

Proposed 2010 Budget

Introduction at Westfield City Council Meeting

August 10, 2009

City of
Westfield

Indiana 1834

Old Town Charm, New City Style

Old Town Charm, New City Style

Presentation Outline

- Vision
- 2010 Budget Timeline
- Perspective/Comparisons
- Budget Highlights
- 2009 Budget and 2010 Budget
- Questions and Answers

Vision of the Council and Mayor

- Library Staffing
- Increased Utility Costs
- Culvert Maintenance
- County Surveyor
- Increased Insurance Costs
- Library Space
- School Transportation Needs
- School Teacher Needs
- Fire Personnel Needs
- F&B Tax Issues
- Parks Staffing
- Fire Training Needs
- County Assessor
- School Space Needs
- County Auditor
- Street Repairs
- County Roads
- Sports Complex
- County Staffing
- Township Fire Protection
- Police Equipment Needs
- County Health
- County Bridges
- Police Patrolman Needs
- Police Training Needs
- Information Technology Needs
- Community Development Needs
- Parks Maintenance
- Bridge Replacements
- Stand Junction
- Township Poor Relief
- Reduced Homestead Credits
- Parks Improvements
- Legislation Changes
- Fire Equipment Needs
- Street Improvements
- Township Parks
- COIT Distribution Issues
- Delayed Tax Payments
- School Programming Needs
- School Funding Challenges
- County Sheriff
- 35% Homestead Supplemental Deduction
- County Courts
- Street Maintenance
- School Technology Needs
- Economic Development Considerations
- County Planning & Zoning
- Parks Equipment

2010 Budget Timeline

▶ May 19, 2009

- Department Head Pre-Budget Meeting
- Discussed Provision for Expenses and Salary Submissions

▶ June 16, 2009

- Deadline for Department Heads to Submit Detailed Expenses for all Line Items
- Solicited Salary Requests from Department Heads

▶ June 30, 2009

- Deadline for Department Heads to Submit Salary Requests

▶ July 8, 2009

- Preliminary Budget Meeting with City Council Budget Committee (Councilors: Dippel, Kingshill, and T. Smith)

▶ July 14, 2009

- Second Budget Meeting with City Council Budget Committee

▶ July 29, 2009

- City Council Budget Committee meets with each Department Head

▶ July 30 – August 5, 2009

- Mayor and Deputy Mayor meet with each Council Member

2009 Budget Timeline

continued

▶ August 10, 2009

- Budget Introduction (City Council Meeting)

▶ August 24, 2009

- Budget Public Hearing (City Council Meeting)

▶ September 14, 2009

- Budget Adoption Consideration (City Council Meeting)

Budget Process Review

- Accountability
 - Operating Letters
 - Performance Metrics
 - Performance Evaluations
- Cost Cutting Measures
 - Innovation (technology)
 - Savings (quotes and bids)
 - Avoidance (warranty or coupon)
- Integrity
- Zero Based Budgeting

PRIVATE AND CONFIDENTIAL

City of Westfield

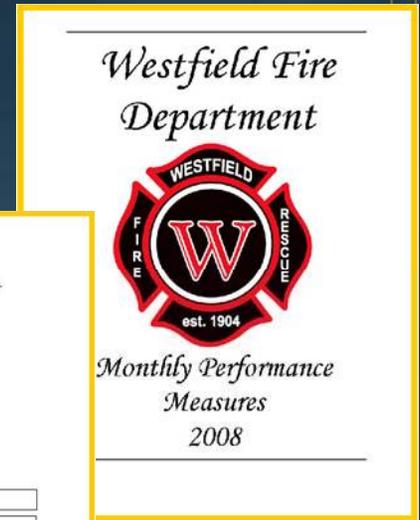

ADMINISTRATION
City of Westfield, Indiana

Annual Performance & Development Review

Associate Name: Position Title:

Department: Division:

Performance Period: From: To: Date assigned to current position:



Local governments announce purchasing agreements

Provided by Lacey Everett
 Posted: September 25, 2008



Mayor Greg Ballard today joined Westfield Mayor Andy Cook and other local leaders throughout the area to announce the formation of the Central Indiana Purchasing Alliance (CIPA), a collaboration of local governments throughout Central Indiana that will share purchasing agreements for certain commodities in an effort to leverage greater purchasing power, streamline government, and reign in local spending.

2008 Cost Savings Report All Departments

Department	Savings	Innovation	Cost Avoidance	Grants	2008 Annual Savings
Administration	\$ 1,248	\$ -	\$ 17,693		\$ 18,941
Community Development	\$ 2,769	\$ 5,160	\$ -		\$ 7,929
Economic Development	\$ -	\$ -	\$ 355		\$ 355
Fire	\$ 9,249	\$ 17,192	\$ 28,601		\$ 55,042
IT	\$ 2,400	\$ 7,360	\$ 2		\$ 9,762
Parks	\$ 11,557	\$ -	\$ 11,350	\$ 1,725,000	\$ 1,747,907
Police	\$ 12,047	\$ 6,300	\$ 31,844	\$ 4,900	\$ 55,091
Public Works	\$ 154,426	\$ 3,709	\$ 32,067		\$ 188,587
Total	\$ 193,696	\$ 39,721	\$ 121,913		\$ 2,083,614

\$700,438 Cost Savings in 2008 excluding Grants

Department	2008 Annual Savings	Savings	Innovation	Cost Avoidance	Grants
Administration	267,507	244,425	-	23,082	-
Mayor	117	74	-	44	-
Community Development	7,929	2,769	5,160	-	-
Economic Development	355	-	-	355	-
Fire	466,938	11,815	17,192	28,932	409,000
IT	9,762	2,400	7,360	2	-
Parks	1,839,856	11,557	-	11,350	1,816,949
Police	56,833	13,079	6,300	32,554	4,900
Public Works	281,990	220,163	30,983	30,844	-
Total	2,931,287	506,281	66,995	127,163	2,230,849

Savings: Paper Procurement with Westfield-Washington Schools (over \$2k); No increase in Health Insurance (over \$200k)

Innovation: Electronic Meeting Packets instead of Paper Packets (over \$5k)

Cost Avoidance: Returned unused equipment; cancelled outdated service contracts

\$405,264 Cost Savings in 2009_{to date} excluding Grants

Department	2008 Annual Savings	Savings	Innovation	Cost Avoidance	Grants
Administration	227,129	5,188	220,588	1,353	-
Economic Development	25,601	-	-	25,601	-
Fire	8,910	8,635	150	125	-
IT	121,045	10,063	-	110,591	-
Parks	47,186	12,882	13,484	7,400	-
Police	2,974	689	-	2,241	-
Public Works	147,420	75,469	-	1,064	175,000
Total	580,264	112,927	234,222	148,347	175,000

Savings: Renegotiated Health/Dental Costs (over \$5k); volunteers for the Parks Department

Innovation: Fixed Distributive Tax (over \$9k)

Cost Avoidance: Land Donations (over \$8k)

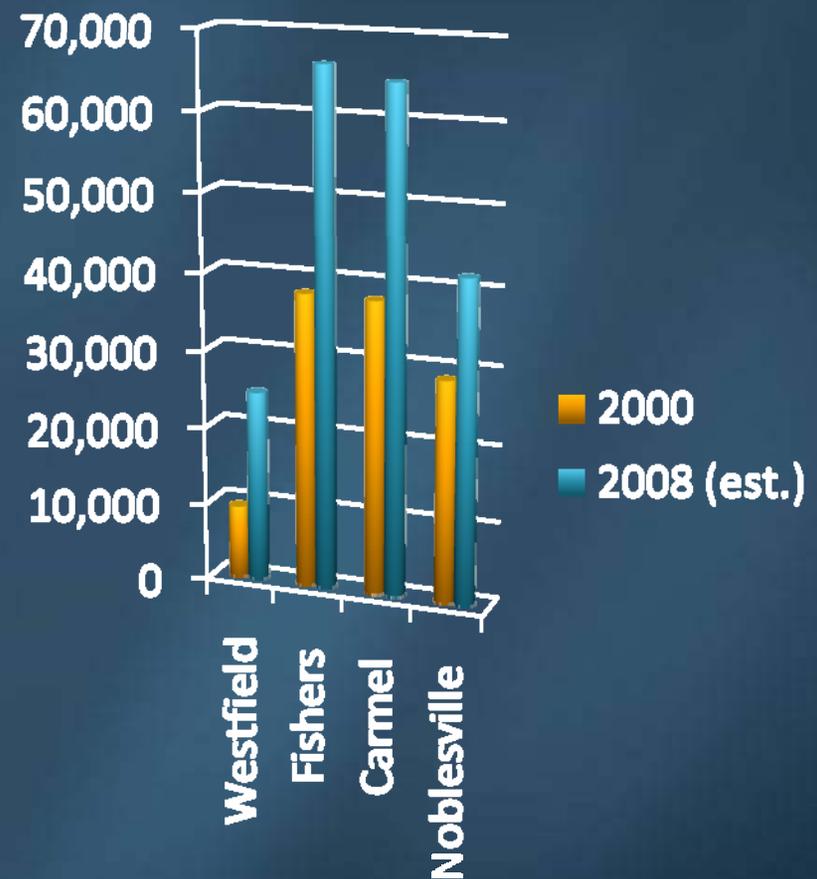
Perspective/Comparisons

- Population Data
- Assessed Valuation Growth
- Assessed Valuation Loss Due to HB 1001
- Property Tax Breakdowns
- Per Capita Spending Comparisons
- Budget Comparisons
- Public Safety Statistics
- Efficiencies
- Best Small Towns

