



Union County Manager's Annual Report 2015







from the County Manager

I am pleased to provide Union County's FY 2015 Annual Report to the residents of Union County. Fiscal Year 2015 was a great year for Union County.

This year's report is organized by the categories included in my annual Plan of Work:

- **Public Safety**
- **Fiscal Sustainability**
- **Building Community Consensus**
- **Planning and Economic Development**
- **Efficient & Effective Service Delivery**



Cynthia A. Coto
County Manager

These are the areas that guide and prioritize decision making for our organization. As you familiarize yourself with the document, you will learn more about the work that we have completed during Fiscal Year 2015 in our continuous effort to maintain Union County's reputation as a great place to live and work.

The areas of excellence that we have chosen to highlight are only a small part of the day-to-day work that our staff does each and every day; and I hope it provides you with useful information regarding your County government. As part of my continued effort to maintain a transparent and responsive organization, you can contact me at any time by email at askthecountymanager@UnionCountyNC.Gov.

Cynthia A. Coto



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Union County Board of Commissioners

The Board of County Commissioners is the chief administrative and policy making body of Union County and consists of five members, elected at-large. Commissioners serve four-year staggered terms. During its first meeting of December, the Chairman and Vice Chairman are elected by and from the Board of Commissioners. In 1965, the Union County Board of Commissioners voted to choose the Commissioners/Manager form of government and appointed the first county manager.

From left to right: Lance Simpson, Stony Rushing, Richard Helms, Frank Aikmus and Jerry Simpson



Union County

County Formed: 1842

County Seat: Monroe

Municipalities: Fairview, Hemby Bridge, Indian Trail, Lake Park, Marshville, Marvin, Mineral Springs, Monroe, Stallings, Unionville, Waxhaw, Weddington, Wesley Chapel and Wingate

Square Miles: 640

Population: 212,756 (2013)

Median Household Income: \$64,953

Government Services

- Central Administration
- Community Services
- Human Services
- Emergency Services
- Growth Management
- Public Works
- Administrative Services
- Human Resources
- Tax Administration



Public Safety

EMS Agreement

The Union County Board of Commissioners approved an amendment to the Emergency Medical Services Agreement between Union County and Carolinas HealthCare System (CHS) that will extend emergency medical services provided by Union-EMS until June 30, 2017.

Union-EMS has provided emergency medical services to Union County since 1997. Prior to 1997, Union County operated Emergency Medical Services as a department of County government. In April of 1997, the County outsourced these services by entering into an agreement with CHS.

Following many extensions of the original agreement and after reaching a decision to enter into a long-term agreement with CHS in order to provide program stability, the Board of Commissioners established a working group of fire chiefs, EMS personnel, County staff, CHS staff and community members to evaluate data, response plans, cost, and reporting procedures associated with emergency medical services. Because the original agreement was scheduled to expire on Oct. 31, 2014, it became necessary for the parties to negotiate a new agreement prior to the end of October.

The new agreement provides for a three-year term with either party having the right to terminate on one year's written notice. It further provides for the parties to resolve the EMS budget through the annual budgetary process and for performance standards to be determined annually based on the amount of funding available. At the time of its adoption, it was anticipated that the new agreement would be amended to reflect the performance standards reached by consensus of the working group.

On Nov. 17, 2014, the chair of the working group reported the group's findings to the Board of Commissioners. The result of the committee's work provided a model that was neighborhood-based Advanced Life Support service and provided consistent service levels throughout the entire county. The Board directed staff to negotiate the amendment to the base contract to reflect the committee's recommendations on the necessary metrics.

Public Safety Staff Achievements

- Union County Sheriff's Office Capt. Jeff Outen was selected as the N.C. Outstanding Crisis Intervention Team (CIT) Officer of the Year by the North Carolina CIT Conference Planning Committee.
- Union County Sheriff's Deputy Jonathan Philemon received the 2015 NC Child Passenger Safety Advocate Award by the NC Governor's Highway Safety Program
- Lt. John Gore of the Union County Sheriff's Office graduated from the FBI National Academy in Quantico, Virginia.
- Deputy Stephanie Harms was recognized as School Resource Officer of the Year for the 2014-2015 school year! Deputy Harms is the SRO for Parkwood Middle School.
- Union County Emergency Communications Telecommunicator Chelsea Boulton received the Sandy Marsh Award as Union County Telecommunicator of the Year. The award is given in memory of former county dispatcher Sandy Marsh who lost her battle with cancer two years ago.

