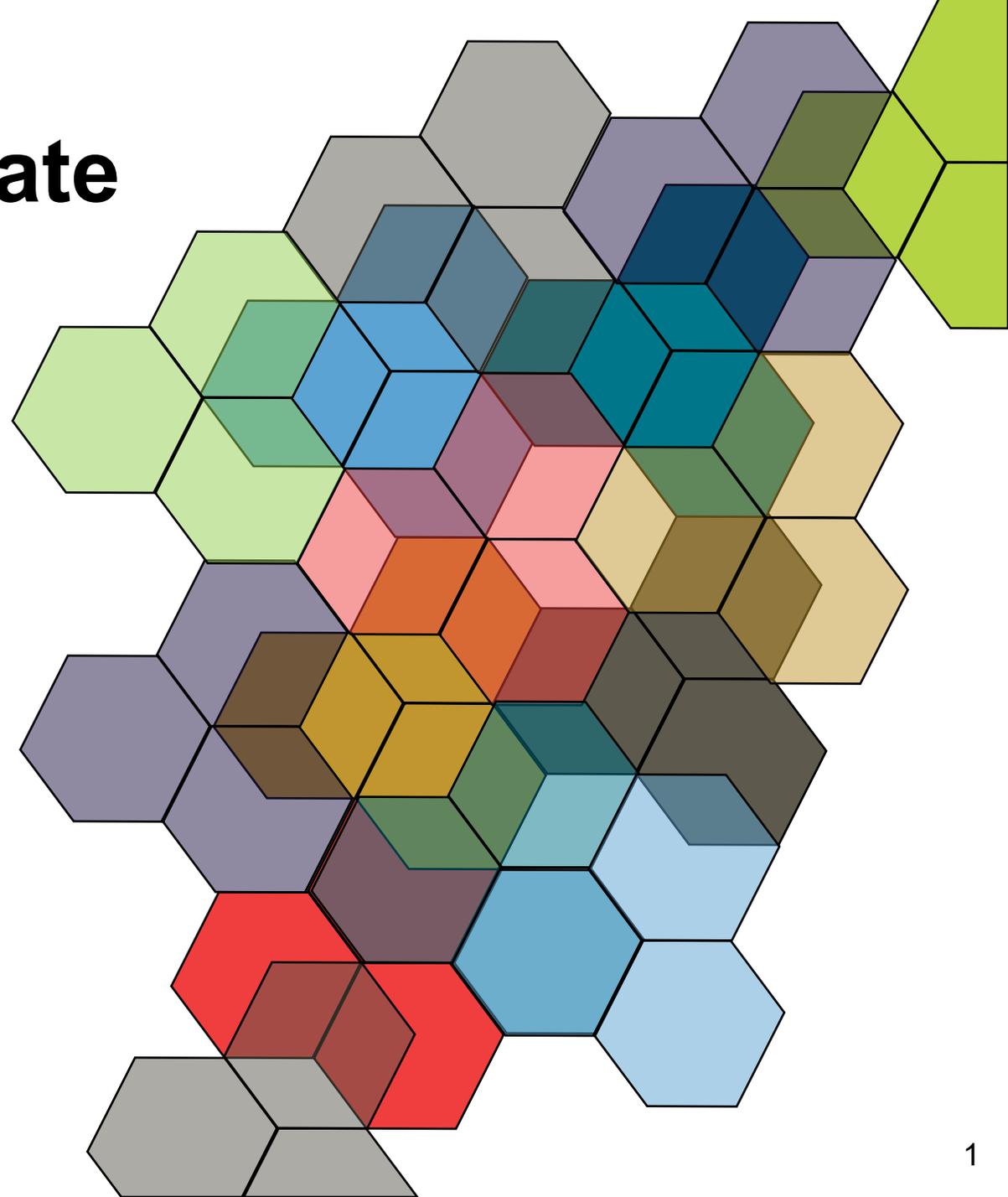


FY2025 Budget Engagement Update & Survey Findings

Mecklenburg County Board of Commissioners
April 23, 2024



FY2025 Budget Engagement Strategy

Representative
Budget Survey

Opt-in Budget
Survey

Outreach to
High-Traffic
Areas & Events

Student
Outreach &
Education

Advisory Board
Feedback

Online Budget
Simulator

Two Public
Hearings

Student Outreach and Education

- Staff hosted 12 outreach sessions to youth with approximately 300 total participants.
- Staff presented an overview of County government and budget, then students were given the opportunity to participate in an activity



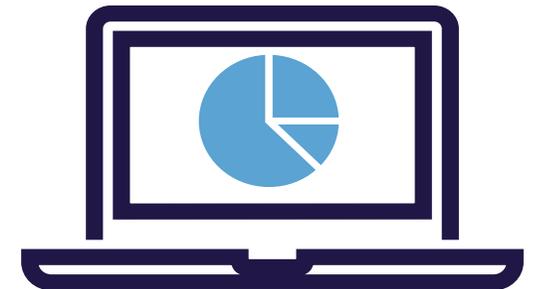
Student Outreach and Education

- GenerationNation
- GenOne (2 sessions)
- Hopewell High School (10 classes over 5 sessions)
 - All CMS high and middle school teachers were offered the opportunity for OMB presentation
- CPCC Macroeconomics course
- UNCC Introduction to Public Policy
- UNCC MPA Budgeting
- Queens University Community Engagement



Budget Simulator

- The Budget Simulator allows participants to make revenue and expense adjustments to balance the County's Budget and is available year-round.
- As part of the FY2025 engagement strategy, promotion of the simulator has increased, including the following:
 - Highlights on budget.mecknc.gov
 - Promotion on billboards and County social media
 - Inclusion in newsletters sent to community groups, ARPA recipients, ENN, and others
- The simulator has been updated with the net growth revenue presented at the retreat and will allow users to submit an unbalanced budget.
- As of 4/16/2024, the results are as follows:
 - Page Views: 1,730
 - Submissions: 28





Budget Survey

Purpose



Gather input from residents to help inform decisions related to the FY2025 budget

