



DURHAM COUNTY NC

APPROVED BUDGET

FY 2020-21

**DURHAM COUNTY, NORTH CAROLINA
FY 2020-21 APPROVED BUDGET**

BOARD OF COUNTY COMMISSIONERS



Wendy Jacobs, Chair



James Hill, Vice-Chair



Heidi Carter



Brenda Howerton



Ellen W. Reckhow

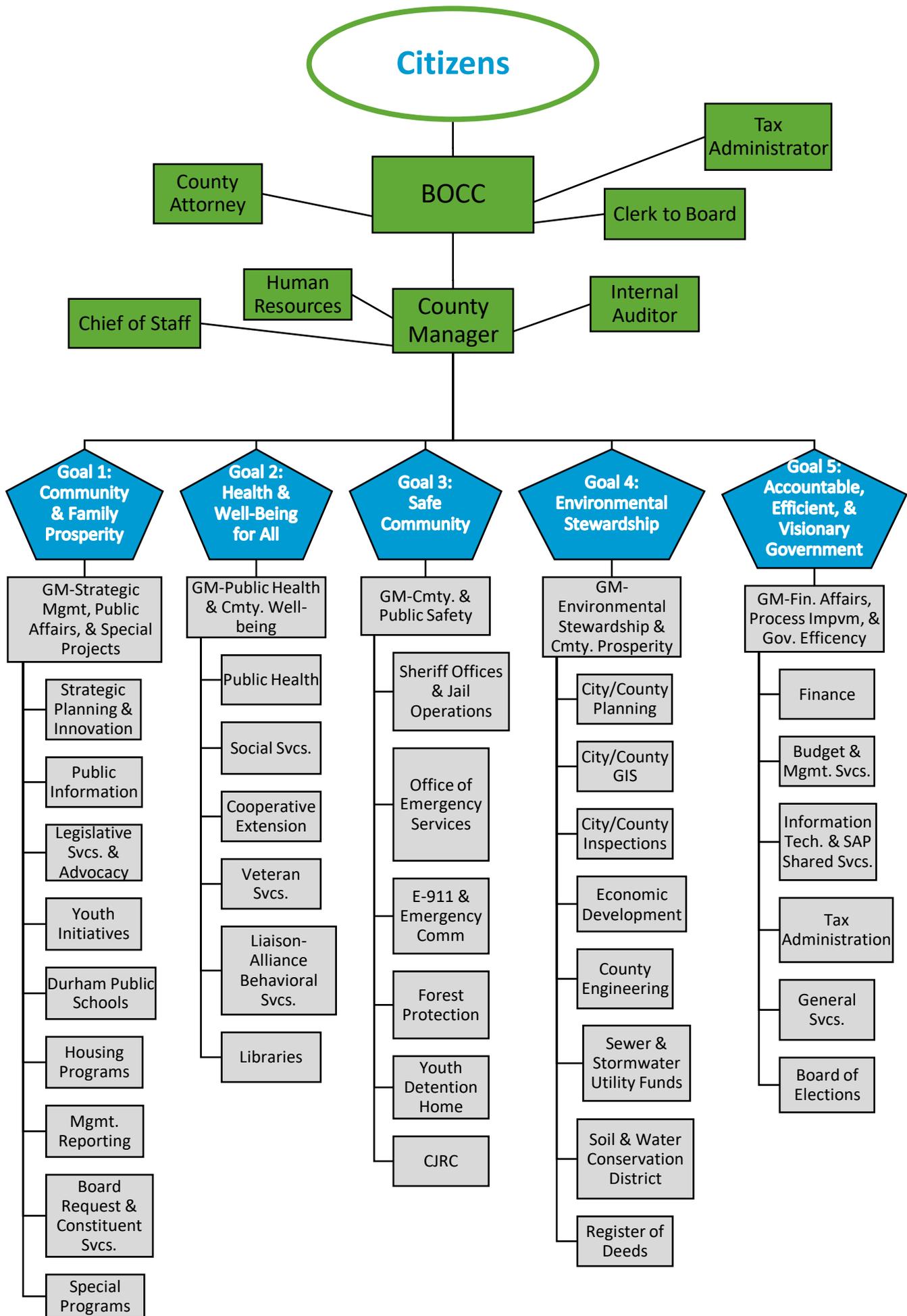
COUNTY OFFICIALS

Wendell M. Davis, County Manager
Claudia Hager, General Manager
Jay Gibson, General Manager
Jodi Miller, General Manager
Joanne Pierce, General Manager
Deborah Craig-Ray, General Manager

Drew Cummings, Chief of Staff
Lowell Siler, County Attorney
Monica Toomer, Clerk to the Board
Susan Tezai, Chief Financial Officer

BUDGET AND MANAGEMENT STAFF

S. Keith Lane, Budget Director
David Ades, Assistant Budget Director
Jonathan Yeomans, Budget Analyst
Matt Hunt, Budget Analyst
Shannon Wright, Budget Analyst
Anna Hawksworth, Budget Analyst
Bethany Shewmaker, Performance Analyst



History

Durham began as a railroad station and settlement named for Dr. Bartlett Durham. While the official birth date is April 26, 1853, when the U.S. Post Office was established, the town was not incorporated until April 10, 1869. The tobacco manufacturing industry focused worldwide attention on the area after the Civil War. As a result of this thriving business, Durham grew and prospered tremendously.

In 1881, Durham officials sought to become an autonomous political subdivision and decided to separate from Orange County. Durham County was formed on April 17, 1881 from portions of land transferred into the County from Wake and Orange counties. In 1911, an additional portion of land was transferred into the County from Wake County.

The first Board of County Commissioners convened its initial meeting on May 2, 1881. Durham County operated under the Commission form of government with the chairman serving as chief administrator until 1930. The manager form of government was then adopted and D.W. Newsome became the first manager of Durham County, serving until his death in 1949. E.S. Swindell, Jr. succeeded him and served until his retirement in December 1984. John P. Bond, III was named County Manager and served until his resignation in January 1991. George H. Williams became the fourth County Manager and served until October 1995. David F. Thompson served as fifth County Manager from May 1996 until February 2000. Michael M. Ruffin was the sixth county manager. He retired after 13 years of service in January 2014. Wendell M. Davis, former Deputy Manager of 12 years, is the seventh and current County Manager.

Organizational Overview

Policy-making and legislative authority are vested in the Board of County Commissioners consisting of the chairman, vice-chairman and three members. The governing board is responsible, among other things, for passing ordinances, adopting the budget, appointing committees, and hiring the County Manager, Attorney, Clerk to the Board, and Tax Administrator. The County Manager is responsible for carrying out the policies and ordinances of the governing board, overseeing the day-to-day operations of the government, and supervising the directors of various departments. Board members serve four-year terms. The chairman and the vice-chairman of the board are voted on by the board during the first meeting in December after being sworn into office. In addition, the Sheriff and Register of Deeds are elected County positions.

Durham County provides a full range of services, including Sheriff and Fire Protection, Emergency Medical Services, Human Services (Public Health, Mental Health and Social Services), Elections, Register of Deeds, Animal Control, Youth Home, Criminal Justice, and Culture and Recreation Services. Funding is provided for Educational Services of the Durham Public Schools and Durham Technical Community College. Also, the County funds services provided in conjunction with the City of Durham through inter-local agreements, including Economic and Physical Development, Emergency Communications, Environmental Engineering and Inspections.

Economy

Durham is home to North Carolina's famous Research Triangle Park (RTP), which was formed in 1959 by Duke University in Durham, North Carolina State University in Raleigh, and the University of North Carolina at Chapel Hill. Most of the currently-developed portion of RTP, 75% of its 6,800 acres, is in Durham County. RTP is home to more than 50 major research and development organizations, including IBM and GlaxoSmithKline.

The success of RTP is evidenced by the growth of Durham County as a major center for healthcare activity and as a focal point for high technology research business. Research being conducted in Durham County covers a broad range of fields, such as biotechnology, medical instrumentation, health care products, metallurgy, electronic hardware, software, digital switching, digital transmission, electronics, and telecommunications. Other leading organizations are located in the northern section of Durham County, such as Merck and BioMérieux manufacturing locations, representing a significant investment in Treyburn Corporate Park.