Population Data

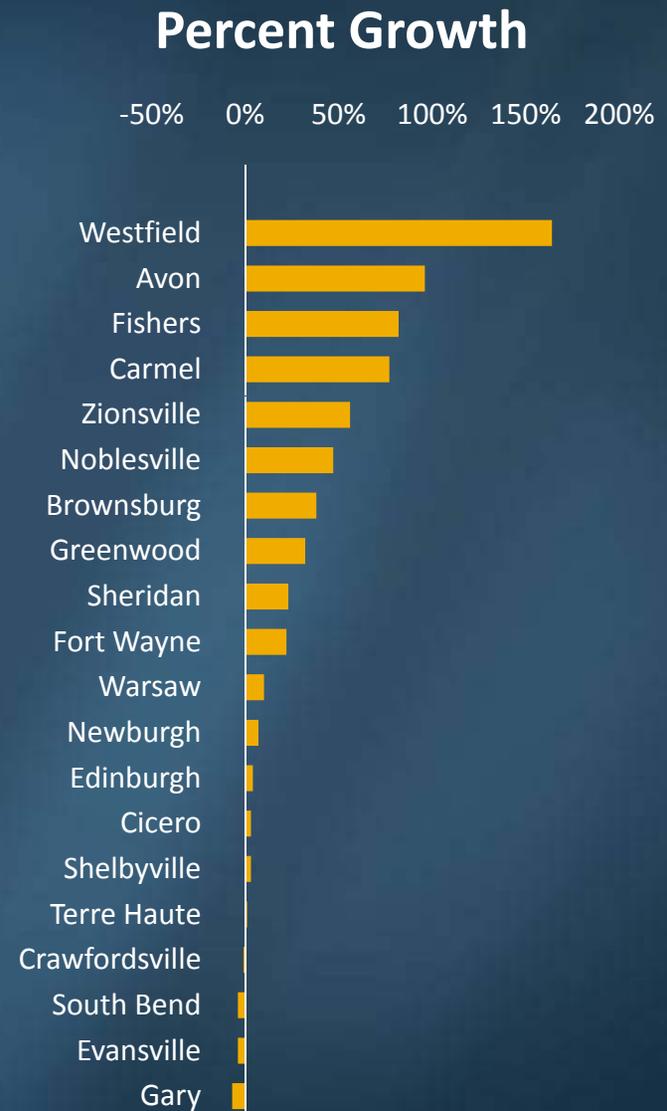
City/Town	2000	2008 (est.)	Increase
Westfield	9,293	24,500	164%
Fishers	37,835	69,011	82%
Carmel	37,733	66,769	77%
Noblesville	28,590	42,155	47%

Population Increases 2000-2008



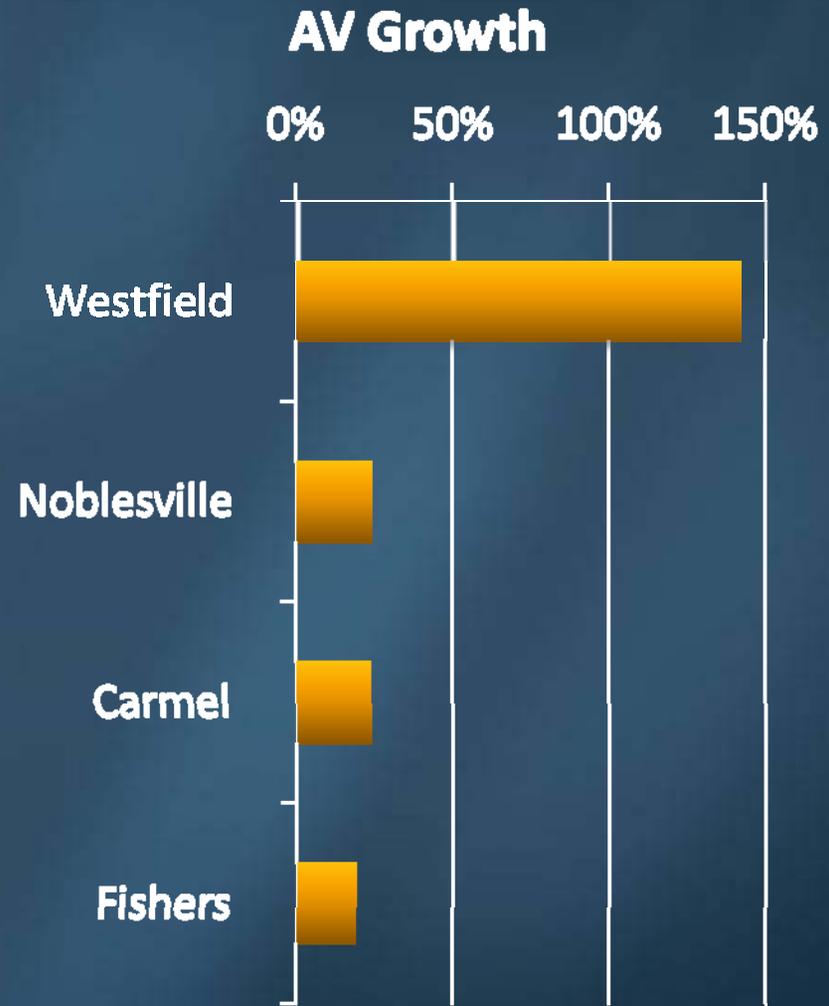
Population Change 2000-2008

City/Town	2000 Census Population	2008 Estimated Population	Percent Change
Westfield	9,293	24,500	164%
Avon	6,248	12,238	96%
Fishers	37,835	69,011	82%
Carmel	37,733	66,769	77%
Zionsville	8,775	13,655	56%
Noblesville	28,590	42,155	47%
Brownsburg	14,520	19,994	38%
Greenwood	36,037	47,720	32%
Sheridan	2,520	3,103	23%
Fort Wayne	205,727	251,591	22%
Warsaw	12,415	13,627	10%
Newburgh	3,088	3,312	7%
Edinburgh	4,505	4,677	4%
Cicero	4,303	4,451	3%
Shelbyville	17,951	18,516	3%
Terre Haute	59,614	60,007	1%
Crawfordsville	15,243	15,043	-1%
South Bend	107,789	103,807	-4%
Evansville	121,582	116,309	-4%
Gary	102,746	95,920	-7%



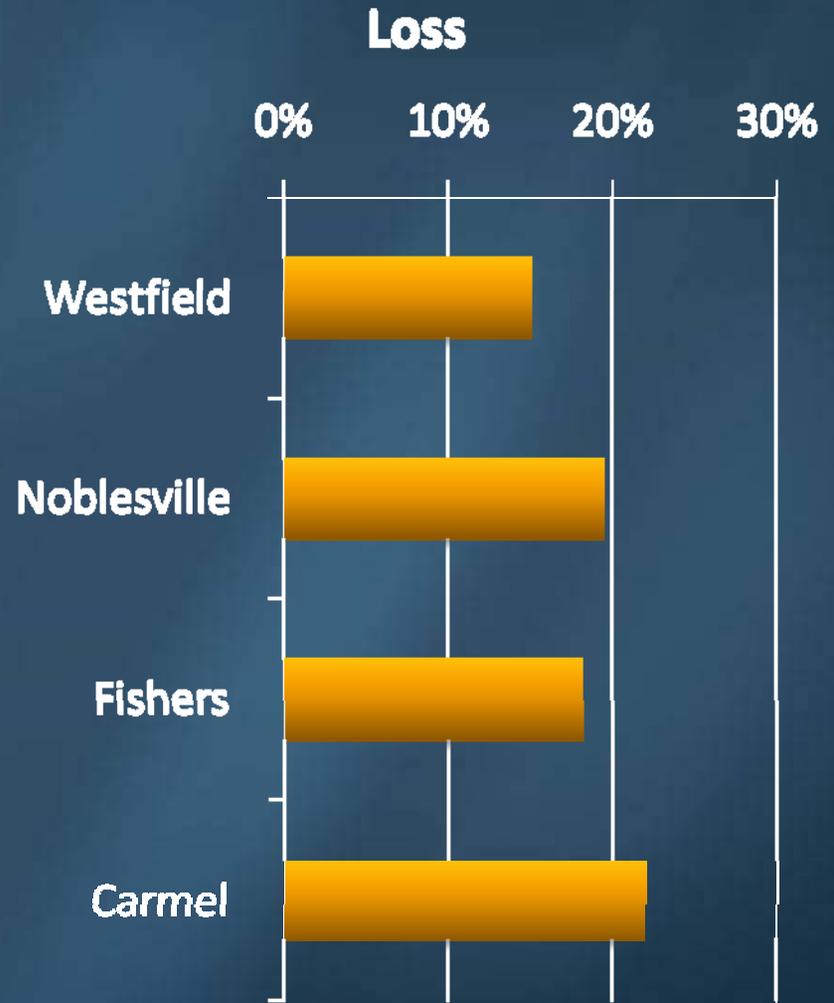
Assessed Valuation Growth

City/Town	2004 NAV (\$M)	2009 NAV (\$M)	Increase
Westfield	721	1,746	142.14%
Noblesville	1,735	2,151	24.02%
Fishers	3,593	4,272	18.88%
Carmel	4,384	5,416	23.53%