Fiscal Sustainability

Financial Highlights

- The Government Finance Officers Association of the United States and Canada (GFOA) presented Union County's Administrative Services' Budget and Finance divisions with the Distinguished Budget Presentation Award, Certificate of Achievement for Excellence in Financial Reporting, and Outstanding Achievement in Popular Annual Financial Reporting.
- Union County received an unmodified or clean opinion that its financial statements were fairly presented in conformity with general accepted accounting principles. This opinion is the highest form of opinion that the external auditors can express on the presentation of Union County's financial statements.
- Standard & Poor's, a firm that provides independent assessments of the credit risk associated with buying and holding bonds, raised its long-term and underlying ratings on Union County's general obligation (GO) debt to AA+ from AA-. Standard & Poor's raised its long-term and underlying ratings on the County's limited-obligation bonds and certificates of participation (COPs) to AA from AA-. The outlook on all the ratings is stable.

Award Winning Chief Financial Officer

Union County Executive Director of Administrative Services and Chief Financial Officer Jeff Yates was named CFO of the Year for Midsized Government Agencies by the Charlotte Business Journal.

Awards were presented to finance professionals in the Charlotte region who exemplify excellence as corporate financial stewards in the following categories: Public Company, Private Company, Small Nonprofit/Government, and Midsized to Large Nonprofit/Government.

Yates has been with Union County since September 2012. He manages Union County's Accounting, Budget, Procurement, Information Technology and Debt Management divisions.

Yates designed the County's zero-base budget process allowing the County to develop a balanced budget and provide transparency throughout the process. In addition to the process, Yates developed and wrote a software application to facilitate this process.

Yates has worked to transition the County's debt portfolio from a higher risk, derivative based portfolio, to a lower risk fixed rate structure. This transition allowed a realized savings of more than \$1.5 million annually.

Yates has developed ongoing modeling to analyze the long-term financial impact of Board of County Commissioners' policies. This impact modeling ensures that as the Board of County Commissioners makes decisions, the

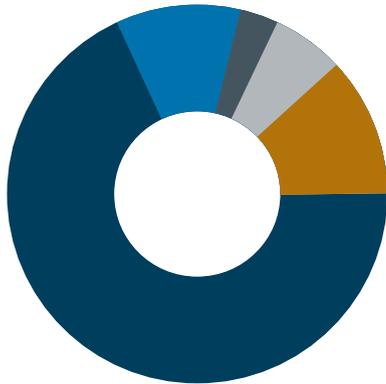
Commissioner Richard Helms honors Jeff Yates for being named Chief Financial Officer of the Year.

long-term fiscal sustainability can be known. This modeling has helped to shape policy and decision making in the organization and helped to ensure services and low tax rates in the community. In addition, this focus on sustainability has directly contributed to the County's most recent bond rating upgrade from Standard & Poor's rating agency.

Yates has worked through improved documents, websites, YouTube videos, and other areas to provide a heightened level of transparency to the financial dealings of Union County. This transparency allows the residents to understand where their tax dollars are spent and helps to build trust with the community as a whole.



Revenues, By Source



- Ad Valorem Taxes (69%)
- Local Option Sales Tax (12%)
- Sales, Services, Permits and Fees (3%)
- Other (4%)
- Investment Earnings (0%)
- Intergovernmental (12%)

General Funds

Total Revenue

\$272,413,570

Union County relies heavily on ad valorem taxes (taxes collected on physical and personal property) to fund County services.