Quality of Life

Durham County today has evolved from an agricultural and manufacturing economy to achieve world-class status. It has become one of the country's most desirable places to live. In 2019, *U.S. News & World Report* ranked the Raleigh-Durham-Chapel Hill area #10 out of 125 U.S. Metro Areas for best places to live. In May of 2019, Wallet Hub listed Durham as #7 out of 100 large cities across the United States to start a Business (ranking Durham very high in "Access to Resources"). In April 2018, *Growella* ranked Durham, NC #1 as Best Cities for Millennials in the U.S. And, in April 2018, Forbes ranked the Research Triangle Area #1 on its List of the Best Places to Rent.

General

Incorporated in **1881**

Form of Government
Commission-Manager



Land Area
286^{SQ} MI



Elevation
332^{FT}



Climate*
Mean Temperature
59°F



Mean Annual Rainfall
48"



* Source: www.usclimatedata.com

Raleigh, **Durham** and Chapel Hill (Triangle) are Ranked as Number **10** in the **125 BEST PLACES** to Live in the United States*



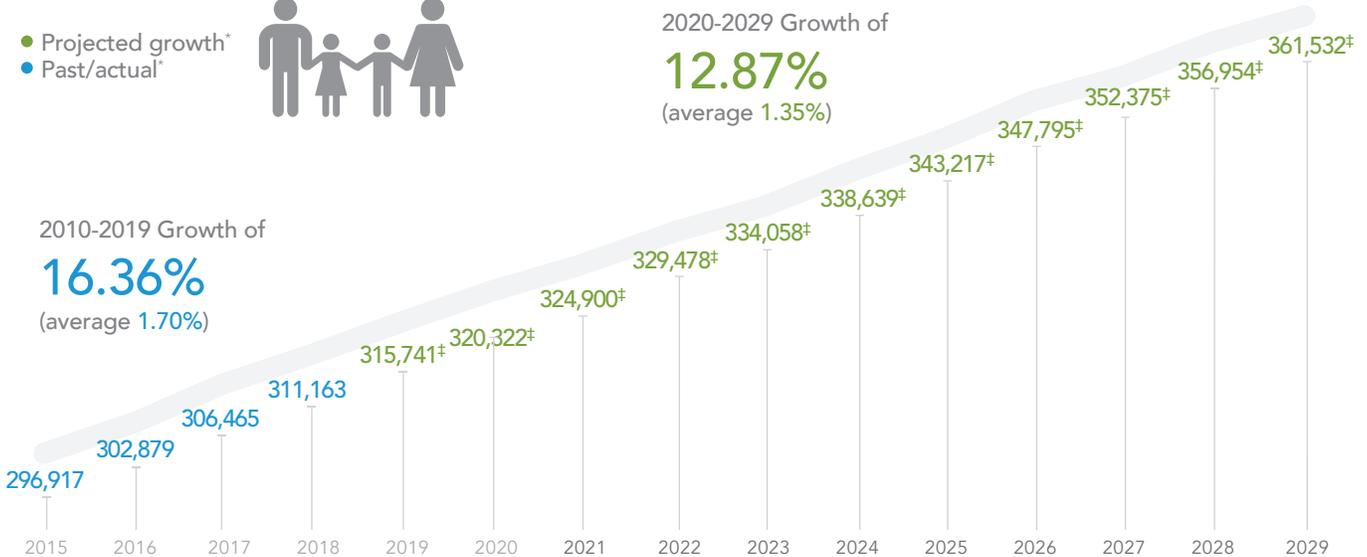
* Source: 2019 US News and World Report

Population

● Projected growth*
● Past/actual†



2020-2029 Growth of
12.87%
(average 1.35%)



* Source: North Carolina Office of State Budget and Management † Projection

Education

Higher

11 Universities and Colleges



Public

29 Elementary Schools **9** Middle Schools

11 High Schools **7** Other



Libraries

7 Locations



3 Vehicle Programs:

Technology Vehicle, Bookmobile Vehicle, and Older Adult Service Vehicle

Age Breakdown

Percentage Population by Age (20-44) Compared to Similar Counties*



* Source: Fact Finder, United States Bureau of Census

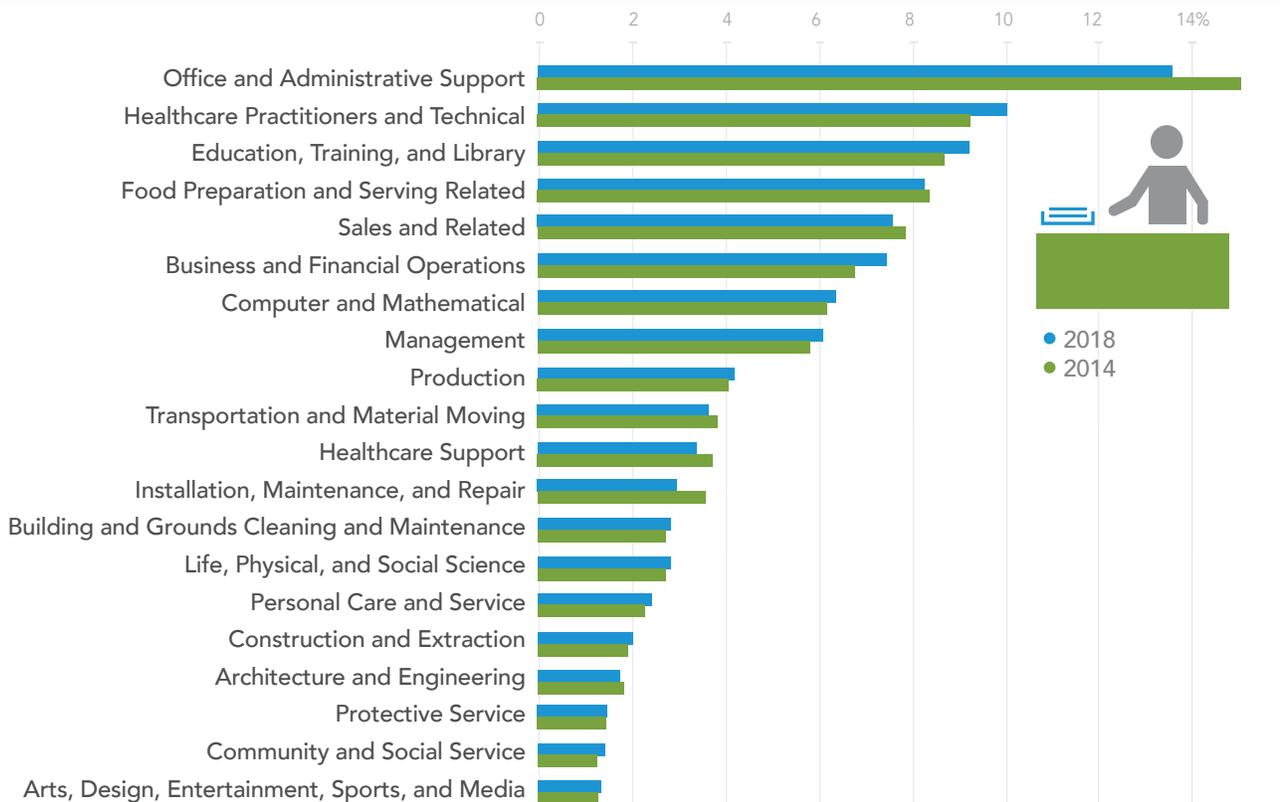
Registered Voters**

231,260



** Source: Durham County Board of Elections

Employment Rate by Type of Occupation*



* Source: United States Department of Labor, Bureau of Labor Statistics – Southeast Information Office

Public Safety

Sheriff Protection

5 Stations



417 Officers 186 Law Enforcement
231 Detention



Fire Protection

3 County Volunteer Fire
Departments Operating
out of 8 stations



READER'S GUIDE

This section is designed to help the reader understand the budget by explaining how the document is organized. This document is a financial plan for Durham County government operations for the July 1, 2020 through June 30, 2021 fiscal year and shows how funds are allocated and how they will be spent.