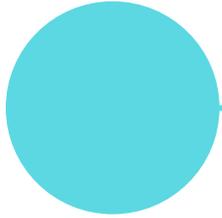


Objectively assess needs for County programs/services



Identify priorities for investment based on input from residents

Methodology

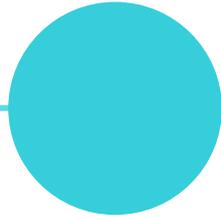


Survey

Conducted by ETC Institute, which has conducted more than 20 surveys for the County during the past 2 decades

This survey was focused on budget priorities

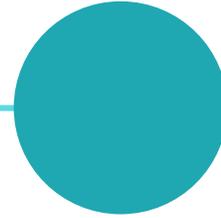
Department Directors and County Staff identified public-facing areas of potential investment



Administration

Administered by mail, phone and online

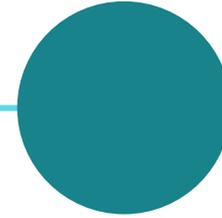
Participation was encouraged via texts, emails and social media ads



2 Samples

Random Sample designed to ensure results are statistically valid for each of the County's 6 Commission Districts

Non-Random Sample was open to anyone in the County



5,332 Completes

Random Sample 1,941 surveys with at least 300 in each commission district; error of +/- 3% at the 99% level of confidence

Non-Random Sample 3,381 surveys were completed by residents who opted-in

Opt-In Survey Marketing Strategies

- Strategy of broad and targeted marketing to maximize awareness and participation.
- Goal to increase total surveys completed and continue targeted outreach to historically underrepresented groups.

Proactive Comm's

- Story on MeckNC.gov
- News release to all local media, including newspapers, radio, TV.
- Employee News Now
- Board Bulletin, encouraging them to share link
- Cabinet Update with link

Digital

- Broad Social Media posts and paid ads
- Email blast to Community Relations email list (4,000+)
- Geofenced digital ads in targeted zip codes
- Ads on MeckTV
- 4th Street Billboard
- Other digital billboards across the County
- Email blasts from LIB and PRK

Printed

- Postcard with QR code link to survey
- Distributed at high-traffic County facilities (CRCs, Park Facilities, Congregate Meal sites, Libraries)

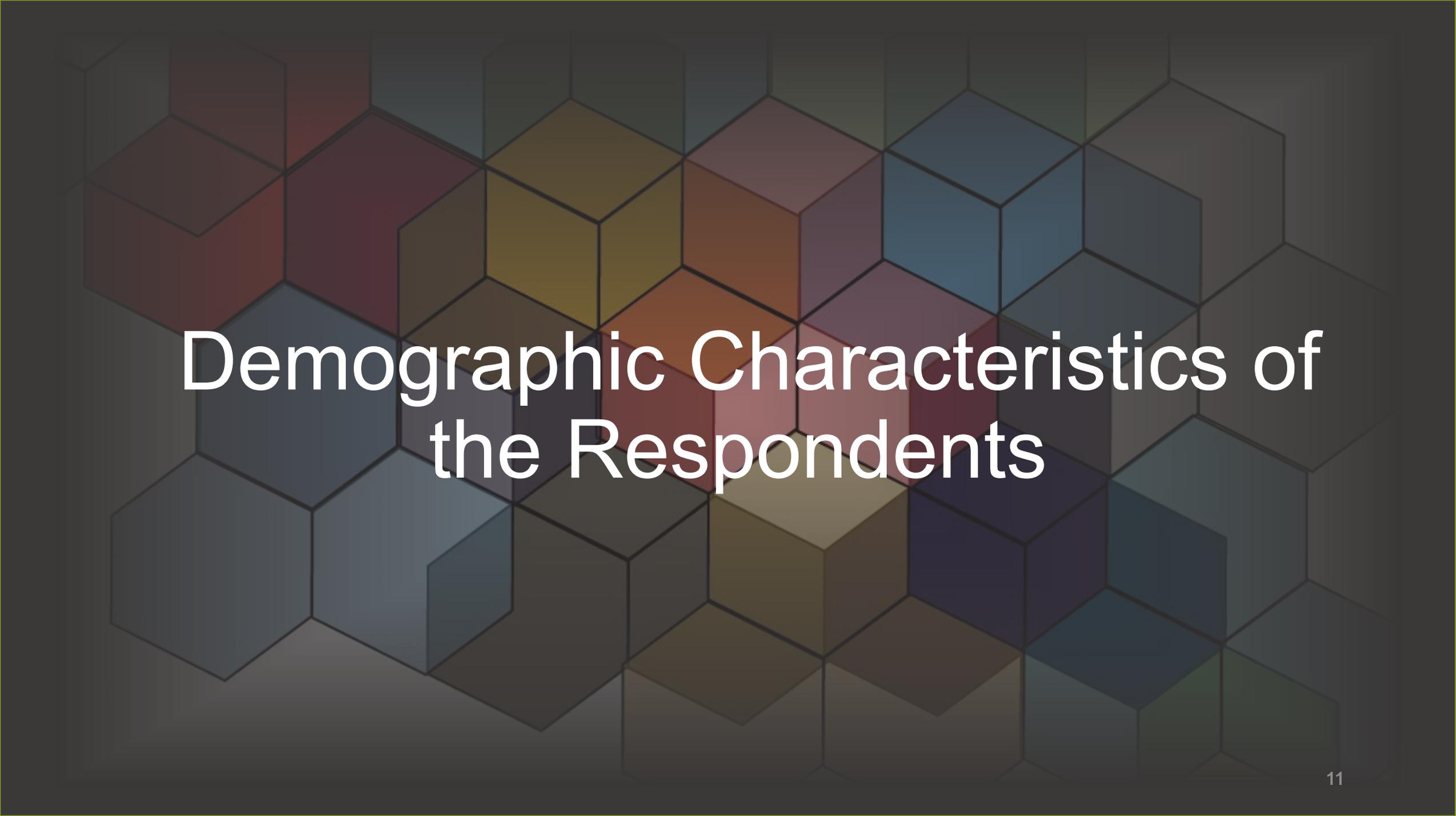
Outreach & Partners

- Public Health & CFAS community-facing staff were provided postcards
- OMB staff attended community events to distribute postcards and encourage survey participation
- OMB provided swag in the form of t-shirts, bags, and frisbees for residents that take a postcard