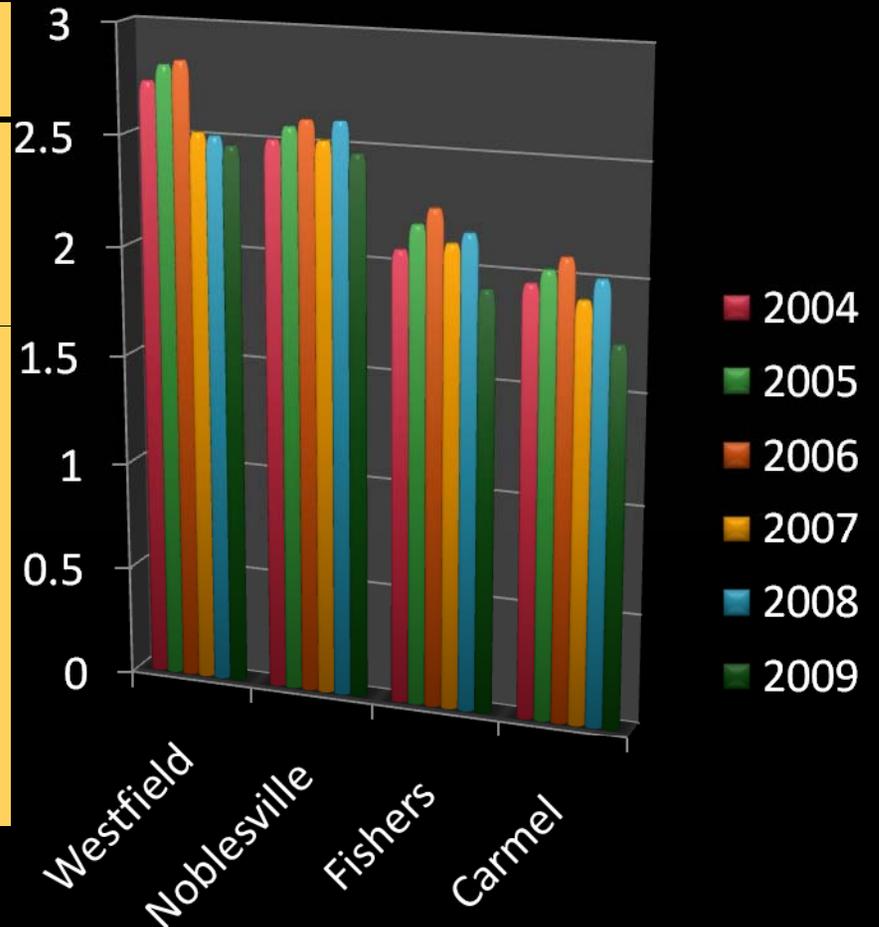
HB 1001 Assessed Valuation Loss

City/Town	2008 NAV (\$M)	2009 NAV (\$M)	Loss
Westfield	2,057	1,746	15.1%
Noblesville	2,673	2,151	19.5%
Fishers	5,222	4,272	18.2%
Carmel	6,937	5,411	22%



Total Tax Rate History

	Carmel	Fishers	Noblesville	Westfield
2004	1.97	2.07	2.51	2.74
2005	2.03	2.18	2.57	2.82
2006	2.09	2.26	2.61	2.84
2007	1.91	2.11	2.52	2.52
2008	2.01	2.16	2.62	2.51
2009	1.73	1.93	2.47	2.47