Important Information for the FY 2020-21 Approved Budget Document

Due to extended periods of system and data unavailability related to the County's March 2020 cyberattack and additional demands and constraints on departments stemming from the County's COVID-19 response, there are some aspects of this document that have changed. Some of these changes include:

- For the first time, the document was developed this year with the intent to be viewed electronically (on a screen); therefore, the resolution of some of the tables may be less clear when printed.
- Data for FY 2019-20 department year-end estimates are being finalized and have been removed from this document. An end-of-year (EoY) summary document will be produced in the fall of 2020.

FUND STRUCTURE

The Durham County operating budget is organized into funds with corresponding tabs in this document. The **General Fund** is the primary fund where most County services are accounted. The General Fund is further divided into functional areas, which include General Government, Public Safety, Transportation, Environmental Protection, Economic/Physical Development, Human Services, Education, and Culture and Recreation.

Each functional area is comprised of at least one business area which represents either a County department or a budgetary unit. Within each business area, there may be one or more fund centers in which funds are budgeted to show the expenditures and revenues associated with a particular program within a County department, or activity within a budgetary unit. Each department or program summary contains a description, accomplishments of the past fiscal year and/or budget highlights where applicable, performance measures, a budget summary, and the number of authorized personnel in Full-Time Equivalent (FTE) positions. Departments with more than one program have a business area summary sheet that precedes the programs.

Each fund center is represented by a summary of appropriations in the following categories of expenditures:

- **Personnel Services** in this document refer to the costs associated with personnel, such as salaries and benefits.
- **Operating Expenses** in this document refer to the costs of daily operations such as office supplies, travel, telephone, etc., for a department or program.
- **Capital Outlay** refers to a fixed asset with an estimated purchase price of \$5,000 or more and a useful life of more than one year. These items typically include furniture, office equipment, automobiles, and other capital equipment. Items in excess of \$100,000 with a useful life of 20 years, such as buildings, are included in the Capital Improvement Plan (CIP).

The remaining budgeted funds are described below.

Other General Funds

Risk Management Fund: This fund focuses on minimizing operational risks and promoting workplace safety.

SWAP Fund: This fund represents a complicated financial agreement based on outstanding debt that brings in over \$2.75 million in revenue to the County each year. The revenue is used to offset yearly debt service payments.

Reappraisal Reserve Fund: This fund recognizes a State statute requiring funds to be reserved and budgeted for future reappraisals to ensure adequate resources for this less-than-annual recurring expense. The creation of the fund in this way is in accordance with the Government Accounting and Standards Board (GASB) best practice.

Capital Financing Plan Fund: This fund accounts for financial resources to be used for the acquisition, construction, and/or improvement of major capital facilities. The capital projects fund also is used to accumulate funds to finance a CIP.

Benefits Plan Fund: This fund represents the budget for the benefits offered to eligible County employees and retirees.

The Law Enforcement Officers' Special Separation Allowance (LEOSSA) Fund: The fund accounts for the activities of the Public Safety Employees Retirement System, which accumulates resources for pension benefit payments to qualified Public Safety employees.

Debt Service Fund

The **Debt Service Fund** is used to account for the payment of principal, interest, and related costs for all general long-term debt other than debt issued for and serviced by proprietary funds.

Special Revenue Funds

These funds are used to account for the proceeds of specific revenue sources, other than major capital projects, that are legally restricted for specific purposes. The County budgets the following special revenue funds: **Durham Fire and Rescue Service Tax District Fund, Lebanon Fire District Fund, Redwood Fire District Fund, New Hope Fire District Fund, Eno Fire Fund, Bahama Fire District Fund, Special Park District Fund, and Community Health Fund.**

The **Community Health Fund** accounts for the financial resources acquired through the leasing of Durham Regional Hospital to Duke University, accounts for the earnings of these financial resources, and ensures the financial resources are used for health-related operating and capital expenditures. Due to recent rule changes from the Government Accounting and Standards Board (GASB) the Community Health Fund is now categorized as a Durham County Special Revenue Fund, and no longer within the Trust Fund group of funds. This changed effective July 1, 2016.

Enterprise Funds

The **Sewer Utility Fund** is used to account for the revenues and expenses related to the provision of sewer service as well as the debt service for the fund (largely in Research Triangle Park).

The **Stormwater Utility Fund** is used to account for the revenues and expenses related to the provision of stormwater service as well as the debt service for the fund.

SUPPLEMENTAL SECTIONS

The **Summary** section provides a summary of sources of revenue and expenditures from the General Fund. A detailed overview of revenue sources is included. This section also provides a brief account and graphs of all funds budgeted for the fiscal year beginning July 1, 2020. In addition, the section contains a summary of FTEs for all funds.

The **Appendix** contains supplemental information that includes the FY 2020-21 Budget Calendar, the **Glossary Terms**, which contains information to help the reader understand the terminology used in the budget document, the budget and amendment process, a statement of revenues, expenditures, and changes in fund balance, Durham County fiscal policies, and a detailed chart of non-profits funded through the Durham County Non-Profit Funding Program.

Capital projects, funded primarily by general obligation bonds, are presented in a separate document, the **Durham County Capital Improvement Plan**. This document is a 10-year plan that is updated biannually.

ADDITIONAL INFORMATION

In accordance with North Carolina General Statutes, the **basis of accounting and budgeting** for the County is **modified accrual**. This means that **revenues** are recorded in the period in which they are **measurable and available**. Revenues are recognized when they are received in cash (e.g. licenses, fines, etc.) or when the collection of the amount is estimated to be received in the near future (e.g. property taxes). **Expenditures** in a modified accrual basis are generally recognized in the period when goods and services are received, or liabilities are incurred.

Departmental **performance measure** data is updated through the end of the second quarter of FY 2019-20 if measures are fiscal-year-to-date and through the end of FY 2018-19 if measures are fiscal year.



- A Resident Satisfaction Survey icon next to a measure means that measure and data come from the annual City/County Resident Satisfaction Survey.



- A Strategic Plan icon next to a measure means that measure comes from the 2017-2021 Durham County Strategic Plan.

Data for the Strategic Plan Community Indicators from the 2017-2021 Durham County Strategic Plan is provided in the front of this document.

This document was prepared by the Durham County Budget and Management Services Department and is available online at www.dconc.gov. If further information is needed, contact Budget and Management Services at 200 East Main Street, 4th Floor, Durham, North Carolina 27701, by phone at (919) 560-0017, or by email at budget@dconc.gov.

**DURHAM COUNTY
FY 2020-21 APPROVED BUDGET**

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GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished
Budget Presentation
Award*

PRESENTED TO

Durham County

North Carolina

For the Fiscal Year Beginning

July 1, 2019

Christopher P. Morill

Executive Director



COUNTY OF DURHAM

WENDELL M. DAVIS
COUNTY MANAGER

July 1, 2020

The Honorable Members
Durham County Board of County Commissioners
Durham County Administrative Complex
200 East Main Street
Durham, NC 27701

Dear Durham County Residents,

I am honored to present the Durham Board of County Commissioners approved comprehensive spending plan for Durham County Government for fiscal year 2020-21. The document is in accordance with the North Carolina Local Government Budget and Fiscal Control Act and fulfills my obligation to present a balanced fiscal plan by June 1, 2020. The FY 2020-21 Board approved budget, guided by Board priorities, provides funding for the continuation of vitally important County services supported by data-driven decisions, while also recognizing a trend of diminishing resources.

The framework for developing and approving this fiscal year's budget shifted significantly between the Board of County Commissioners budget retreat in February, the recommended budget development process, and Board

For more detailed information on the
Approved Budget and MFR data:
www.data-dconc.org

budget discussion. This change is resultant from the impact of the novel coronavirus (COVID-19). Governments, organizations, and individuals across the globe have reacted quickly to abrupt changes in the health standards required to protect people's lives and health. The measures needed to maintain such standards have resulted in extraordinary, unpredictable economic fluctuations and increased pressures on local government human services and public safety functions to help protect citizen health, wellness, and safety. Preparing a budget in such a climate presented many challenges. While unprecedented, the economic landscape required strategic approaches to ensure adequate resources are available to address critical life and safety issues while funding statutory mandates and requirements by county governments. The approved budget was developed to shield the organization against many unknowns in the foreseeable future.