Opt-In Survey Outreach in High-Traffic Areas

- Budget Office staff reached over 500 residents across 10 events around the County
 - Charlotte Checkers games (2)
 - Eastway Recreation Center
 - Northern Regional Recreation Center (Senior Meals)
 - Johnson C. Smith
 - Central Piedmont Community College
 - Harper Campus
 - Harris Campus
 - Central Campus (2)
 - Jury Pool
- Staff engaged directly with residents, answering questions and facilitating discussion about the County budget
- Staff handed out postcards with links to the budget survey as well as giveaways for residents





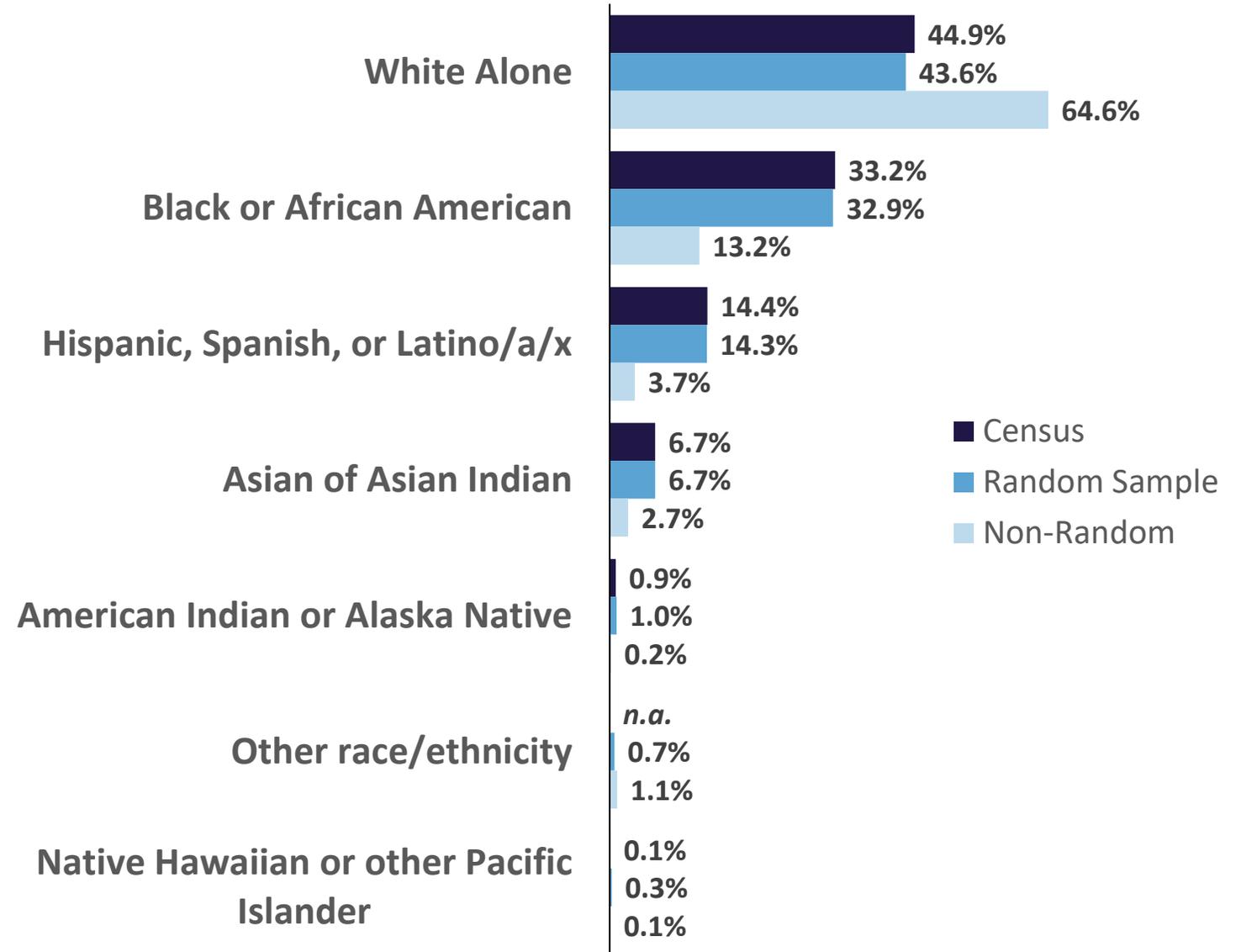
Demographic Characteristics of the Respondents

Representation by Race/Ethnicity

- Responses to the random sample total 1,981 and closely match the community by race & ethnicity.
- Response to the non-random sample total 3,391.