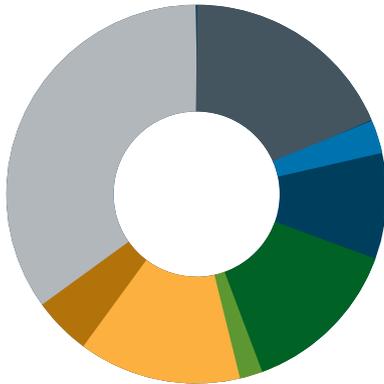
69%

In FY 2015, ad valorem tax accounted for 69% of all revenues collected by the General Fund.

12%

The County's second largest revenue source is Local Option Sales Tax at 12%.

Expenditures, By Use



- Public Safety (16%) ■ Economic & Physical Dev. (1%)
- Human Services (17%) ■ Cultural & Recreational (3%)
- UCPS Operations (38%) ■ UCPS Debt Services (19%)
- General County Debt Services (1%)
- General Government (5%)

General Funds

Expenditures

\$270,413,570

Public Safety [16%] and Human Services [17%] both require significant funding for the services they provide.

38%

With roughly 42,000 students, or nearly one in every five residents of the county attending primary school and South Piedmont Community College, education continues to drive expenditures at 38%.

19%

Union County Public School debt service is the second largest expenditure of the County at 19%.

Building Community Consensus



Consolidated Human Services Board Reestablished

The Union County Board of Commissioners approved the reestablishment of the Consolidated Human Services Board (CHSB).

Before reestablishment of the CHSB, the Union County Board of Commissioners exercised the powers, responsibilities and duties of the Human Services Board.

The Consolidated Human Services Board has no more than 25 members, reasonably reflects the population makeup of the county, includes only residents of the county, and includes at least four consumers of human services, eight professionals that include the following: psychologist, pharmacist, engineer, dentist, optometrist, veterinarian, social worker, nurse, two physicians licensed to practice medicine in the state, one who is a psychiatrist, one county commissioner, and other persons, including members of the general public representing various occupations.

Serving Our Residents

- Union County Veterans Services moved from the 6th floor of the Union County Government Center to its new location at the Historic Post Office located in the courtyard at 407 North Main Street in Monroe.
- The Union County Board of Commissioners adopted a Water Conservation Ordinance and Water Shortage Response Plan for Union County Public Works' customers.
- Public Works began construction of an 1.5 million gallon elevated water tank on Hemby Road in Weddington. The 170-foot tall water tank, which is on schedule to be completed in May 2016, will provide more consistent, sustainable water pressure for Public Works' customers and their families in the Weddington and Marvin areas.

Planning/Economic Development

Economic Development Achieves Milestones

Monroe-Union County Economic Development had its best 12-month run of capital investment in Union County history in FY2014-15 while the county maintained the lowest unemployment in the Charlotte region for the 16th straight year.

Monroe and Union County is recognized as a Top 5 Boeing Suppliers Location, Top 10 Place to Reshore Manufacturing Facility Near Major Airport and Top 10 "No Brainer" Manufacturing Location. Industry establishment, retention and expansion included:

- Harris Teeter will expand the perishable facility at its existing Distribution Center in the Town of Indian Trail that will create approximately 41 jobs and \$5.5 million in new capital investment in Union County.
- Scott Safety is starting a \$28.7 million expansion in Monroe.
- Allegheny Technologies Incorporated will invest approximately \$70 million in new building and new equipment at their complex in Monroe.
- Glenmark Pharmaceuticals Ltd; a research-driven, global, integrated pharmaceutical company plans to set up a new manufacturing facility at Monroe Corporate Center.
- Carolina Wood Products of Marshville was awarded a 2015 Recycling Business Development Grant from the Recycling Business Assistance Center, a division of the NC Department of Environment and Natural Resources.
- O'Neil Digital Solutions will invest approximately \$140 million in building improvements and new equipment at a facility in Monroe over the next 10 years (\$90.7 million in the first five years).

Unified Development Ordinance Created

Union County's Unified Development Ordinance (UDO) was adopted in October 2014. The UDO is a combination of development regulations assembled in one document. It includes zoning, subdivision, floodplain regulations and development standards for residential and nonresidential development in unincorporated Union County.