PRE COVID-19

Pre COVID-19, the February budget outlook started with a potential \$12 - \$15 million "natural" increase in available revenues to address budget priorities. With over \$40 million in new budget requests for critical needs, the projected natural revenue growth would have made a difference in key Board priorities. Although there were insufficient funds to address all of the individual

needs submitted, there was some financial capacity to address some of the community's pressing issues. BOCC members identified areas of interest during the budget retreat for the FY 2020-21 budget development. The list included potential funding to address DSS Medicaid compliance, public safety budget shortfalls, building maintenance, library operations, and the information technology infrastructure. Further, the Board supported the Durham Public Schools operating and capital budgets and a desire for continued investments in Pre-K initiatives. Guidance also occurred to reevaluate base budget funding to create additional capacity for priorities.

POST COVID-19

Post impact of COVID-19, in late April, the forecast for projected new dollars in FY 2020-21 had decreased to \$216,468, a loss of nearly \$12- \$15 million in new funds. This quickly changing economic landscape resulting from the impact of COVID-19 caused a revenue challenge and placed pressures on the expenditure budget. The health issues associated with COVID-19 increased service demands for the Public Health Department, Department of Social Services, Emergency Management, EMS, and Sheriff's Department operations. Further, funding was needed to purchase personal protective equipment, support temporary housing for the unsheltered at Urban Ministries, and address increased cleaning standards outlined by the Center for Disease Control. With this outlook and fiscal crisis brewing, a shift occurred with the overall budget development to limit budget expansion and develop cost control strategies to manage operations.

In April, the County implemented strategies to help shield the organization against potential revenue unknowns by freezing positions, controlling budget spending levels for the current year, and limiting expansion for FY 2020-21. We will not get any significant sales tax trending information until January of 2021, and during that same period, we will have a better sense of property tax collection levels. Over the next six months, we will manage the organization through increased spending controls, while also preparing for the potential worst-case scenario if revenues and COVID-19 related expenditures are worse than expected. At the beginning of the next fiscal year, 120 frozen positions will be temporarily transferred into a reserve to offset potential budget shortfalls. This amount translates to \$4.3 million.

Several approaches were engaged to ensure the highest priorities were met with the budget development to include the realignment of existing funds, freezing vacant positions, limiting fund balance use to the FY 2019-20 level, and making permanent budget reductions to county operations. Further, the FY 2020-21 budget does not have a tax increase recommendation. To achieve a balanced budget, an operational reduction of \$3.1 million occurred. This reduction, coupled with \$2 million in cuts last year, continues to prove the organization's ability to respond to new realities. These budget funds Board and community priorities to include additional support for Durham Public Schools operating and capital budget, resources to support the new library facility, investments to address technology improvements, and additional dollars to address DSS Medicaid compliance issues. This budget also recognizes our most valued asset, Durham County government's human capital by shielding permanent employees from layoffs during a period of many fiscal unknowns. In FY 2020-21, continued planning will occur to ensure the county is prepared for best and worse-case scenarios with budget operations.

This budget funds the continuation of Board and community priorities. Yet, there are limited dollars to address priority new initiatives or expand existing efforts. The approved budget totals \$675,607,696, which translates to a 2.64% increase for all funds. Of this amount, the General Fund budget increase totals \$467,034,886, a 2.24% increase.

The following section highlights budget priorities achieved to address one-time and recurring expenses:

- | | |
|--|---------------|
| 1. Additional funding support for Durham Public Schools: | \$5.2 million |
| 2. Planning for Unknown COVID-19 Budget Expenses: | \$3.5 million |
| 3. Employee health insurance cost increases: | \$2.7 million |
| 4. DSS Medicaid Compliance issues: | \$0.9 million |
| 5. Technology infrastructure | \$1.8 million |
| 6. Small Business COVID-19 support | \$1.0 million |

The charts below reflect summary budget information for the total budget and General fund operations.

All Funds Summary	FY 2018-19 Actuals	FY 2019-20 Original	FY 2020-21 Requested	FY 2020-21 Approved	\$ Change Appr. v. Orig.	% Change Appr. v. Orig.
General Funds	\$537,258,449	\$571,768,756	\$613,864,523	\$583,185,830	\$11,417,074	2.00%
Special Revenue Funds	\$14,434,243	\$12,566,084	\$11,407,754	\$11,379,983	(\$1,186,101)	-9.44%
Debt Service Funds	\$151,707,662	\$63,974,554	\$71,632,435	\$68,135,847	\$4,161,293	6.50%
Enterprise Funds	\$12,269,154	\$9,911,600	\$11,492,100	\$12,906,036	\$2,994,436	30.21%
Trust Funds	\$493,911					
Total	\$716,163,419	\$658,220,994	\$708,396,812	\$675,607,696	\$17,386,702	2.64%

General Funds Expenditure Summary	FY 2018-19 Actuals	FY 2019-20 Original	FY 2020-21 Requested	FY 2020-21 Approved	\$ Change Appr. v. Orig.	% Change Appr. v. Orig.
General Government	\$109,218,698	\$124,755,964	\$126,201,177	\$122,695,304	(\$2,060,660)	-1.65%
Public Safety	\$60,989,927	\$65,703,543	\$69,674,643	\$64,575,944	(\$1,127,599)	-1.72%
Transportation	\$244,338	\$412,500	\$412,500	\$412,500	\$0	0.00%
Environmental Protection	\$4,536,698	\$5,035,563	\$6,913,013	\$4,588,506	(\$447,057)	-8.88%
Econom. & Physical Devlp.	\$4,307,908	\$6,616,072	\$7,617,941	\$6,964,832	\$348,760	5.27%
Human Services	\$77,287,870	\$81,859,393	\$91,089,454	\$87,669,716	\$5,810,323	7.10%
Education	\$149,371,483	\$159,419,265	\$180,475,869	\$166,565,598	\$7,146,333	4.48%
Cultural & Recreational	\$13,124,123	\$12,985,559	\$15,019,646	\$13,562,486	\$576,927	4.44%
Total	\$419,081,045	\$456,787,859	\$497,404,243	\$467,034,886	\$10,247,027	2.24%

Budget Outlook

Property Taxes

Economic uncertainty affects the County's largest revenue source, property tax, by slowing estimated property valuation growth, particularly vehicle valuation, and the estimated property tax collection rate. Natural growth on property value

Durham County Property Valuation

Property Category	FY2019-20 Original	FY2020-21 Projected	% Change FY to FY
Real Property	\$36,679,717,847	\$37,237,748,596	1.52%
Personal Value/Service	\$3,568,011,796	\$3,802,807,778	6.58%
Public Service	\$580,268,564	\$607,015,073	4.61%
Motor Vehicle	\$2,392,736,986	\$2,392,736,986	0.00%
Total	\$43,220,735,193	\$44,040,308,433	1.90%

year to year is 1.90% higher (\$819.5 million) from FY 2019-20 to FY 2020-21. Natural property tax

valuation growth is estimated to bring in an additional \$4.2 million for General Fund and Capital Finance Fund without a property tax rate increase.

This budget maintains the current property tax at the current rate. The County is taking a relatively conservative approach to property valuation and decreasing the property tax collection rate by 0.5% to 99.1%. For the last several years, the tax collection rate has been at 99.6%. But we assume that the collection rate will be lower as citizens continue to experience economic and potential financial hardship until there is sufficient testing and tracing of the virus and, ultimately, the development of a vaccine.

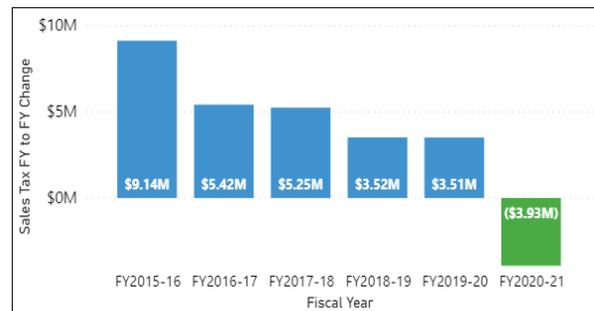
Fund Name	FY 2019-20 Approved	FY 2020-21 Approved	FY 2020-21 Projected Revenue
General Fund	62.61	62.61	\$273,254,743.76
Capital Finance Plan Fund	8.61	8.61	\$37,577,437.21
Total	71.22	71.22	\$310,832,180.97

That assessment is also part of the reason this budget does not include a property tax rate increase for the General Fund. Given this approach, the County still expects to see \$4.2 million in new property tax revenue in the upcoming fiscal year compared to the current year. However, that growth is significantly lower than in recent years and limits the County’s ability to support additional expansion needs.