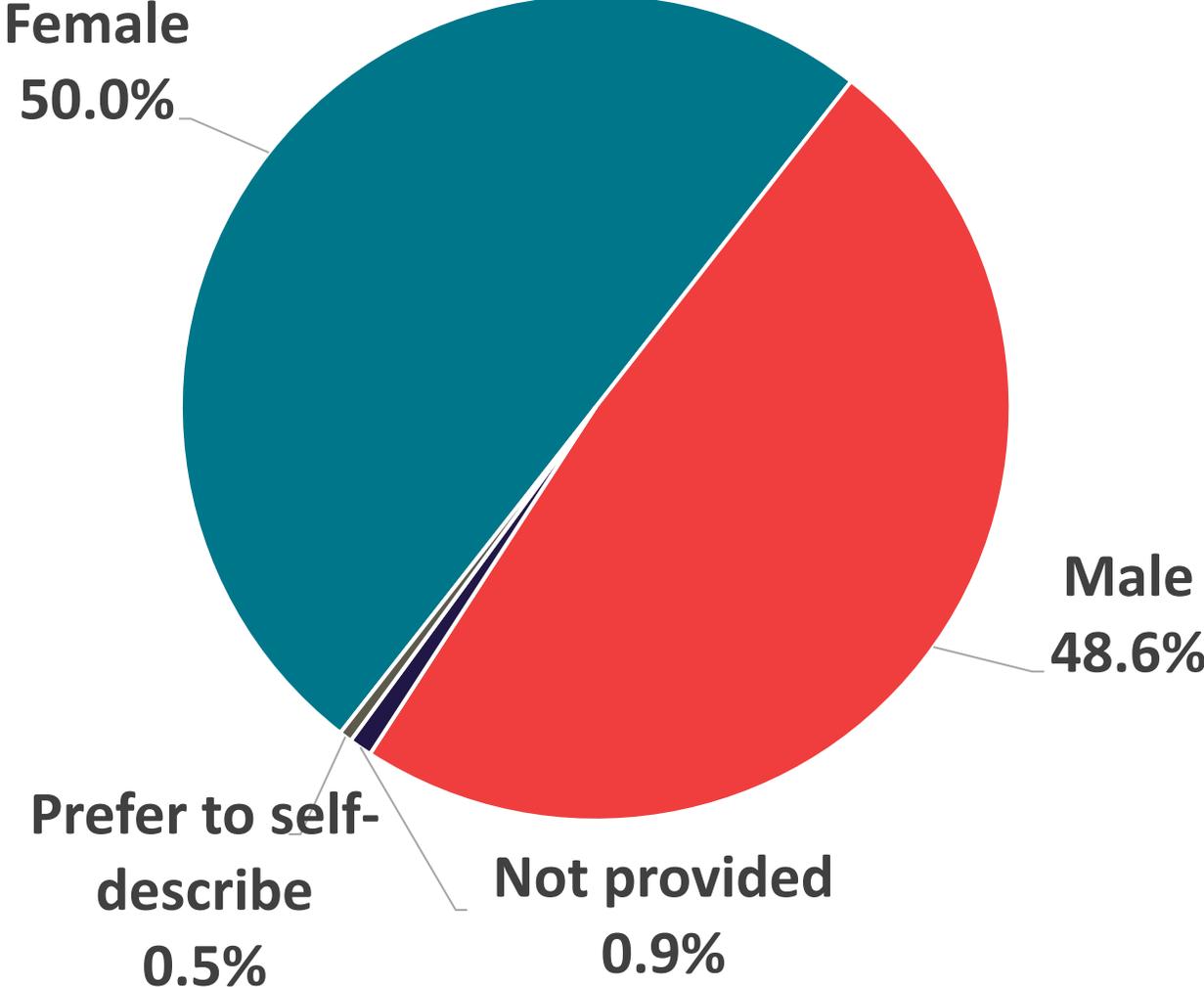
Response By Race/Ethnicity

By Percentage of Respondents

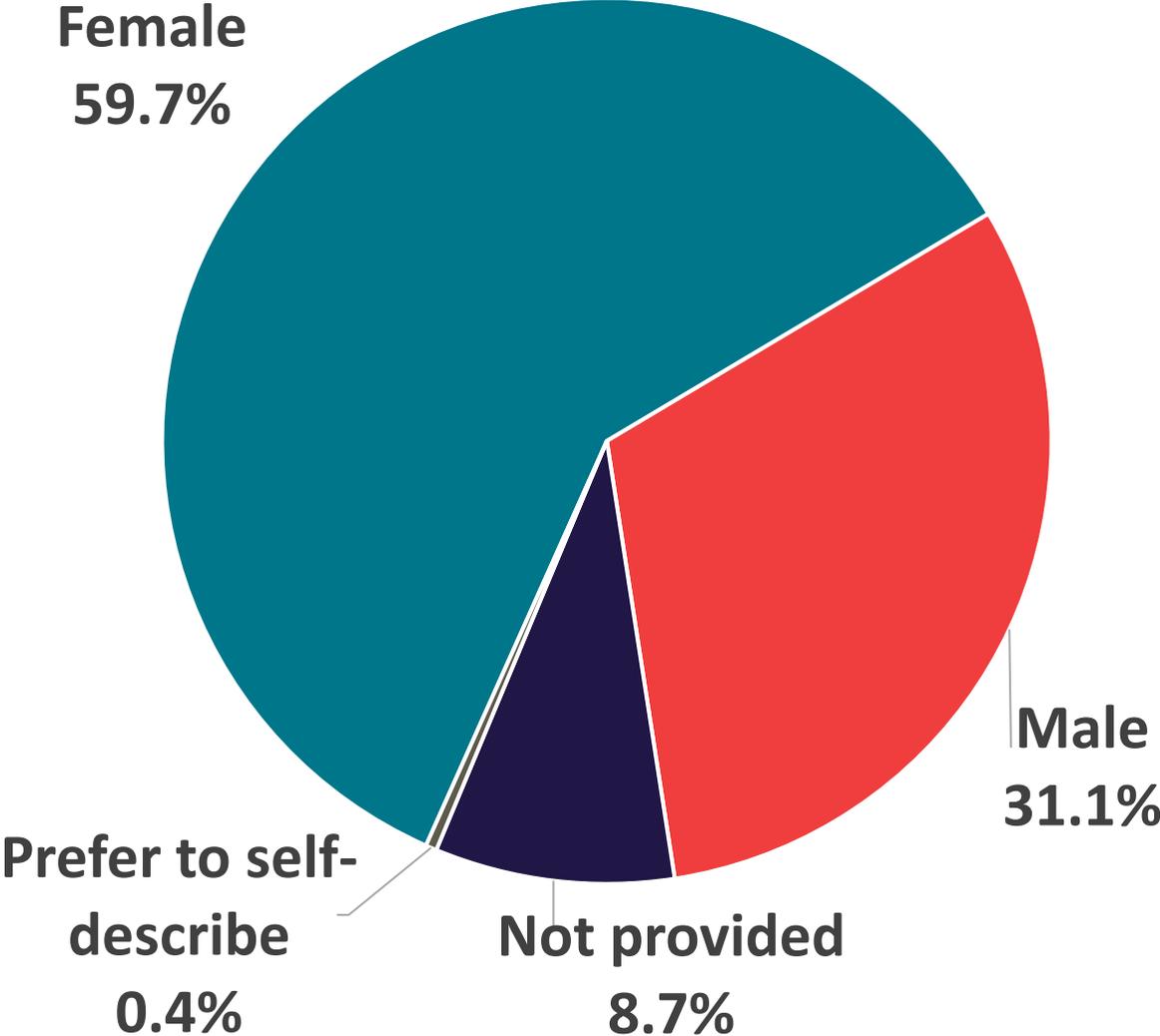


Gender

Random Sample

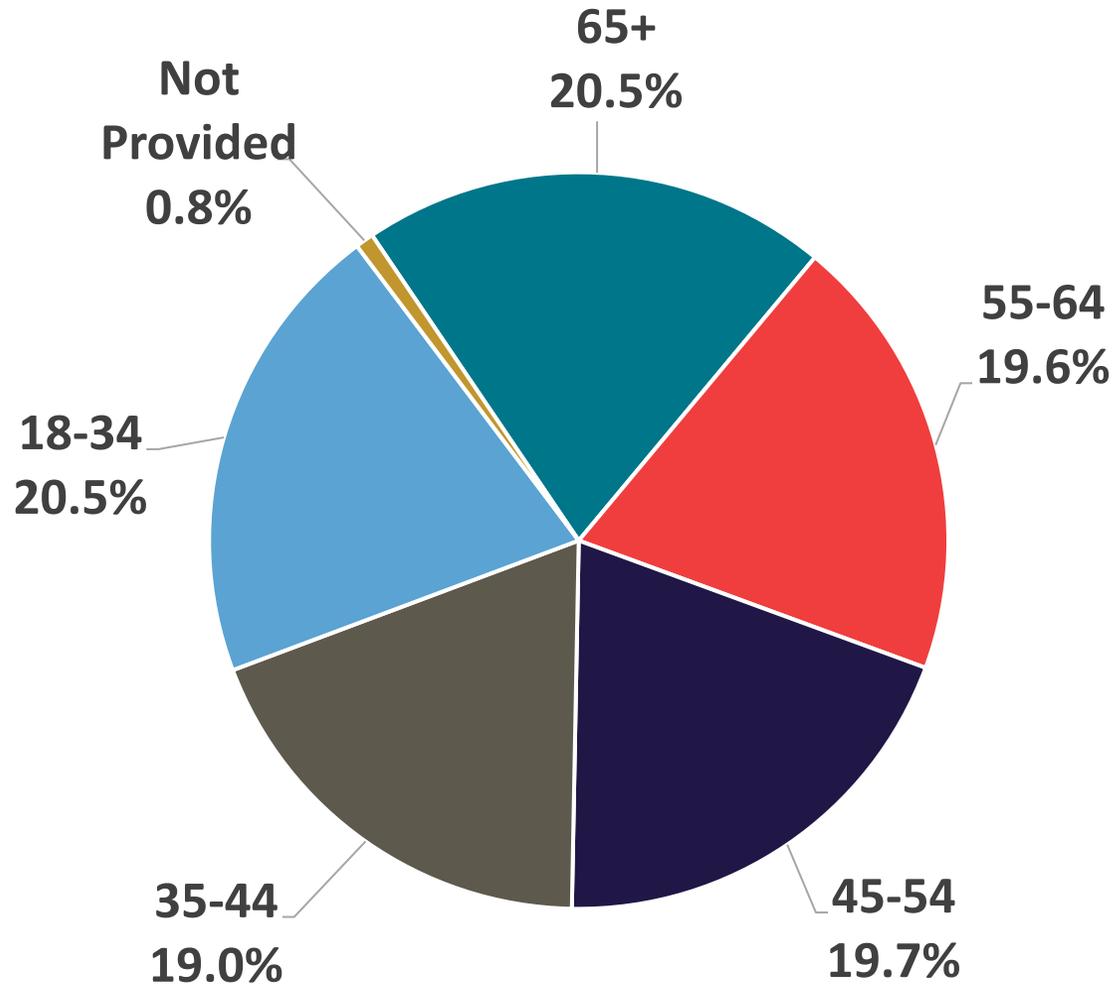


Non-Random

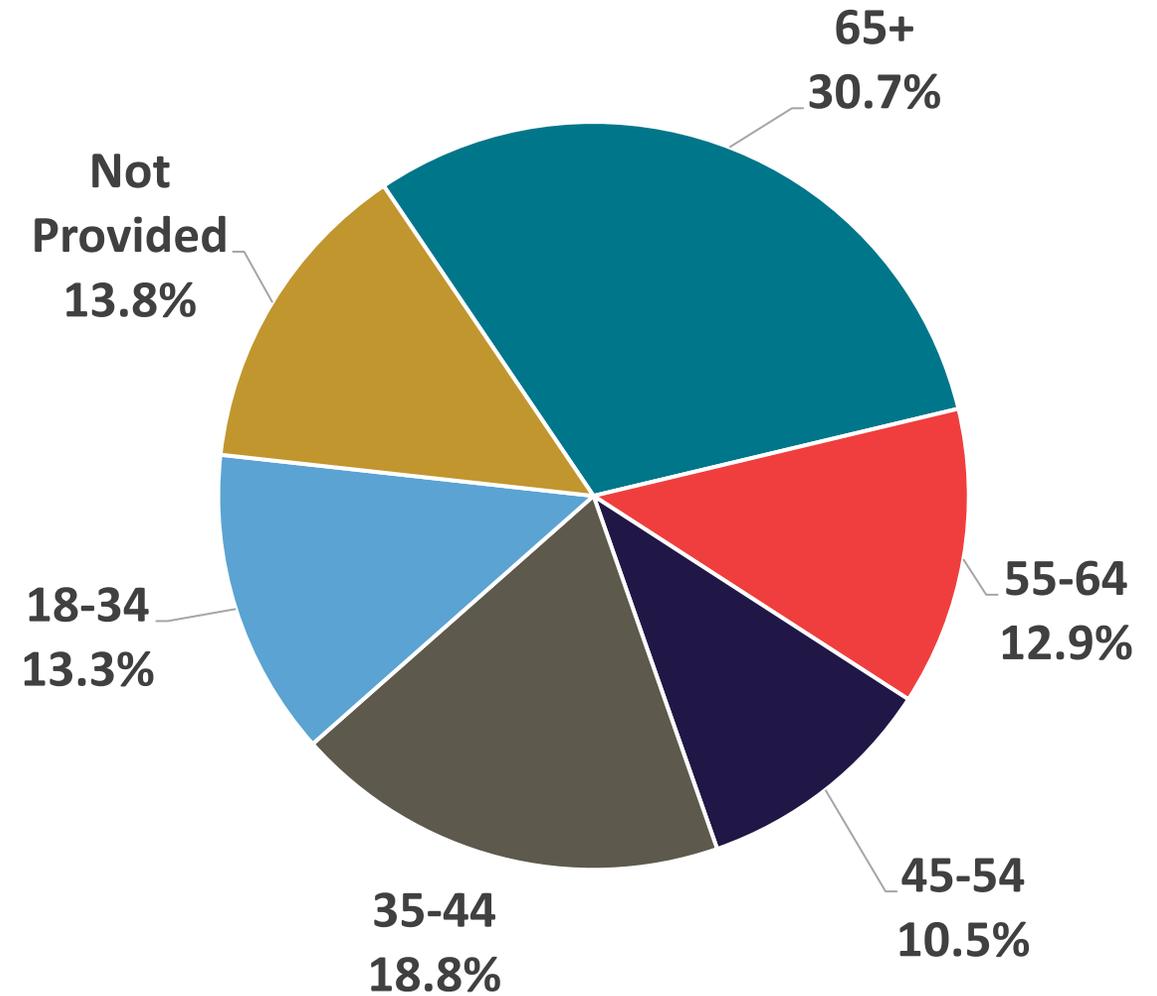


Age

Random Sample

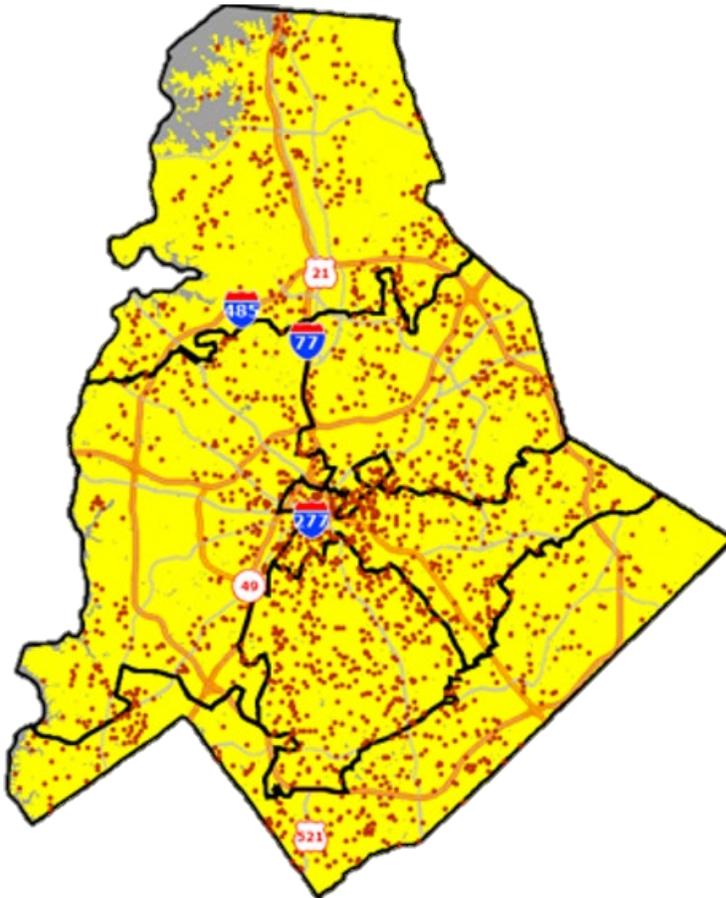


Non-Random



Location of Random Sample Responses

1,941 respondents in the random sample with a minimum of 300 surveys from each of the County's 6 Commission Districts



Commission District	# Random Surveys Completed	# Non-Random Surveys Completed	Total Surveys Completed
1	341	502	843
2	302	257	559
3	303	239	542
4	321	503	824
5	348	678	1026
6	326	553	879
Not Provided	0	659	659
TOTAL	1941	3391	5332

How Will the Data from the Random vs. Non-Random Samples Be Used?

- The next few slides and major findings in this report are based on the *random sample*.