Efficient/Effective Service Delivery



Public Works employees service a fire hydrant in local neighborhood.

Employee Survey

Workplace Dynamics administered an employee survey in 2015 to which 718 employees responded. This survey was the first comprehensive survey administered in more than 15 years. With 78 percent of the County's workforce providing responses, the survey was considered a tremendous accomplishment.

There were many positive areas highlighted in the survey:

- Meaningful Jobs – 74 percent of employees agree that their job makes them feel they are part of something meaningful.
- Strong middle managers – all areas regarding middle management scored above benchmark.
- Training – there were strong scores in new employees indicating good on boarding.

There are also opportunities and challenges:

- Top management team alignment and communication on direction and values.
- Efficiency improvements to meet increased workload with a disproportionately growing employee population.
- Negativity and low engagement pockets.

Following analysis of the data, a plan of action was developed in partnership with Workplace Dynamics. This plan of action will begin to help us see improvements and positive momentum.

The following includes the initial steps:

- County Manager meetings with all employees – from August through October, the County Manager conducted 40 meetings with employees from every section of the organization (excluding Sheriff, Register of Deeds and Elections).
- Top Management Alignment – on August 4 a work session facilitated by Tom Devane from Workplace Dynamics was held with Division Directors.
- A two-day work session was held with the County's Leadership Team. This session was utilized to develop a plan that moves the Leadership Team in a positive direction that instills confidence from the entire organization. The first part of the retreat was spent learning about each other and our management styles and the remainder of the two days establishing objectives and action plans to further the work needed to take the organization to the next level.

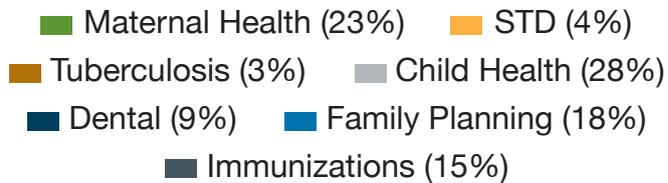
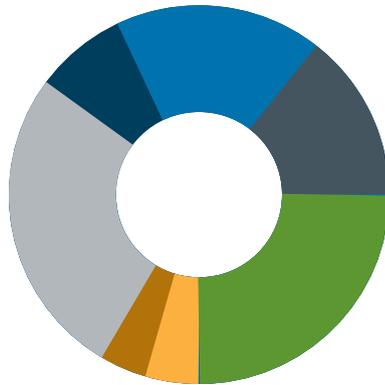
Additional next steps include:

- Division Director work session with Workplace Dynamics Consultant.
- Development and implementation of a Countywide Communication Plan in which we will seek employee input.
- Working with specific departments on improvement areas as identified in the survey.

Employee Accomplishments

- Crystal Crump Wins Two Awards – Outstanding Register of Deeds and Eunice Ayers Distinguished Service Award from NC Association of Register of Deeds.
- Jackie Morgan, Union County Division of Public Health's Health Promotions Supervisor, has received a Public Health Staff Recognition Child Health Recognition Award by the North Carolina GlaxoSmithKline Foundation.

Human Services Delivery Data



Total

Public Health Visits

20,700

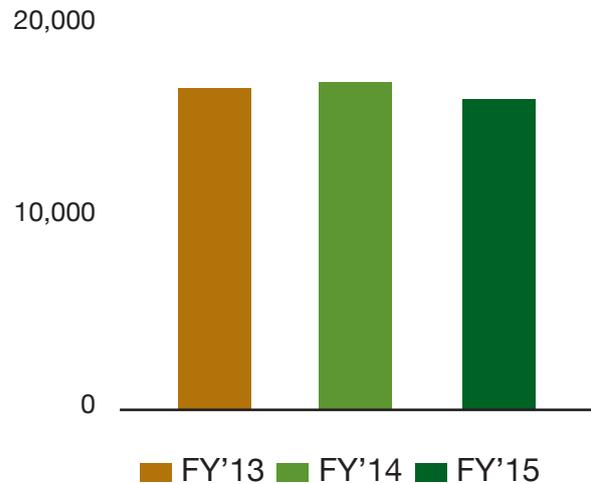
More than 20,700 residents of Union County visited Public Health Clinics.