Sales Taxes

The total amount of budgeted sales tax revenue for next the fiscal year is \$83.4 million. For perspective, this amount translates to 19.4 cents of property tax revenue. Sales tax revenue is the second- largest revenue source for Durham County government and is entirely related to economic activity. The estimated current-year collections are expected to come in below budget due to the current economic slowdown. But that decrease is softened somewhat by better than expected collections for the first seven months of the current fiscal year. The base FY 2019-20 sales tax budget was lower than historic trends due to higher than normal sales tax refunds in FY 2018-19.

Historical & Projected Sales Tax
Year over Year Change



FY 2020-21 sales tax estimates will be difficult to project, given the current fiscal volatility resultant from COVID-19’s impact on communities. With such high variability, the County has chosen to take a conservative path with an estimated 4.5% decrease in total sales tax collection. This equates to a loss of \$3.9 million or nearly equivalent to one cent of property tax. But to understand the loss the County may experience, it is worth noting that just three months ago, the FY 2020-21 sales tax estimate was expected to grow by \$6.4 million rather than drop by \$3.9 million. That is a swing of over \$10 million. The projected ten million dollars could have funded many critical strategic areas.

Summary Sales Tax Budget

Key Revenues	FY2018-19 Actuals	FY2019-20 Original	FY 2020-21 Requested	FY 2020-21 Approved	\$ Change Appr. v. Orig.	% Change Appr. v. Orig.
Article 39 (1 Cent)	\$23,430,000	\$25,460,000	\$27,046,914	\$25,061,015	(\$398,985)	-1.57%
Article 42 (1/2 Cent)	\$16,907,182	\$17,585,000	\$17,512,941	\$17,328,568	(\$256,432)	-1.46%
Article 46 (1/4 Cent)	\$14,795,987	\$15,100,000	\$15,300,000	\$15,200,000	\$100,000	0.66%
Article 40 (1/2 Cent)	\$14,520,150	\$14,744,000	\$14,186,468	\$14,028,246	(\$715,754)	-4.85%
City Sales Tax ILA	\$14,867,204	\$14,482,000	\$10,257,879	\$11,821,383	(\$2,660,617)	-18.37%
Article 44 (1/2 Cent)	\$1,345					
Total	\$84,521,869	\$87,371,000	\$84,304,202	\$83,439,212	(\$3,931,788)	-4.50%

Other Revenues

With many other existing County revenue sources tied to specific programs or remaining flat, the County had to find additional revenue from other nontraditional sources. Occupancy tax will see a significant decline due to public health social distancing concerns. Interest rates have improved investment income revenue for the current year, but lower rates are holding down next year's projections.

Key Revenues	FY2018-19 Actuals	FY2019-20 Original	FY 2020-21 Recommended	Commissioner Approved	% Change Appr. v. Orig.
ABC Net Profit Distribution	\$2,300,000	\$2,400,000	\$2,400,000	\$2,400,000	0.00%
Deed Registratration and Transfer Fees	\$5,124,433	\$5,400,000	\$5,400,000	\$5,400,000	0.00%
EMS Patient Fees	\$8,452,030	\$9,020,000	\$9,030,000	\$9,030,000	0.11%
Investment Revenue	\$3,328,627	\$2,000,000	\$2,000,000	\$2,000,000	0.00%
Local Occupancy Tax (General Fund)	\$3,810,529	\$3,950,000	\$2,823,264	\$2,823,264	-28.52%
Local Occupancy Tax (NCMLS)	\$500,000	\$500,000	\$500,000	\$500,000	0.00%
Solid Waste Management Fee Co	\$2,243,611	\$2,176,490	\$2,194,109	\$2,371,725	8.97%
Total	\$25,759,230	\$25,446,490	\$24,347,373	\$24,524,989	-3.62%

For this budget, the County transferred available funds from the Capital Financing Plan equivalent to one cent of property tax revenue or \$4.3 million. After careful review of existing and new capital projects, the Board approved realigning County funding (PAYGO funds) from several projects and transferring those funds to the General Fund. These projects will be suspended for future review and consideration. Over \$10 million is being made available for General Fund use in the approved budget. It is important to note that a portion of these funds are available only for FY 2020-21, and therefore, will support only one-time costs incurred during the year. Such spending restrictions support the continued sound fiscal standing of the County. EMS Fees and other revenues are estimated to remain flat.

Expenditure Highlights

Goal 1: Community Empowerment and Enrichment

Durham Public Schools

The Board of County Commissioners' commitment to quality public education remains a high priority. This budget reflects that priority with Durham Public Schools remaining the largest expenditure for Durham County Government at \$153.2 million, or 33% of the entire General Fund budget. The FY 2020-21 Board of Education requested an \$18.88 million increase to address K12

funding issues. Of the total request, \$14.2 million would support a projected growth of 761 students to enroll at DPS and charter schools. In addition, the dollars would fund salary increases for certified and classified employees, teacher salary supplements, and resources to address the exceptional children’s compliance needs. Further dollars were requested to raise the minimum wage for classified employees to \$15 per hour. The remaining \$4.2 million was requested to support the capital outlay budget for repairs and renovations.

Due to limited new funds resulting from the impact of COVID-19, the approved budget includes a \$5.2 million increase to address \$5.2 million in current expense costs and \$2 million for DPS capital projects budget. This amount represents a 4.9% increase to the Durham Public Schools budget. These funds were derived through budget realignments within the county government, fund transfers, and the decision not to support other expansion request priorities. Of the new funds made available, over 70% were used to support the Durham Public Schools budget request. The per-pupil funding increases with the current year funding level. In FY 2019-20, the per-pupil funding totaled \$3,647 per student. The FY 2020-21 per-pupil funding totals \$3,708, a \$61 increase.

Durham Public School Local Per Pupil Funding

Category	FY 2019-20	FY 2020-21	Difference
Current Expense Funding	\$144,600,717	\$149,807,778	\$5,207,061
Annual Pre-K support (Article 46 Sales Tax)	(\$508,140)	(\$508,140)	\$ 0
Net Current Expense funding	\$144,092,577	\$149,299,638	\$5,207,061
DPS and Charter School pupil estimate	39,507	40,268	761
Local Per Pupil funding	\$3,647	\$3,708	\$ 61

In addition to Durham Public Schools operating budget recommendation, this budget supports the debt service commitment needed to address the Capital Improvement Plan (CIP) jointly endorsed by the Board of County Commissioners and Board of Education during the Joint BOE-BOCC meeting in February 2020. The Board will adopt the Capital Improvement Plan (CIP) in June during FY 2020-21. More specifically, the debt service budget and capacity are available to support limited obligation bond projects included in the capital improvement plan for Durham Public Schools for FY 2020-21.

Nonprofit Process

In FY 2017-18, the Nonprofit Funding Program incorporated MFR-related process improvements as part of an ongoing program review. The program review compared our process to that of our North Carolina peers and included policy direction from the Board of County Commissioners, with the most significant process improvements made to the application process's solicitation and application review components. The solicitation process included tighter alignment to targeted needs identified within Strategic Plan Goals 1 through 4. In FY 2019-20, nonprofits received continuation funding after a recertification process.

Currently funded nonprofits are allocated in the budget through December 31, 2020. In September 2020, a Request for Proposal (RFP) will occur to solicit proposals that address strategic priorities that align with targeted needs identified by the County from January 1, 2021, to December 31, 2021. This approach aligns with the Managing for Results strategy and resultant

from an operational assessment of the overall nonprofit application process. A detailed listing of funding recommendations can be found in the appendix.