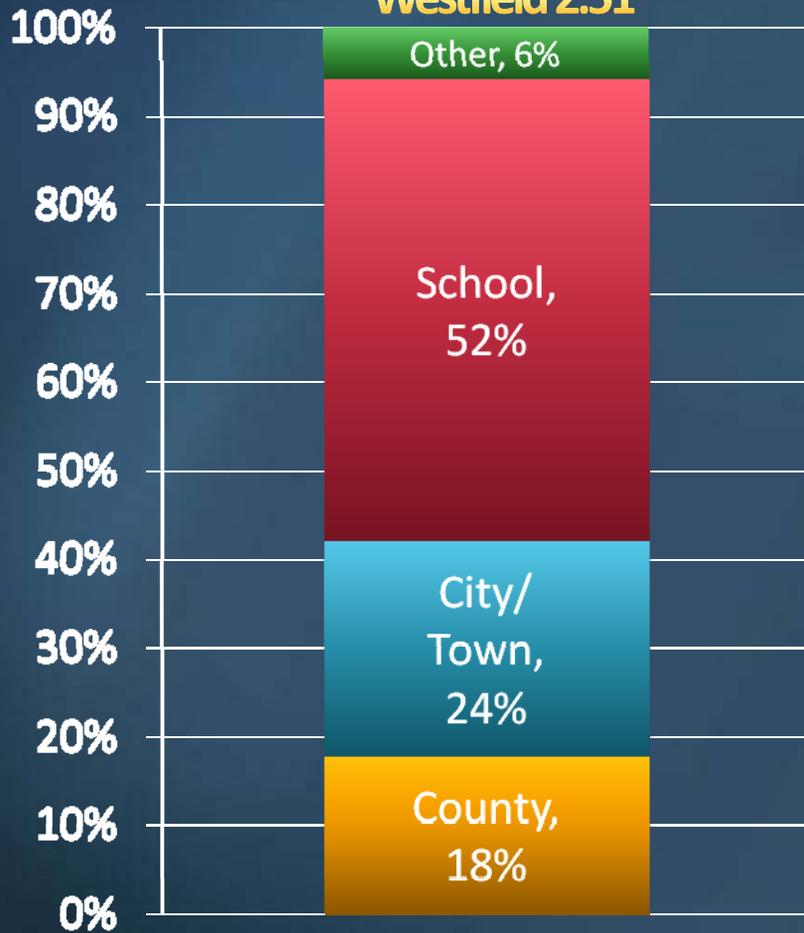


State Property Tax Breakdowns

Pay 2008

State Average 2.93

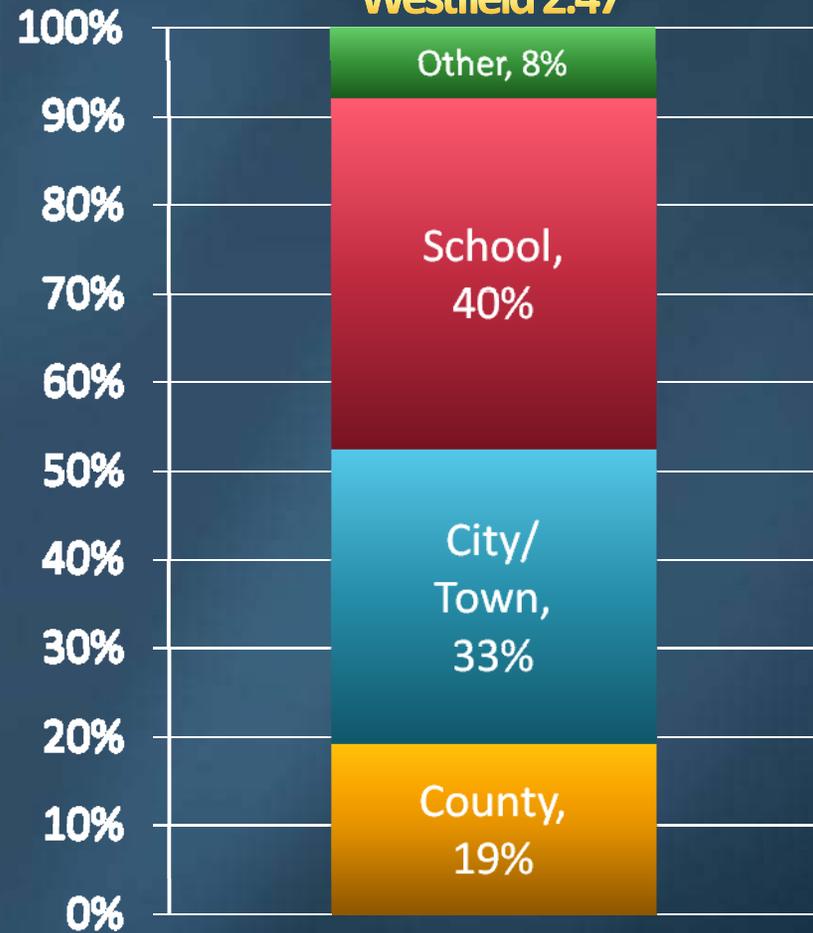
Westfield 2.51



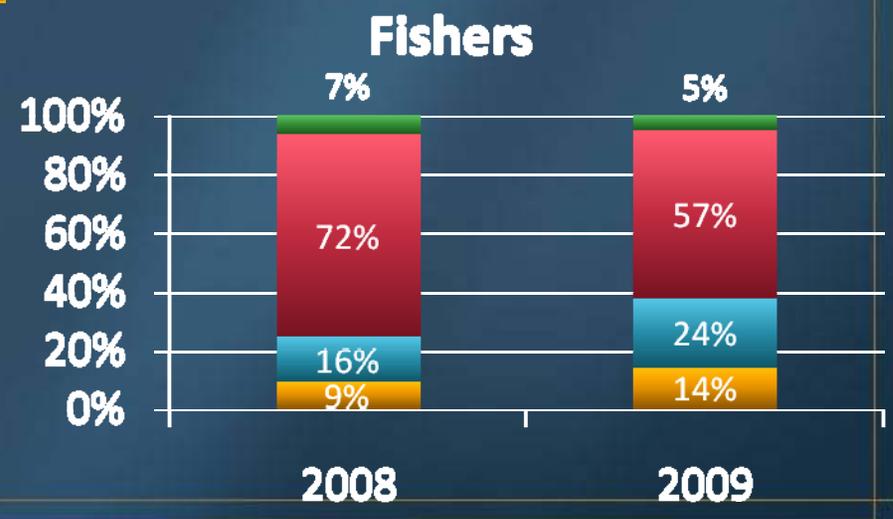
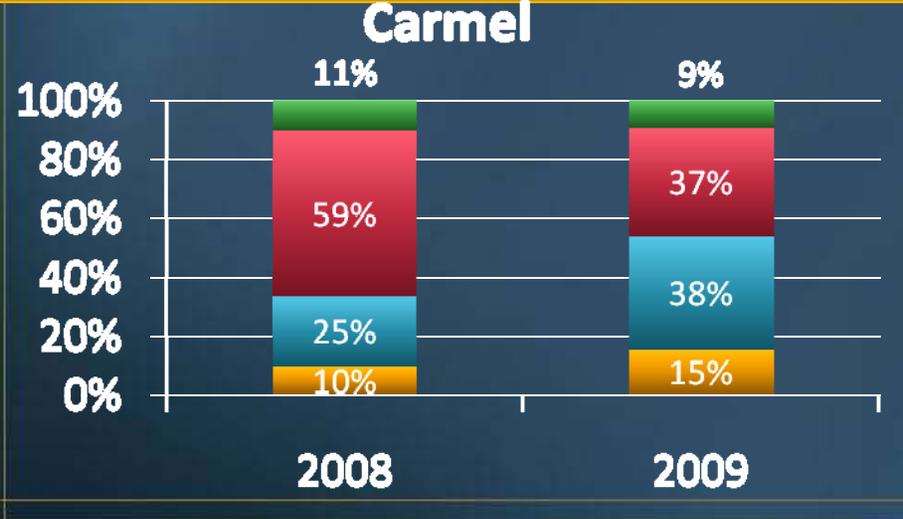
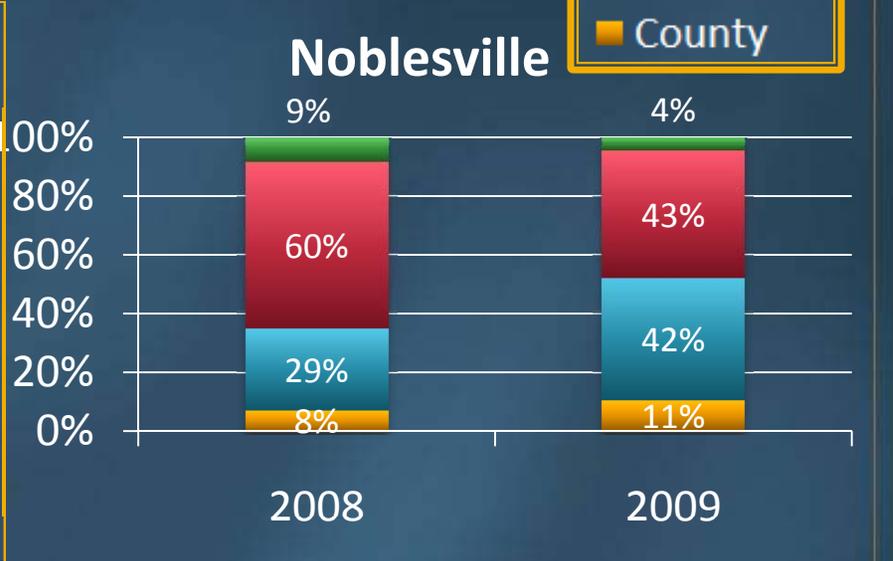
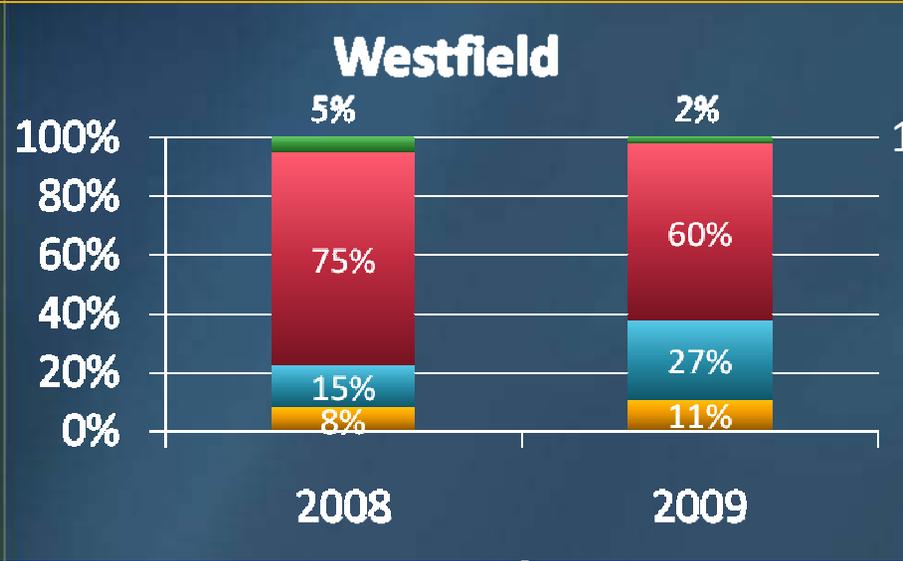
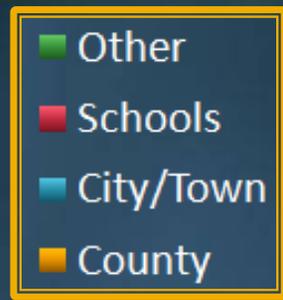
Pay 2009

State Average 2.46

Westfield 2.47



Hamilton County Property Tax Breakdowns Pay 2008 and Pay 2009

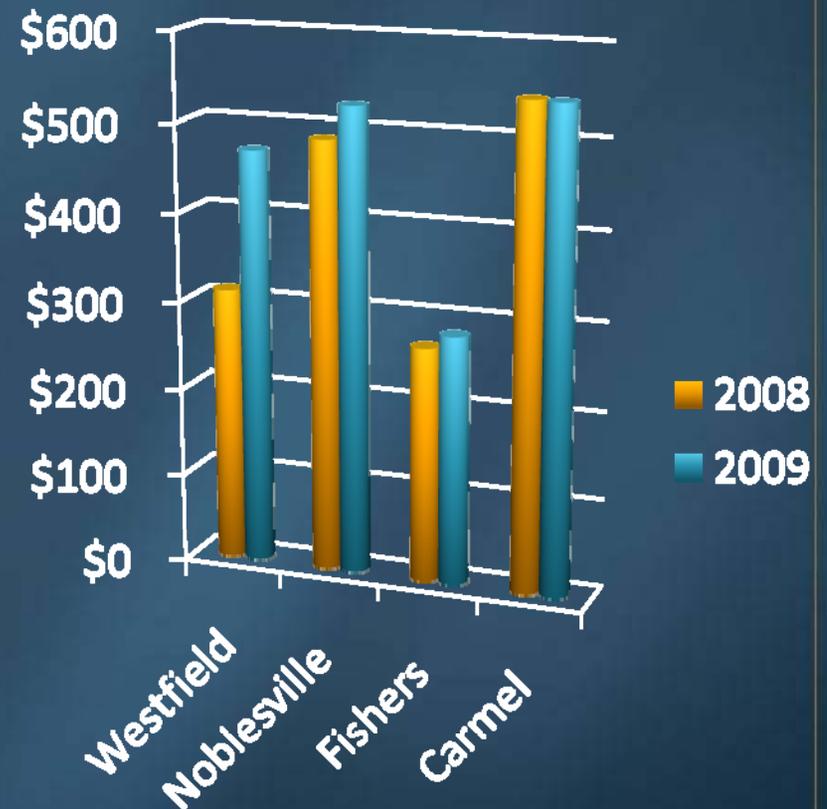


Source: DLGF 2008 and 2009

Property Taxes per Capita

	Westfield	Noblesville	Fishers	Carmel
City Tax Rate/100 NAV	.6606	1.0276	.4562	.6664
NAV (Billions)	2.057	2.673	5.222	6.937
Levy (Millions)	11.5	22.1	19.5	36.1
Population (2008 est.)	24,500	42,155	69,011	66,769
2009 \$/Capita	\$469	\$524	\$282	\$541
2008 \$/Capita	\$310	\$486	\$266	\$542

Property Taxes per Capita - 2009



Property Taxes per Capita 2009

City/Town	2009 Total Certified Levy	2008 est. Population	2009 Levy Per Capita
Newburgh	595,186	3,312	180
Edinburgh	842,954	4,677	180
Fishers	19,487,880	69,011	282
Cicero	1,313,186	4,451	295
Sheridan	980,395	3,103	316
Fort Wayne	99,532,973	251,591	396
Crawfordsville	6,514,365	15,043	433
Terre Haute	26,549,975	60,007	442
Evansville	53,900,854	116,309	463
Westfield	11,536,049	24,500	471
Noblesville	22,106,645	42,155	524
Carmel	36,092,579	66,769	541
Zionsville	7,712,052	13,655	565
Warsaw	8,635,637	13,627	634
Avon		12,238	-
Brownsburg		19,994	-
Gary		95,920	-
Greenwood		47,720	-
Shelbyville		18,516	-
South Bend		103,807	-

Property Taxes Per Capita



Property Taxes & COIT Dollars per Capita

	Westfield	Noblesville	Fishers	Carmel
COIT (Millions)	3.641	13.184	11.886	23.123
Levy (Millions)	11.5	22.1	19.5	36.1
Population (2008 est.)	24,500	42,155	69,011	66,769
2009 \$/Capita	\$618	\$837	\$455	\$887
2008 \$/Capita	\$424	\$772	\$428	\$851

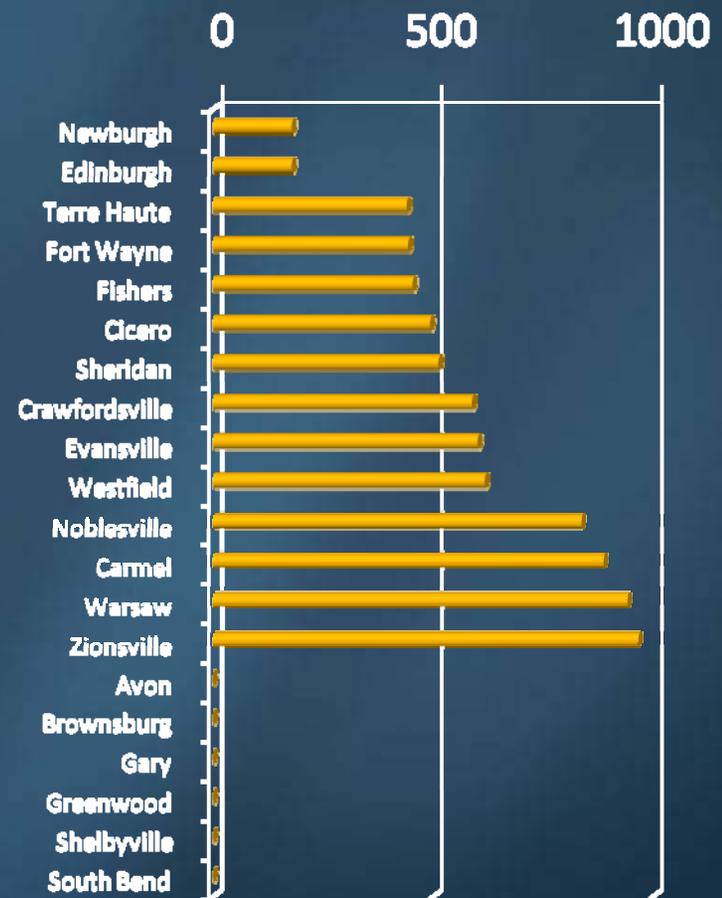
Property Taxes & COIT per Capita - 2009



Property Taxes and COIT per Capita 2009

City/Town	2009 Total Certified Levies	2009 COIT Shares	2009 Levy and COIT per Capita
Newburgh	595,186	*	180
Edinburgh	842,954		180
Terre Haute	26,549,975	*	442
Fort Wayne	99,532,973	12,421,557	445
Fishers	19,487,880	11,886,123	455
Cicero	1,313,186	890,573	495
Sheridan	980,395	613,964	514
Crawfordsville	6,514,365	2,358,668	590
Evansville	53,900,854	16,217,589	603
Westfield	11,536,049	3,641,672	619
Noblesville	22,106,645	13,183,558	837
Carmel	36,092,579	23,123,787	887
Warsaw	8,635,637	4,195,775	942
Zionsville	7,712,052	5,469,345	965
Avon		*	-
Brownsburg		*	-
Gary		*	-
Greenwood			-
Shelbyville		*	-
South Bend			-