- The data from the *non random sample* will be included in the dashboard ETC Institute is developing to allow a deeper analysis of the data based on location and demographics attributes of the respondents

Survey Design/Assessment Methodology

- Survey was designed to identify priorities for investment
- The methodology used ETC Institute's Priority Investment Rating (PIR), which is a budget prioritization tool that was originally developed by ETC Institute for the U.S. Army in 2005. The tool was used to help the U.S. Army set priorities for capital improvements at Army installations based on the importance soldiers and supported populations placed on services/ facilities and the needs for these services/facilities and the priorities

Survey Design Continued

Over the past 19 years, ETC Institute's Priority Investment Rating (PIR) has been used by leaders in more than 500 local governments to set investment priorities for a wide range of local governmental services, programs, and facilities.

ETC Institute's PIR helps leaders use input from residents to help set priorities based on (1) the importance residents think county leaders should place on these programs/services/facilities in the budget and (2) the unmet need for these programs/services/facilities:

- 50% of the PIR score is from the **IMPORTANCE** Rating (maximum of 100 points)
- 50% of the PIR score is from **NEEDS** Rating (maximum of 100 points)

Priority Investment Rating

Top four services/programs/facilities that should be priorities for funding in FY2025

Importance

How Well Needs Being Met

How well are your household needs for services/programs/facilities being met?