Goal 2: Health and Well Being for All

Reserve for Durham County Government COVID-19 Expenses

On March 14, 2020, Durham County Board of Commissioners declared a State of Emergency in Durham County. The declaration was made following the President of the United States' declaration of a national emergency and Governor Roy Cooper's Executive Order, and the North Carolina State of Emergency Management issued in response to the pandemic state of Coronavirus (COVID-19). Since that period, Durham County staff have worked in concert with the City of Durham, Durham Public Schools, and other community partners to address health and safety needs during this unprecedented global health pandemic. The national and state declarations will ultimately allow jurisdictions to seek reimbursement through filings with FEMA for certain expenses incurred to address prevention and preparedness response to COVID-19.

In April, the Board approved a budget amendment to support unforeseen costs associated with COVID-19. The amendment included \$3.8 million to support temporary housing for homeless individuals and families currently served by Urban Ministries, additional funds for Personal Protective Equipment (PPE) for employees, and increased funds to address expanded security and janitorial services. Further, the dollars funded critical services for DSS, including Aging and Adult Services, Foster Care Services, Family Economic Independence (FEI), Child Protective Services, and Foster Care.

Although the COVID-19 resulted in unexpected expenses in the current fiscal year, \$4.6 million is budgeted to address potential county-related COVID-19 expenditures in FY 2020-21. While we are hopeful the pandemic will soon end, one-time strategic realignments are in place to address the county government's potential costs.

Department of Social Services

In 2017, the North Carolina General Assembly passed and implemented the Medicaid Report Card. This report card was a way to monitor county Social Service agencies to ensure counties were meeting the timeliness standards for processing all Medicaid applications. This step was taken because counties failed to meet the standards at the required federal level of 90% timeliness. Official measurements for counties began in July 2017. Any county not meeting the required standard for passing 7 of 12 months within the fiscal year or failing three consecutive months must submit a corrective action plan to remedy the issues and come back into compliance with the report card.

Durham County has consistently met the report card standards since the implementation of the program in July of 2017. However, in 2019, the agency started to have failures within the Adult Medicaid section due to high staff turnover. The Department took proactive measures to address concerns attributed to the turnover issues, including reallocating resources to the area, examining contracting with other counties, and developing an internal corrective action plan to address the challenges of timely application production. Unfortunately, the Department continued to struggle and failed three months in a row (October through December) and was informed by the state in January of 2020 that the agency must go into corrective action. The

Department passed the January 2020 report card. However, additional investments must happen to improve compliance levels.

Funds are being added to the Social Services budget to support up to 39 new FTEs in support of a Medicaid corrective action plan presented to the Board in February. The state Department of Health and Human Services is now using a report card system to monitor county compliance each month and determine those counties that need a corrective action plan or other assistance and support. Corrective action plans will be required for any county that fails to meet standards for three consecutive months or five months out of twelve consecutive months. The County's program will support its goals of meeting and maintaining 90% AND ABOVE on the Medicaid state report card for six successive months continuing to pass after that, and processing 95% of Medicaid recertifications on-time. The total cost to support this effort is \$2.6 million, of which \$934,298 is from County dollars.

Library

Durham County Libraries will be eliminating overdue fines for books and audiovisuals. "Fine Free" removes barriers to library access for low income families and individuals. Residents will still be charged a fee for lost and damaged items.

Goal 3: Safe Community

Sheriff's Office

In FY 2018-19, the Board of County Commissioners approved 13 new detention positions to implement a mental health pod for female detainees similar to the male mental health pod opened in FY16-17. The female mental health pod's implementation was delayed due to life safety capital projects underway in the Detention Center.

Since October 2019, the County's Criminal Justice Resource Center (CJRC) has been providing life skill activities for all females in the Detention Center and specialized mental health services. CRJC will continue to provide this level of service to female detainees next fiscal year. To meet other critical staffing, the Board approved the reclassification of 4 of the existing 12 detention positions once needed for the female mental health pod. Eight positions were reduced from the Sheriff budget to support funding needs in other General Fund areas.

The approved budget also includes funding for the regular replacement of 17 Sheriff vehicles, totaling \$770,000.

Office of Emergency Services

The approved budget includes funding for the Office of Emergency Services for an Emergency Operations Center facility assessment. The assessment will evaluate the current and future needs of the Emergency Operations Center and inform future planning for county and city emergency operations. The assessment cost, \$50,000, will be split with the City of Durham.

Criminal Justice Resource Center

This budget provides funding for consultant services to assist in conducting an updated Gang Assessment, which will provide essential data surrounding gang prevention, intervention, and suppression efforts in Durham. The evaluation will serve as a guide for the community's gang

reduction efforts. The City of Durham will share half of the \$100,000 assessment cost. CJRC expects to receive increased state funding for expanded JCPC programming to serve an increase in eligible individuals due to the passage of Raise the Age legislation.

Goal 4: Environmental Stewardship & Community Prosperity

Environmental, Development, and Economic Programs

This fiscal year the County will continue focusing on strategic environmental and infrastructure investments aligned with our Strategic Plan and community goals. This work will include our ongoing Resiliency & Redundancy improvements to our utility systems and treatment plant in the Research Triangle Park. This work enhances our utility systems' capabilities to best support our reinvestment in Park Center and provides the foundational elements for strengthening economic growth in RTP.

Trending and future economic assumptions have allowed the County to lower estimated payments for companies scheduled to receive payments through their contractual agreements in the upcoming fiscal year. The FY 2020-21 budget includes \$1.1 million for IEP payments. If additional funds are needed as companies meet contract goals, the County will use available funding or General Fund balance to support those costs.

Environmental Programs

The recommendation to move Stormwater and Erosion Control to a dedicated Enterprise Fund was approved as part of the FY 2020-21 budget. Two new positions were approved to begin working towards compliance with this federal mandate. The estimated cost is \$1.4 million to support this effort, with an equal amount of revenue, offsetting these costs, coming from dedicated fees.

Goal 5: Accountable, Efficient and Visionary Government

Durham County Employees

The County has more than 2,000 employees providing high-level service to our residents, from EMS staff saving lives to school nurses keeping DPS students healthy, to Criminal Justice Resource Center staff working with citizens to avoid the debilitating cost of jail (where possible), to Detention Center staff protecting citizens and inmates alike 24 hours a day, seven days a week. With more than 21% of Durham County's active employee base eligible to retire within the next five years, the continued focus must occur on retaining and recruiting a talented workforce to ensure we meet residents' service demands. It has been an arduous budget season, and the inability to fund merit-based performance increases was a difficult decision to make, yet we needed to evaluate all options to help mitigate against furloughs. With that said, this budget will support increases in employee health insurance of \$2.7 million, an increase of approximately 9%, while also supporting other employee benefits. While the upcoming year may put stress on our government and our services, I am confident that our employees will respond just as they have done in the past.

Information Services and Technology (IS&T)

The need to maintain and improve the efficiency and security of Durham County data and services is increasing at an accelerating rate. To meet this increasing demand, the IS&T budget supports \$1.03 million in increases in software licensing and maintenance for FY 2020-21. Microsoft Office365 Application and Service agreement increases a total of \$844,905. Also, \$191,000 is allocated to address increased security controls. The Board also authorized realignments of existing positions to support four Cyber Security positions.

The allocation allows Durham County business departments to retain and maximize useful Microsoft Office. Further, it supports critical cloud services, including email, scheduling, collaboration tools, and the benefit of cloud-based services supporting business continuity and disaster recovery. The additional investment will bolster security operations.

Capital Improvement Plan Update

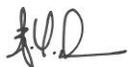
The Board adopted the 2020-2029 10-year Capital Improvement Plan (CIP) in June 2020. This budget includes project changes since that period, which were reviewed by the Board of County Commissioners in February 2020. This budget supports the Capital Improvement Plan projects endorsed by the Board of Commissioners and the Board of Education during a Joint meeting held February 4, 2020. The Board formally approved these changes during budget adoption in June. The approved CIP is used as a guiding document for expected capital projects for the next several years.

Conclusion

Twenty years into the 21st century, we all began the year 2020 as always, with much hope and optimism. Few could have imagined our community confronted with a Malware Cyber-attack that crippled City and County Government operations - let alone a global pandemic. Today, through patience, diligence, hard work, and considerable perseverance, we have turned the corner on restoring our technology. I remain hopeful that as we continue our battle with COVID-19, the annals of history will tell a similar story of Durham's resilience.