Property Taxes and COIT per Capita



* No COIT

Total Budget per Capita

	Westfield	Noblesville	Fishers	Carmel
Certified Appropriations (2009)	16 M	55 M	45 M	81 M
Population (2008 est.)	24,500	42,155	69,011	66,769
2009 \$/Capita	\$655	\$1,314	\$655	\$1,211

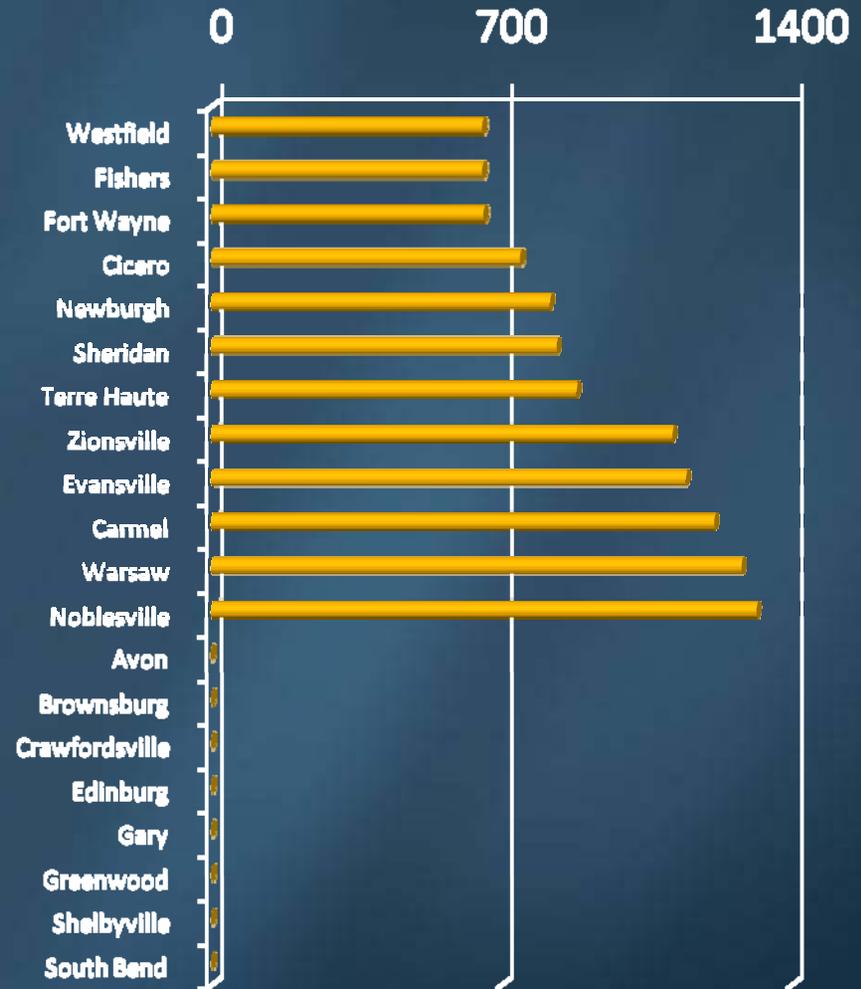
Total Budget per Capita



Total Budget per Capita 2009

City/Town	2009 Total Budget	2009 Total Budget per Capita
Westfield	16,057,977	655
Fishers	45,193,615	655
Fort Wayne	165,503,256	658
Cicero	3,320,320	746
Newburgh	2,700,058	815
Sheridan	2,581,349	832
Terre Haute	52,753,416	879
Zionsville	15,155,740	1,110
Evansville	132,893,701	1,143
Carmel	80,887,674	1,211
Warsaw	17,398,717	1,277
Noblesville	55,371,112	1,314
Avon	-	-
Brownsburg	-	-
Crawfordsville	-	-
Edinburg	-	-
Gary	-	-
Greenwood	-	-
Shelbyville	-	-
South Bend	-	-

Total Budget per Capita



Budget per Square Mile

Hamilton County 2009

City/Town	2009 Total Appropriations	Square Miles	Total Budget per Square Mile
Westfield	16,057,977	25.47	630,551
Sheridan	2,581,349	2.02	1,275,536
Fishers	45,193,615	31.32	1,442,808
Cicero	3,320,320	2.03	1,636,355
Noblesville	55,371,112	32.57	1,700,177
Carmel	80,887,674	40.18	2,013,171

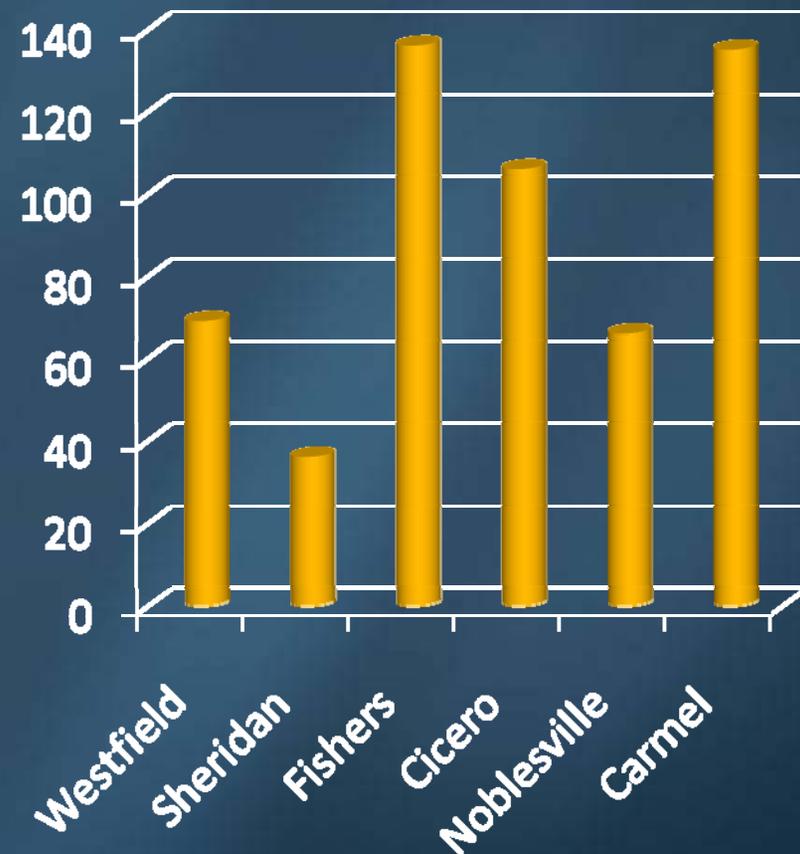
Total Budget per Square Mile



Net Assessed Value per Square Mile

City/Town	2009 Net Assessed Value (\$M)	Square Miles	Total NAV per Square Mile (\$M)
Westfield	1,746	25.47	69
Sheridan	72	2.02	36
Fishers	4,272	31.32	136
Cicero	216	2.03	106
Noblesville	2,151	32.57	66
Carmel	5,416	40.18	135

Net Assessed Value per Square Mile

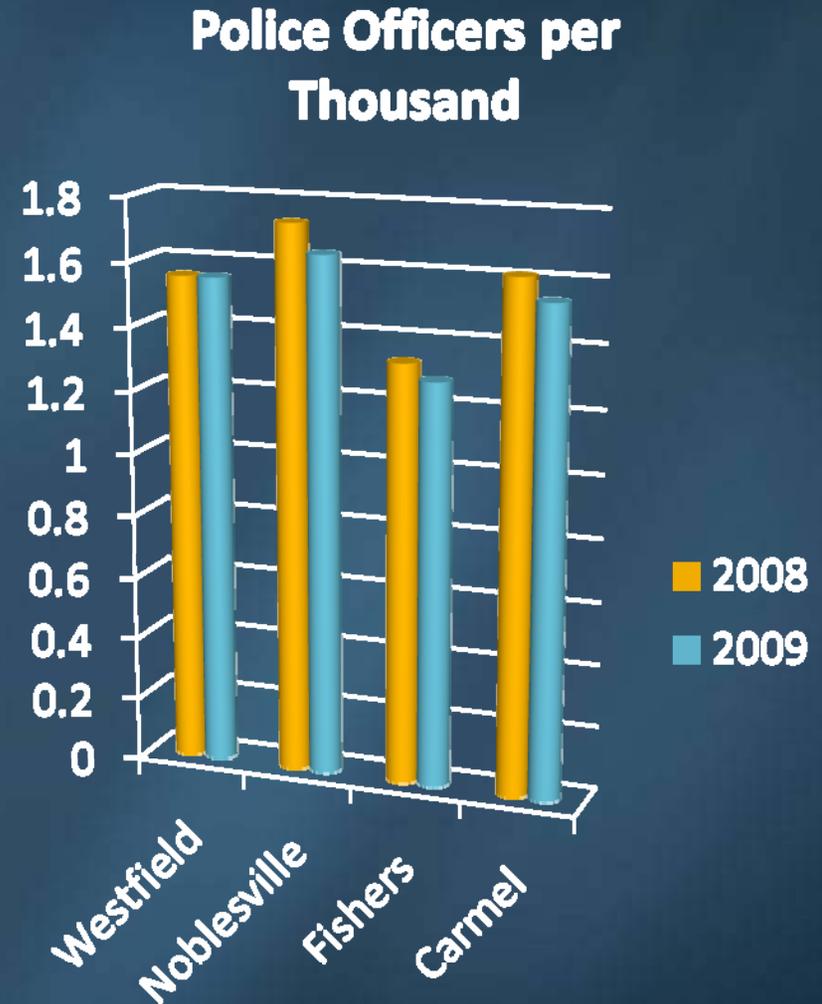


Public Safety Comparisons

Police Officers
Firefighters

Public Safety Comparisons - Police

Community	Police Officers per Thousand 2008	Police Officers per Thousand 2009
Westfield	1.55	1.55*
Noblesville	1.73	1.64
Fishers	1.33	1.28
Carmel	1.61	1.54
Average	1.6	1.5