Only on Those Needing The Service

Excluding response with no need

Importance

Need for Service

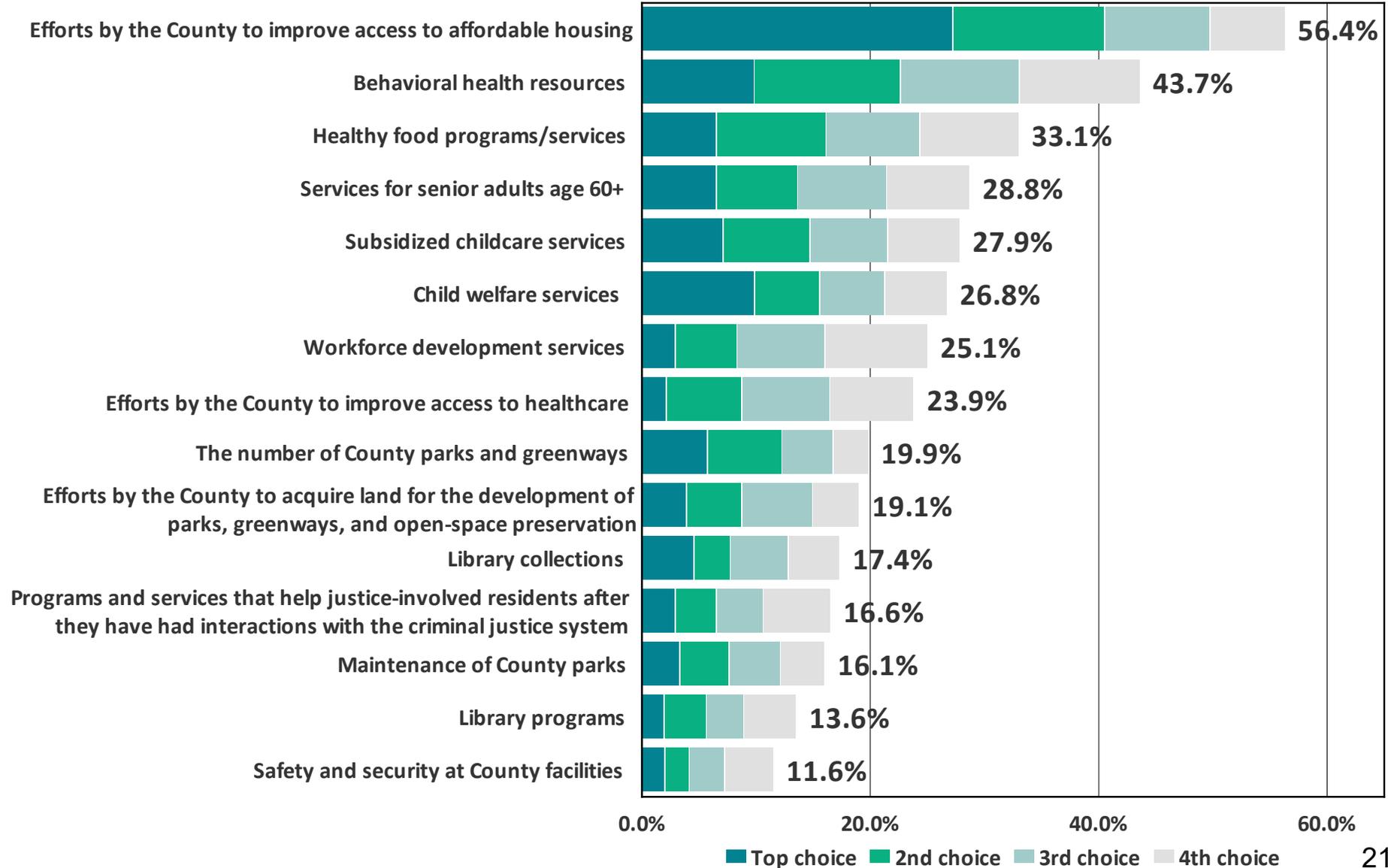
Priority Investment Rating



Part 1:
Assessment of Importance
IMPORTANCE RATING

Services/Programs/Facilities that Residents Thought Should Be Prioritized Most in the FY2025 Budget Process

by percentage of respondents who selected the items as one of their top four choices