Our public servants are at the forefront of this battle, and I'm proud to stand shoulder to shoulder with each of them and other community partners to see us through. The FY 2020-21 Board of County Commissioners approved budget is positioned to help guide the County and its citizens through these tumultuous times.

Sincerely,



Wendell M. Davis



Tax Rate for FY 2020-21:

No Increase

over FY 2019-20 tax rate

71.22¢

per \$100 valuation



Property tax collection percentage decreased in response to economic conditions from 99.60% to 99.10%



Sales Taxes revenue are projected to decrease 4.50% from the current year approved budget

Total # of Durham County Employees (Full-Time Equivalents) 2,130.14  37.60 net increase (39 partially grant funded)
(8 positions eliminated)
(5 funded by other revenue)

State mandated increase in County contribution to the Local Government Employees Retirement System (LGERS) from 9.00% to 10.20%  and 9.70% to 10.90% for Local Law Enforcement Officers (LEO)

Freezing hiring for most vacant positions for a projected cost savings of \$4.3 million  Pay for Performance salary increase for employees in FY 2020-21 reduced to 0% due to economic constraints and to prevent layoffs

DCo is continuing contract with Cigna as the administrator of our Health Insurance process  \$2.7 million increase in Benefits Plan Expenses

Ongoing current expense funding to Durham Public Schools increases **\$7.21 million** or **4.9%**  to **\$153,177,778**

 Local Expense per Pupil Funding increases to **\$3,708**, up **\$61** from FY 2019-20

 The General Fund balance appropriation increased minimally from **\$17.40 million** to **\$17.37 million**

\$3.5 million is being reserved for DCo's ongoing COVID response
*Additional \$1 million for Durham Small Business Recovery Fund

 **\$4.3 million** is reserved for continual uncertainties related to the economic downturn

 **26** Replacement Vehicles for Durham Co Departments **\$1.04 million** 

40 existing nonprofit agencies are being funded from July-December in the nonprofit funding program in FY 2020-21 at a total of **\$352,000** 

- 5 Target Areas** 
- Goal 1 Target Area**
Increase Family Success and Prosperity **\$183,750**
 - Goal 2 Target Area**
Increase the Number of Healthy Years Lived **\$99,750**
 - Goal 2 Target Area (added FY2018-19)**
Provide Access to Sufficient and Health Food **\$45,000**
 - Goal 3 Target Area**
Improve Life Outcomes for Those involved in the Criminal Justice System **\$18,500**
 - Goal 4 Target Area**
Protect Natural Resources **\$5,000**

A new nonprofits program is projected to begin in January of 2021 with \$352,000 to fund this new RFP

Debt Service increase **\$4.16 million** to **\$68.14 million** with dedicated property tax staying at **8.61¢** 

Durham County Strategic Plan



Goal 1: COMMUNITY EMPOWERMENT AND ENRICHMENT

Goal Statement: Provide access to educational, vocational, economic and cultural opportunities while empowering citizens to choose pathways for their own success.

Goal Objectives

- Education** - Provide and support learning and enrichment opportunities that support educational achievement and life success
- Workforce Development** – Strengthen the workforce by supporting the provision of effective education, training and workforce supports, particularly for hard-to-employ groups
- Family Success** – Support and provide programs, services and systems which improve life skills and increase family success and prosperity
- Cultural Opportunities** – Foster a strong, diverse, artistic and cultural environment



Goal 2: HEALTH AND WELL-BEING FOR ALL

Goal Statement: Improve the quality of life across the lifespan through protecting the health of community, reducing barriers to access services and ensuring a network of integrated health and human services available to people in need.

Goal Objectives

- Healthy Lives** – Increase the number of healthy years that residents live
- Healthy Community** – Increase the quality of life in Durham County
- Healthy Children and Youth** – Support the optimal growth and development of children & youth



Goal 3: SAFE COMMUNITY

Goal Statement: Partner with stakeholders to prevent and address unsafe conditions, protect life and property, respond to emergencies and ensure accessible and fair justice.

Goal Objectives

- Emergency Response Services** – Increase safety and security throughout the community by responding to emergency crisis situations
- Criminal Justice Services** – Improve life outcomes for people involved in the criminal justice system
- Prevention Services** – Reduce the number of people entering and involved with the criminal justice system
- Emergency Management Services** – Enhance Durham's ability to decrease harmful impacts of emergency events on people and property
- Community Services** – Increase residents' ability to help themselves and others be safe and



Goal 4: ENVIRONMENTAL STEWARDSHIP & COMMUNITY PROSPERITY

Goal Statement: Protect natural resources and support and promote community and economic vitality for all residents of Durham County.

Goal Objectives

- Natural Resource Stewardship and Protection** – Protect and steward natural resources through comprehensive compliance and educational programs
- Community Prosperity** – Promote and support the community and economic vitality for all residents of Durham County
- Development and Community Services** – Provide responsive and efficient services to promote community prosperity, smart growth and quality development for all residents of Durham County



Goal 5: ACCOUNTABLE, EFFICIENT, AND VISIONARY GOVERNMENT

Goal Statement: An effective organization committed to continuous innovation, exceptional customer service, transparency and fiscal responsibility.

Goal Objectives

- Customer Engagement and Responsiveness** – Bolster engagement and responsiveness to both internal and external customers
- Talented Workforce** – Attract, recruit and retain talented workforce
- Sound Business Systems** – Ensure sound fiscal, operational and technology systems
- Performance Management and Accountability** – Improve the strategic use of data to promote ongoing process improvement, innovation and accountability

Introduction

During Fiscal Year 2016-2017, Durham County citizens, commissioners, and staff embarked on a “refresh” of the Durham County Strategic Plan. The update involved a deliberate process of outreach and engagement with key County stakeholders to ensure varied perspectives and interests were represented.

In seeking community input for the Strategic Plan, a series of meetings were held to solicit input from diverse stakeholder groups across all County demographics (i.e. Senior Citizens, Hispanic Advocacy Organizations, etc.) Innovative methods of using technology were also used to solicit community input for the plan such as connecting to citizens through social media and online community forums. Finally, County leaders also received input from about 550 County employees as part of the update process.

As the plan was being refreshed, the County was also coordinating alignment of the Strategic Plan with Durham County’s change management model, Managing for Results (MFR), implemented across all County Departments in 2014. Aligning the MFR model with the Strategic Plan improves County effectiveness at achieving Strategic Plan goals and directs the development of County departmental work plans for current and future years.

Once community outreach and engagement processes ended, the process resulted in a refreshed Durham County Strategic Plan which was finalized and published in 2017. The full Durham County Strategic Plan can be found here: <http://www.dconc.gov/home/showdocument?id=21678>

The refreshed plan established the following five community wide Strategic Plan Goals:

-  Goal 1: Community Empowerment and Enrichment
-  Goal 2: Health and Well-Being for All
-  Goal 3: Safe Community
-  Goal 4: Environmental Stewardship and Community Prosperity
-  Goal 5: Accountable, Efficient, and Visionary Government

Within each of the five goal areas, the refreshed Strategic Plan included a series of global metrics that would serve as a means with which to gauge overall County progress toward achieving Strategic Plan Goals. The metrics (measures) include 17 “Community” Indicators, which are broad and high-level gauges of the community which can be used to inform the creation of community wide policy and overarching progress toward the five Strategic Plan goals.

Initial data collection and analysis of the 17 Strategic Plan Community Indicators has been compiled with basic trend analysis and preliminary benchmarking of the indicators included on subsequent pages. Additional measures related to Strategic Plan objectives and implemented strategies are defined in the Strategic Plan document noted above and will be reported on at least bi-annually in a separate, more detailed document for citizen, Commissioner, and County staff assessment and programmatic review. This in-depth review process will continually direct organizational focus towards strategies and services that support Strategic Plan goals. Ultimately that organizational focus and service provision will inform budget allocations which is where the Strategic Plan connects to the annual budget document. As the Strategic Plan implementation process evolves more specific related measures will be included in the annual budget document to support specific dollar allocations.

Reporting tools and mechanisms to monitor all aspects of the Strategic Plan that, in turn, will assist internal and external County Stakeholders in achieving Strategic Plan Goals are currently being developed. These tools will also allow citizens to view and assess Strategic Plan progress always using appropriate metric dashboards. Finally, the Budget and Management Services department has increased its capacity to assist other County departments with deepening their integration of departmental workplans and the Managing for Results process with the Strategic Plan Goals (and objectives and strategies).