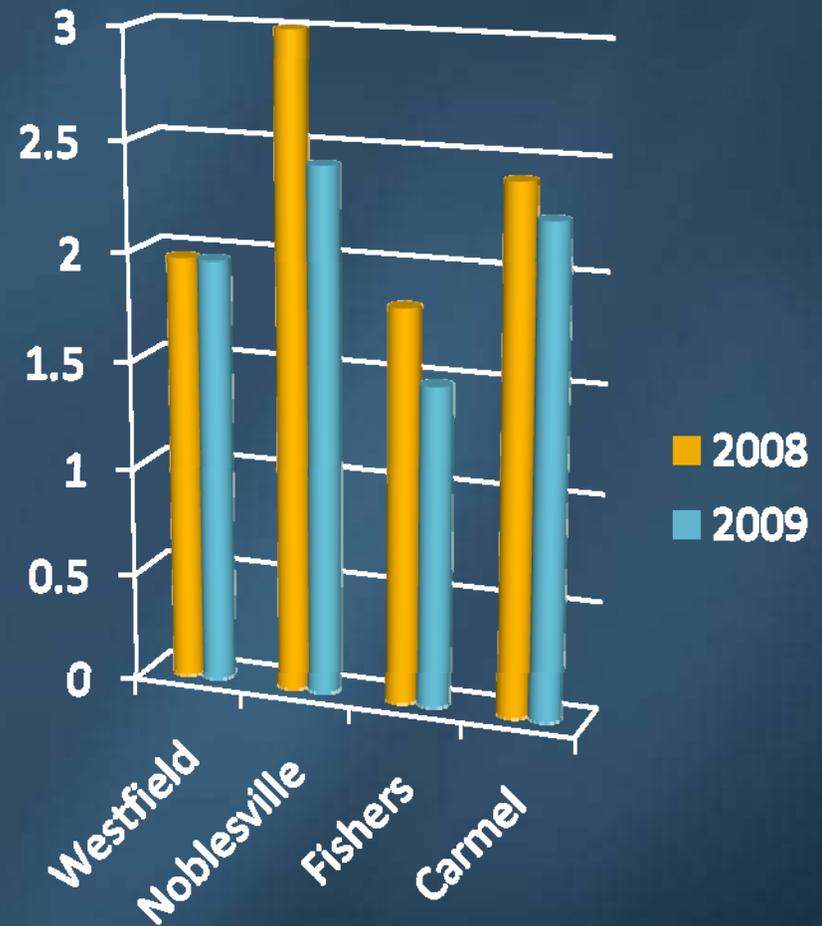


*July Hires: Westfield increased to 1.67

Public Safety Comparisons - Fire

Community	Firefighters per Thousand 2008	Firefighters per Thousand 2009
Westfield	1.96	1.96*
Noblesville	3.0	2.42
Fishers	1.82	1.48
Carmel	2.41	2.25
Average	2.3	2.0

Firefighters per Thousand



*July New Hires: Westfield increased to 2.08

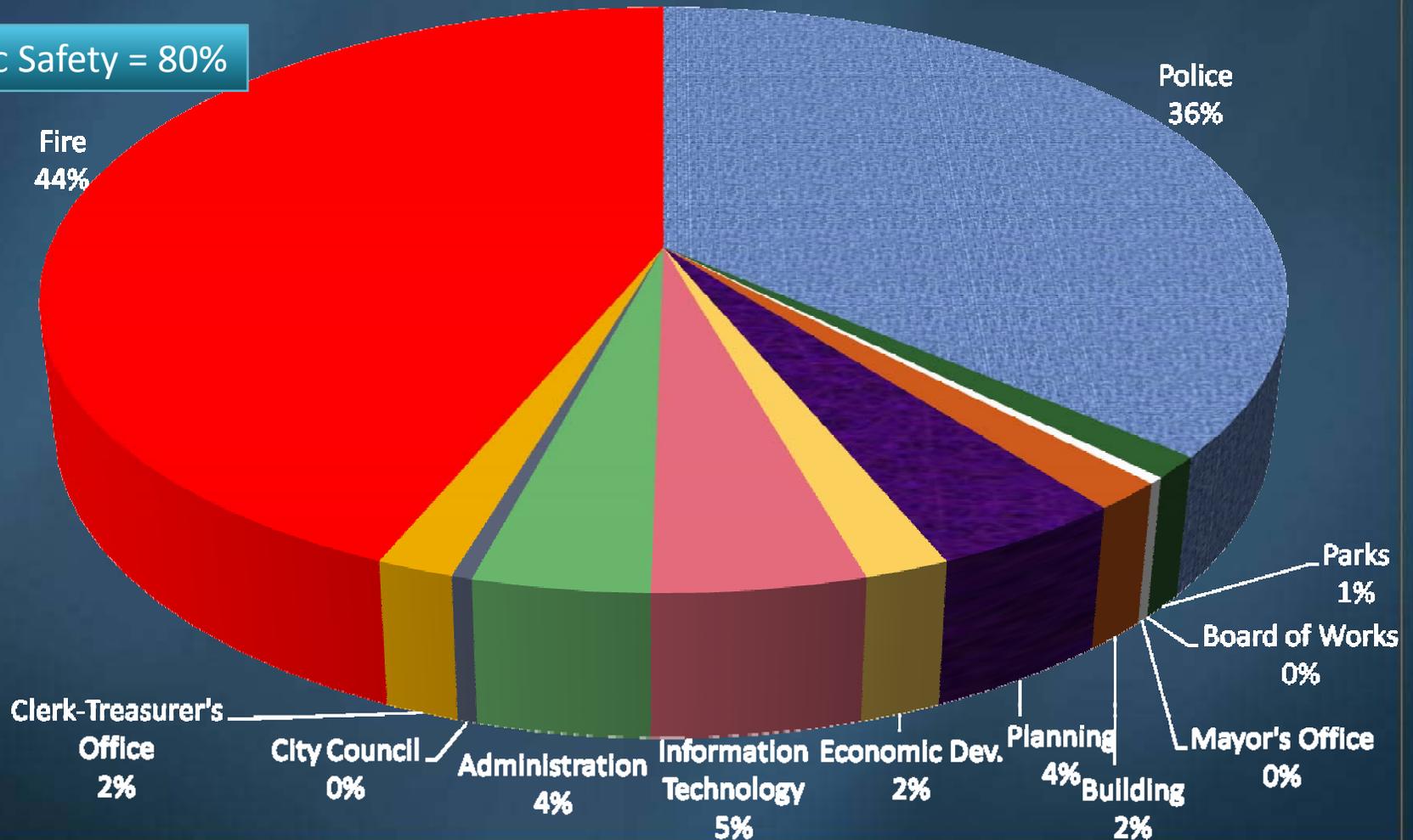
General Fund (Including Fire) by Department