Total Client Contacts

Veterans Services

15,000

Veteran Services had more than 15,000 contacts (phone calls and appointments) with veterans.

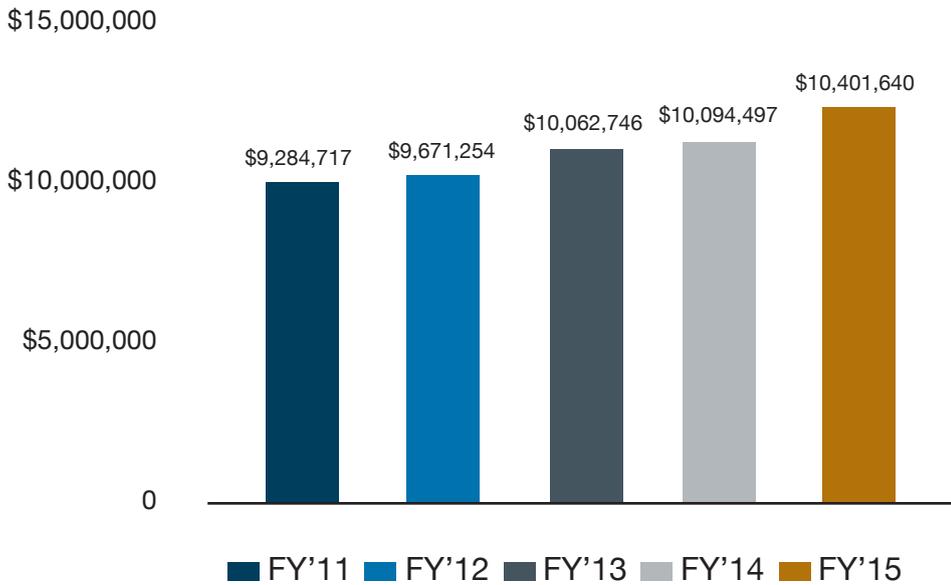


Total

Child Support Collections

12%

Division of Social Services child support collections were up 12%.



Total

Hot Meals

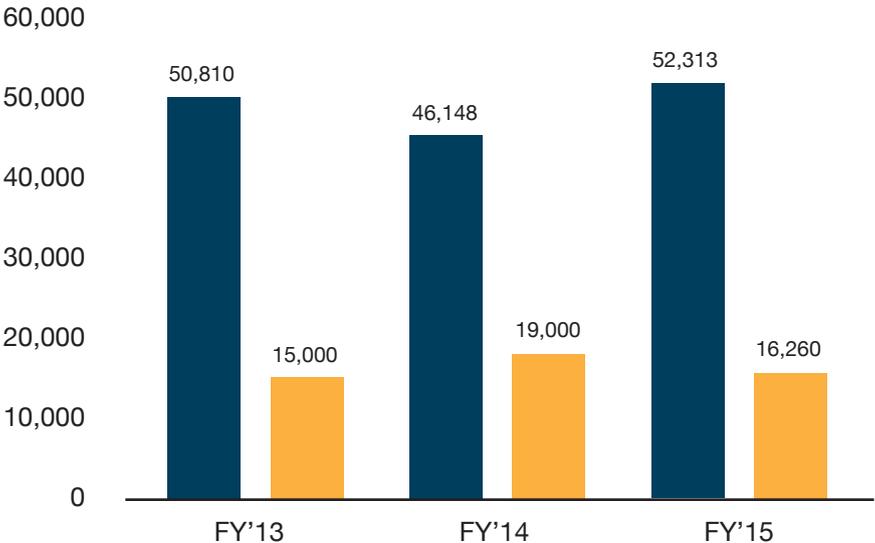
52,000

Served to senior adults

Supplemental Meals

16,000

Served to senior adults



- Hot Meals (Home-Delivered, Congregate)
- Supplemental Meals (Ensure Plus)

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Union County
Government



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