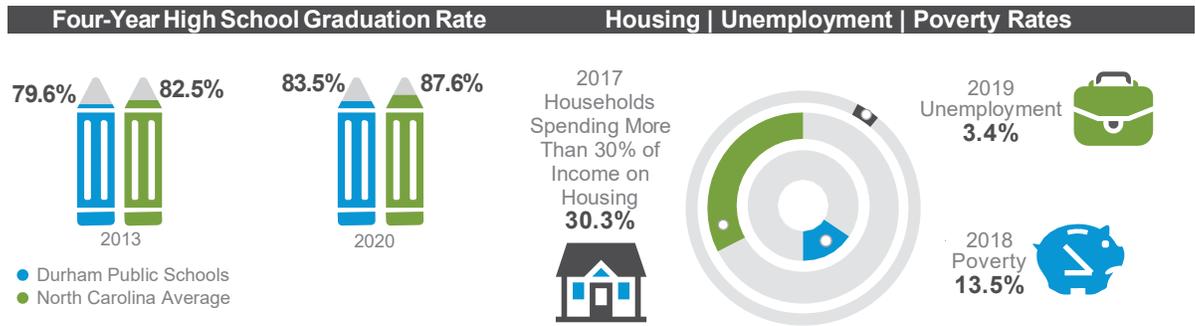
Community Indicators

Strategic Plan



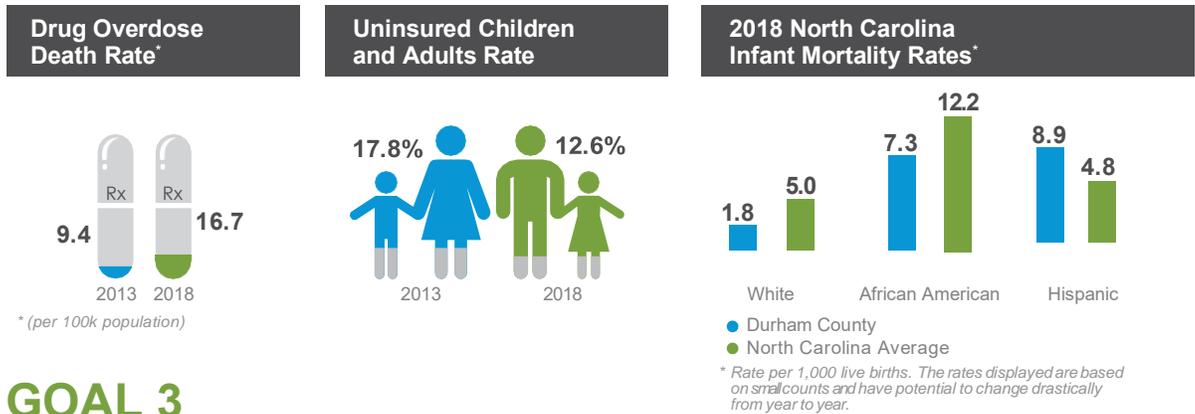
GOAL 1

Community Empowerment and Enrichment



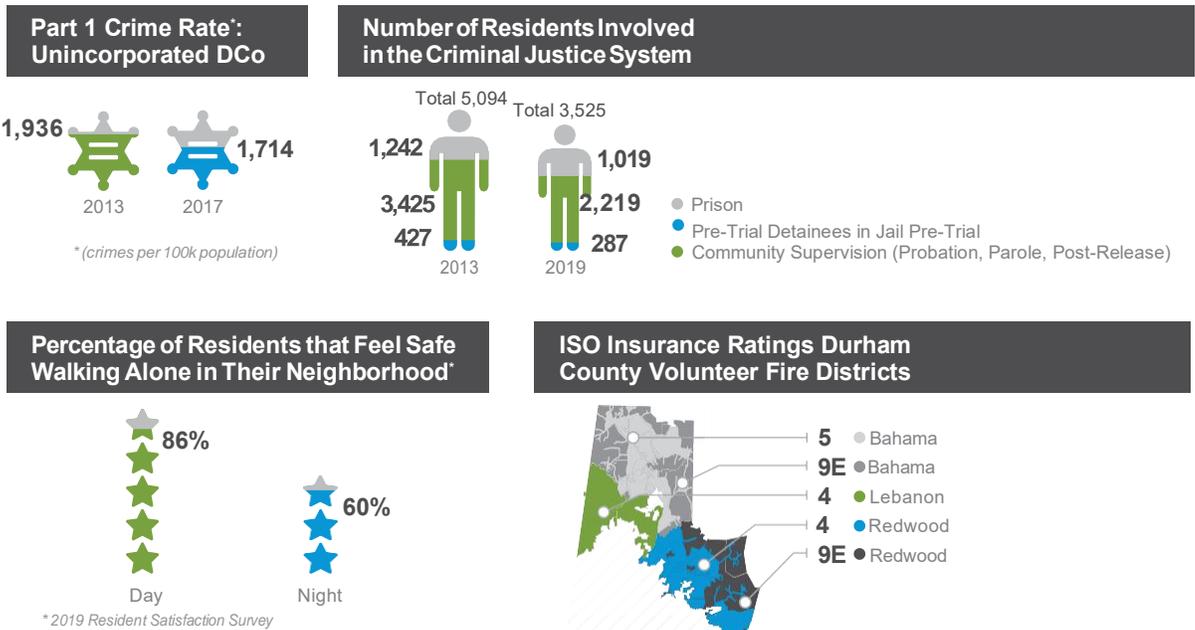
GOAL 2

Health and Well-Being for All



GOAL 3

Safe Community



Community Indicators

Strategic Plan



GOAL 4

Environmental Stewardship and Community Prosperity

Percentage of Residents Who Said the Community is a Good Place to Live*



Durham County National Benchmark
* 2019 Resident Satisfaction Survey

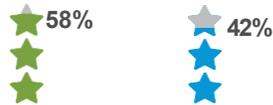
Percent Employment



GOAL 5

Accountable, Efficient, and Visionary Government

Percentage of Residents Who Were Satisfied with the Quality of Services Provided by the County*



Durham County National Benchmark
* 2019 Resident Satisfaction Survey

Percentage of Residents Who Said the Value Received for Local Taxes and Fees is Good or Excellent*



Durham County National Benchmark
* 2019 Resident Satisfaction Survey

Bond Rating



Maintain Durham County Triple A Bond Rating



For more detailed information, including benchmark comparisons, where applicable, visit www.data-dconc.org.

SOURCES

- DPS High School/4-year Graduation Rate: www.ncpublicschools.org
- Percentage of households spending more than 30% of income on housing: *Housing and Urban Development*
- Percentage of Unemployment: US Bureau of Labor Statistics
- Percentage of Families in Poverty: US Census Small Area Income and Poverty Estimates
- Drug Overdose Death Rate: <https://wonder.cdc.gov>
- Percentage of uninsured Adults and Children: US Census Small Area Health Insurance Estimates
- Infant Mortality rates by race/ethnicity: North Carolina State Center for Health Statistics
- Part 1 Crime Rate for unincorporated Durham County (violent and property crime): NC State Bureau of Investigation
- Number of residents involved in the criminal justice system: NC Department of Public Safety
- Percentage of Residents that reported that they feel very safe or safe (day/night in neighborhood), according to the Resident Satisfaction Survey: 2019 Resident Satisfaction Survey
- ISO Insurance Ratings for each fire department: Durham County Fire Marshal
- Percentage of residents who rated the community as good or excellent as a place to live, according to the Resident satisfaction Survey: 2019 Resident Satisfaction Survey
- Employment Growth: NC Office of State Budget and Management
- Percentage of Residents who were very satisfied or satisfied with the overall quality of services provided by the County: 2019 Resident Satisfaction Survey
- Percentage of Residents who rated the value received for local taxes and fees as good or excellent: 2019 Resident Satisfaction Survey
- Maintain Durham County Triple A Bond Rating: Moody's Investors Service, Inc. and Standard & Poor's (S&P) Global Ratings