Westfield
Noblesville
Fishers
Carmel

City of Westfield

2009 Total General Fund (and Fire) Budget: \$12,060,564

Public Safety = 80%

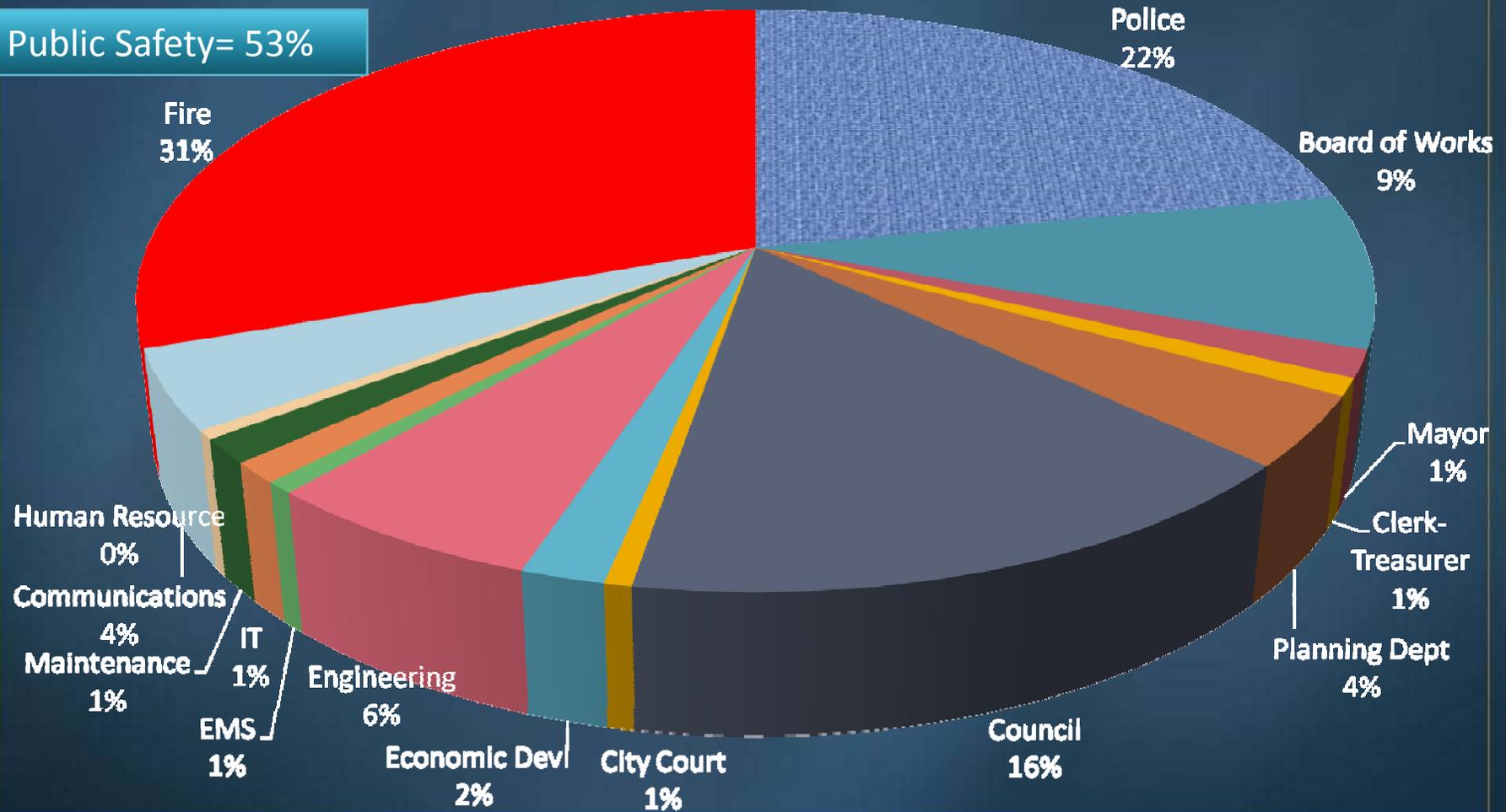


Source: City of Westfield 2009

City of Noblesville 2009

Total General Fund Budget: \$ 39,905,103

Public Safety= 53%

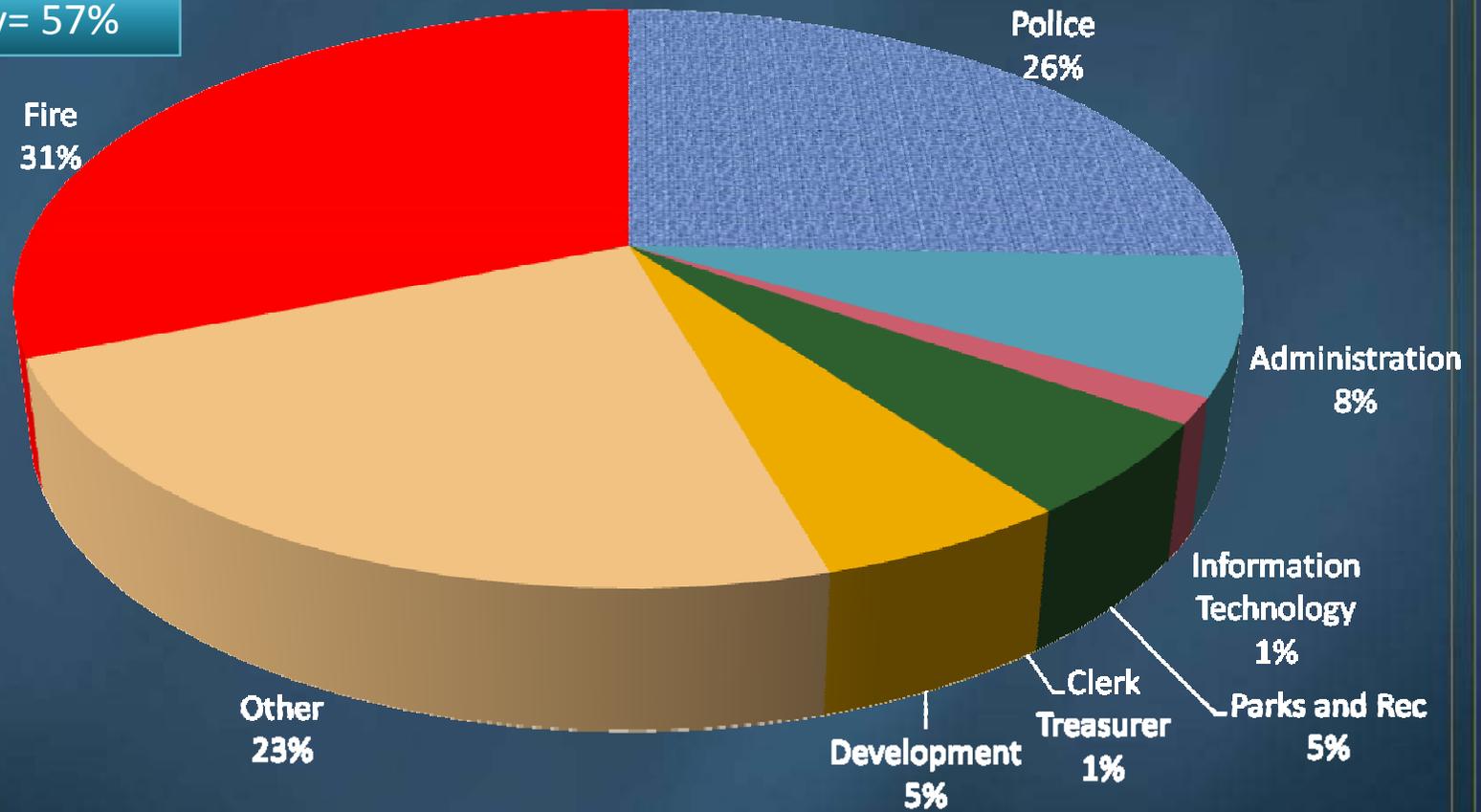


Source: City of Noblesville 2009

Town of Fishers 2009

Total General Fund Budget: \$44,209,701

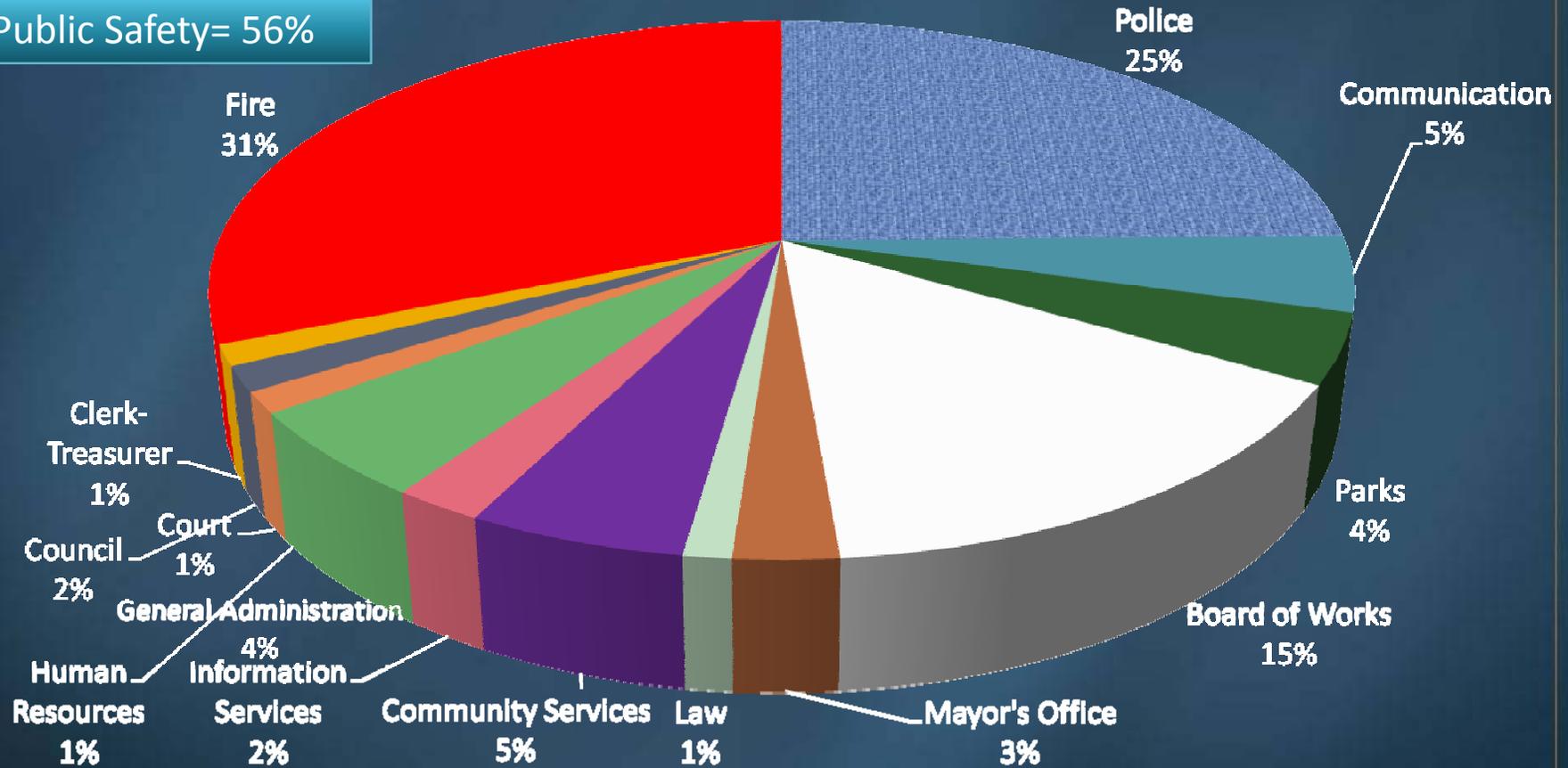
Public Safety= 57%



City of Carmel 2009

Total General Fund Budget: \$62,210,010

Public Safety= 56%



Best Small Towns

America's best small towns (2009)

Community	Metro Area
1. Louisville, CO	Boulder, CO
2. Chanhassen, MN	Minneapolis, MN
3. Papillion, NE	Omaha, NE
4. Middleton, WI	Madison, WI
5. Milton, MA	Boston, MA
6. Warren, NJ	New York, NY
7. Keller, TX	Fort Worth, TX
8. Peachtree City, GA	Atlanta, GA
9. Lake St. Louis, MO	St. Louis, MO
10. Mukilteo, WA	Seattle, WA

Comparison Criteria

- Property taxes are based on a home value of \$250,000 (with a homestead exemption) which has been adjusted for local markets.
- An average of 7,500 gallons of water and wastewater are generated each month.
- (1) 96 gallon container of trash and a minimum of (1) 18 gallon container of recycled materials is collected each week.
- The median household income is \$84,845 and has been adjusted per the cost of living in each community.
- Approximately 28%* of the average annual income is discretionary and subject to sales tax.

