State Schedule.* REASON: Removal during 7-year purging of personnel files <u>Part of Permanent terminated employee files.</u>	<u>Short-Term - Temporary</u> Permanent
Retirement/pension information		Permanent	Permanent	EXCEPTION to State Schedule.* REASON: Part of Permanent terminated employee files.	Permanent

All 457/Deferred Compensation forms		7 years <u>after benefits end</u>	Permanent	EXCEPTION to State Schedule.* REASON: <u>Part of Permanent terminated employee files; Part of Retirement / Pension File</u>	Permanent
<u>Death benefit claims</u>		<u>30 years</u>	<u>Permanent</u>	EXCEPTION to State Schedule.* REASON: <u>Part of Permanent terminated employee files;</u>	<u>Permanent</u>
Short-term disability claims		<u>30 years FMLA-3 years after separation; non-FMLA-3 years</u>	<u>7 years after termination of employment</u> Permanent	EXCEPTION to State Schedule.* REASON: <u>Removal during 7-year purging of personnel files; Part of Permanent terminated employee files;</u>	<u>Short-Term – Temporary</u> Permanent
Long-term disability claims		<u>30 years FMLA-3 years after separation; non-FMLA-3 years</u>	<u>7 years after termination of employment</u> Permanent	EXCEPTION to State Schedule.* REASON: <u>Removal during 7-year purging of personnel files; Part of Permanent terminated employee files;</u>	<u>Short-Term – Temporary</u> Permanent



AGREEMENTS & CONTRACTS
Archival Cover Sheet

The following information will be provided for all contracts and agreements to be stored in the City Vault and archived per the City's Records Management policy and ordinance:

Contract/Agreement Name: _____

First Party: _____

Second Party: _____

Additional Parties: _____

Creation/Effective Date: _____ **Expiration Date:** _____

Automatic Renewal? ☐ YES ☐ NO

Explanation of Renewal Terms: _____

Additional Information/Comments: _____

Retention: ☐ 7 years after expiration

☐ 10 years after expiration (Capital Projects Only)