Where Westfield fits in

Community	Property Taxes	Utility Cost	Sales Tax	Total
1. Louisville, CO	\$2,148	\$694	\$2,344	\$5,187
9. Lake St. Louis, MO	\$2,970	\$1,072	\$1,838	\$5,880
Westfield, IN	\$3,343	\$1,131	\$1,672	\$6,146
8. Peachtree City, GA	\$4,458	\$1,056	\$1,956	\$7,469
3. Papillion, NE	\$5,389	\$635	\$1,672	\$7,696
7. Keller, TX	\$6,197	\$943	\$1,950	\$9,091
5. Milton, MA	\$5,782	\$1,772	\$1,731	\$9,285
4. Middleton, WI	\$7,268	\$465	\$1,694	\$9,428
10. Mukilteo, WA	\$5,390	\$1,450	\$3,698	\$10,537
2. Chanhassen, MN	\$7,397	\$764	\$2,512	\$10,673
6. Warren, NJ	\$12,304	\$1,872	\$3,142	\$17,319

A \$250,000 home in Westfield will buy* you....

Westfield, IN
4,370 sq ft / 0.24 acres



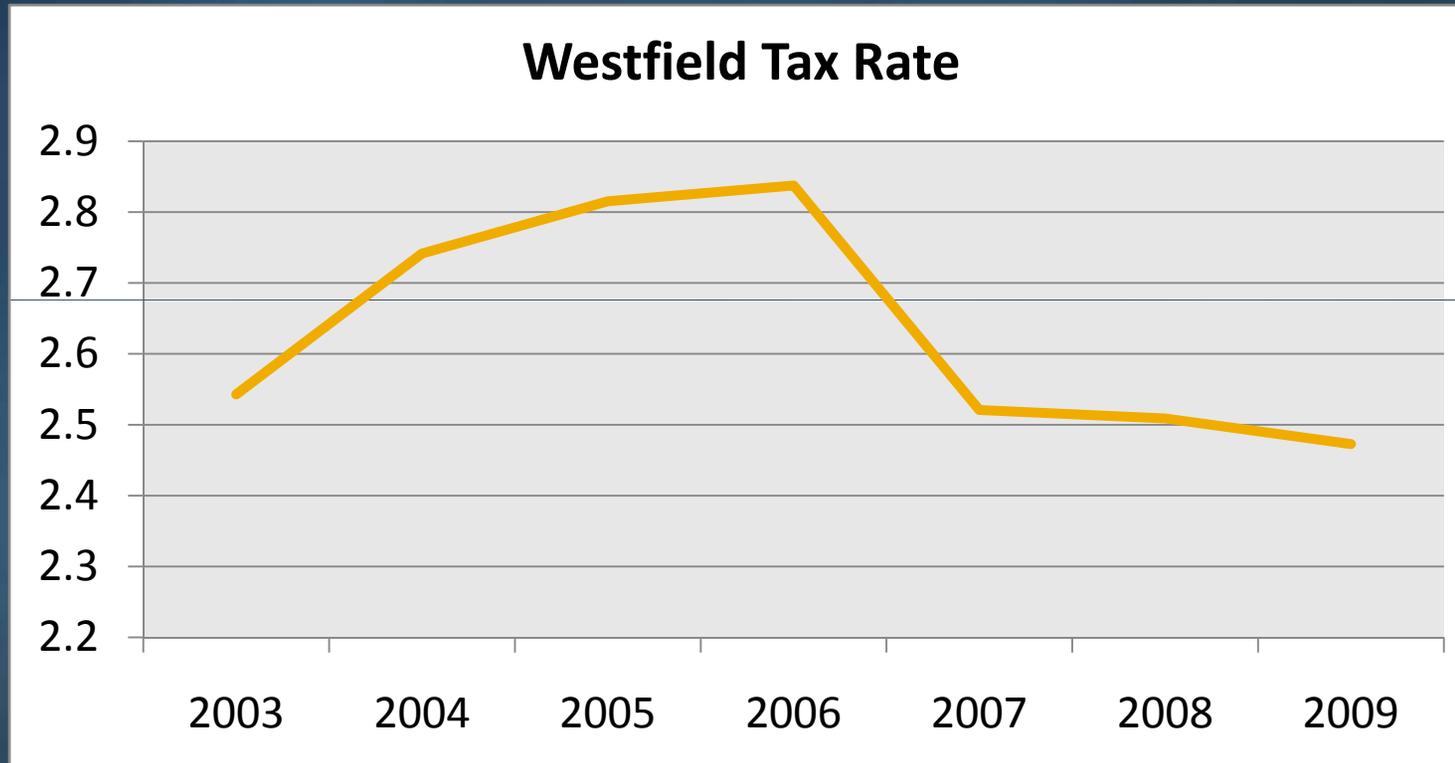
Louisville, CO
1,555 sq ft / 0.14 acres



Lake St. Louis, MO
2,596 sq ft / 0.31 acres

*Home value has been adjusted for the local market.

Vision – Stable/Declining Tax Rate



Budget Highlights (Changes 2009-2010)

All

- Salary Increases

Administration

- Transferred 7 PW employees to Admin
- Hire Human Resources Assistant

Clerk's Office

- Increases due to added personnel

Community Development

- Transferred vehicle to Informatics
- Digitization of records initiative
- Increased some staff to 40 hour work weeks (from 37.5)

Economic Development

- Decreased focus on Japan Initiative
- Increased printing to support marketing Initiative

Fire

- Competitive adjustments to specified rank levels
- 3 additional firefighters and equipment

Informatics

- Infrastructure and security upgrades

Parks

- Realistic staff, operating and maintenance supplies requirements

Police

- 3 additional police officers and equipment
- 12 hour shift conversion

Public Works

- LRS - Increase in operating costs
- MVH - Increase in operating costs

2010 Budget Advertisement

Fund Name	Budget Estimate	Maximum Estimated Funds to be Raised by Tax Levy	Excessive Levy Appeals	Current Tax Levy
General	\$10,466,950	\$8,075,236	\$2,500,000	\$5,465,915
Debt Service 546	580,520	765,318	0	607,712
Bond #2 308	190,431	397,432	0	186,854
Bond #3 312	365,298	508,821	0	330,050
LR & S	325,000	0	0	0
MVH	843,319	277,078	0	73,345
Fire	6,575,500	5,469,563	1,500,000	3,999,024
CCI	110,000	0	0	0
CCD	1,000,000	1,060,244	0	873,149
Rainy Day	148,483	0	0	0
TOTAL	\$ 20,605,501	\$ 16,553,692	\$ 4,000,000	\$ 11,536,049

2009 Budget vs. 2010 Budget

General Fund	2009 Actual	2010 Budget	% Difference
Mayor	41,603	45,000	8%
City Council	54,589	55,993	3%
Board of Works	200	210	5%
Administration	468,327	2,125,698	354%
Clerk Treasurer	225,199	240,000	7%
IT	564,184	976,550	73%
Parks	144,994	497,500	243%
CD-Planning	514,811	535,000	4%
CD-Building	191,504	185,000	(3%)
Police	4,379,786	5,071,000	16%
Economic Dev.	225,711	235,000	4%
General Fund Total	6,810,908	9,966,951	46%

2009 Budget vs. 2010 Budget

Fund	2009 Actual	2010 Budget	% Difference
Fire Operating	5,269,650	6,075,500	15%
MVH	522,209	743,319	42%
LRS	287,752	325,000	13%
CCD	750,000	752,000	0%
Debt Service (PSB)	554,962	554,962	0%
Bond #2	154,725	154,725	0%
Bond #3	276,598	276,598	0%
Grand Total of Funds	14,626,804	18,849,055	29%

Summary

- Trash Initiative
- Employee Ratios

	Westfield	Noblesville	Fishers	Carmel
Employees per Thousand Ratio	7.55 *4.16	9.02**	5.48*** 5.38 without sewer	9.27

- Additional Public Safety Personnel (Police and Fire)
- Upgraded S&P Bond Rating to AA-, stable outlook
- Trails Development
- Grand Junction Development
- Family Sports Capital of America

* Westfield adjusted rate if no water and sewer utility

** Noblesville doesn't operate a water utility as part of local government services

*** Fishers doesn't operate a water utility as part of local government services and the majority of the sewer system is operated by a private utility (Hamilton Southeastern Utility)

Summary

- Collaboration with the schools and other taxing districts to work towards the goal of 2.47 or less

Year	NAV	Tax Bill	Delinquency Fee	Jurisdiction	Westfield Tax Rate	Noblesville	Fishers	Carmel	Water	Sewer	Storm	Trash	Total Public Services
2003	209,200	\$3,672.28		Twp	2.5429	2.3629	2.0406	1.6814	\$269.62	\$403.08		\$180	\$4,524.98
2004	209,200	\$3,997.42	\$179.72	Twp	2.7416	2.5113	2.0676	1.9676	\$238.69	\$463.95		\$192	\$5,071.78
2005	247,200	\$4,089.34		Twp	2.8154	2.5719	2.1935	2.0317	\$198.58	\$461.37		\$204	\$4,953.29
2006	247,200	\$3,988.30		Twp	.8376	2.6131	2.2649	2.0920	\$200.43	\$467.87		\$216	\$4,872.60
2007	290,500	\$4,437.94		Twp	2.5208	2.5201	2.1123	1.9121	\$232.32	\$438.18		\$228	\$5,336.44
2008	290,500	\$3,569.76		City	2.5089	2.6126	2.1640	2.0090	\$260.59	\$485.55	\$33.00	\$240	\$4,588.90
2009	290,500	\$3,139.06		City	2.4728	2.4748	1.9264	1.7319	\$291.20	\$538.35	\$33.00	\$132	\$4,133.61
2010	290,500	\$2,905.00		City	<2.4728	?	?	?	\$326.14	\$597.18	\$33.00	\$132	\$3,993.32

Questions and Answers