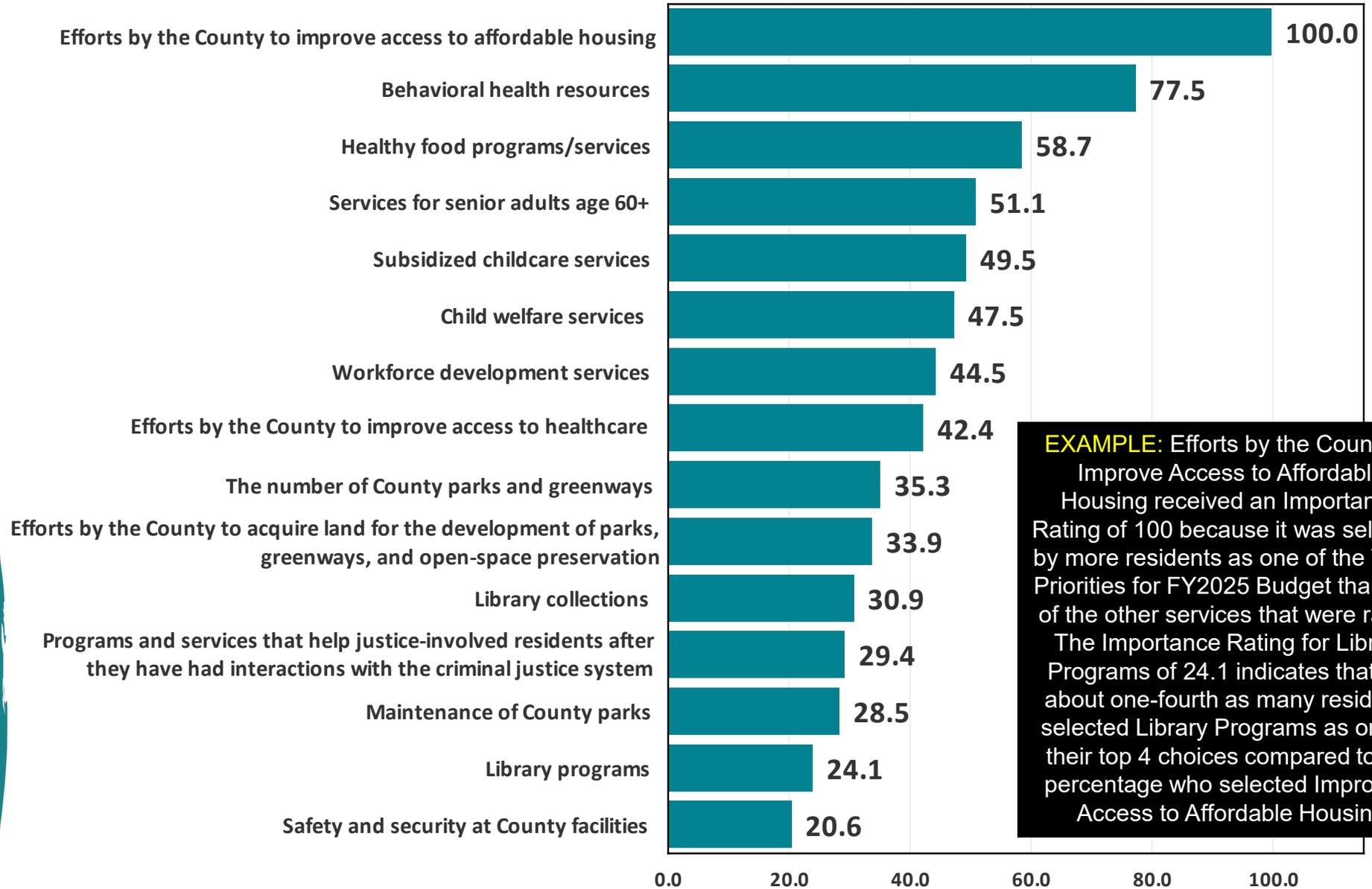


Step 1:
 Determine the Percentage of Residents Who Thought Various Services, Programs and Facilities Should Be Prioritized as One of the Highest Priorities During the FY 2025 Budget Process

Importance Rating for County Services, Programs, and Facilities

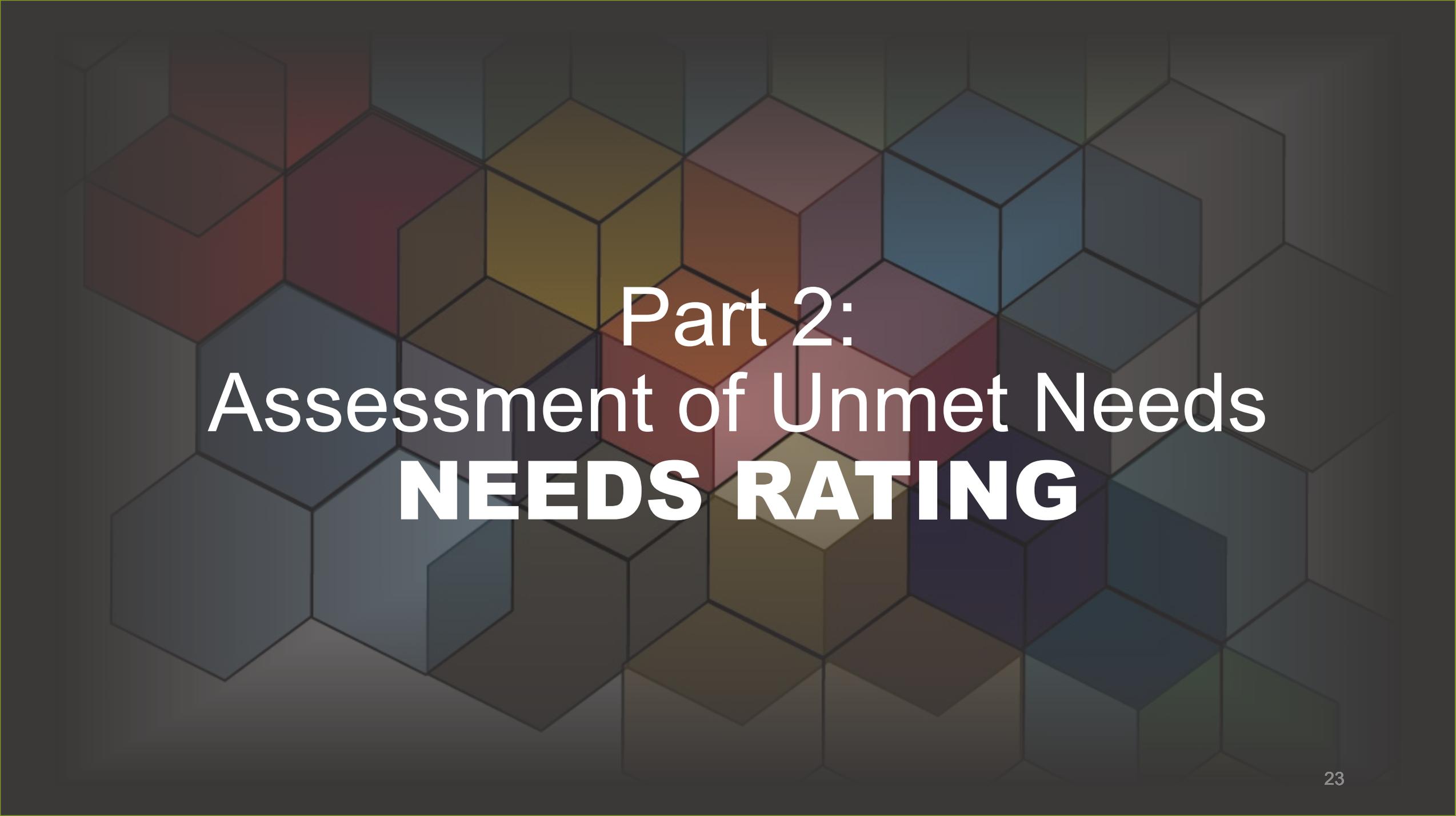
the rating for the item rated as the most important=100

the rating of all other items reflects the relative level of importance for each item compared to the item rated as the most important



EXAMPLE: Efforts by the County to Improve Access to Affordable Housing received an Importance Rating of 100 because it was selected by more residents as one of the Top 4 Priorities for FY2025 Budget than any of the other services that were rated. The Importance Rating for Library Programs of 24.1 indicates that the about one-fourth as many residents selected Library Programs as one of their top 4 choices compared to the percentage who selected Improving Access to Affordable Housing

Step 2:
Calculate the Importance Rating, which is an Index that Shows the Relative Importance Residents Placed on Each Item to the Item that Was Most Important

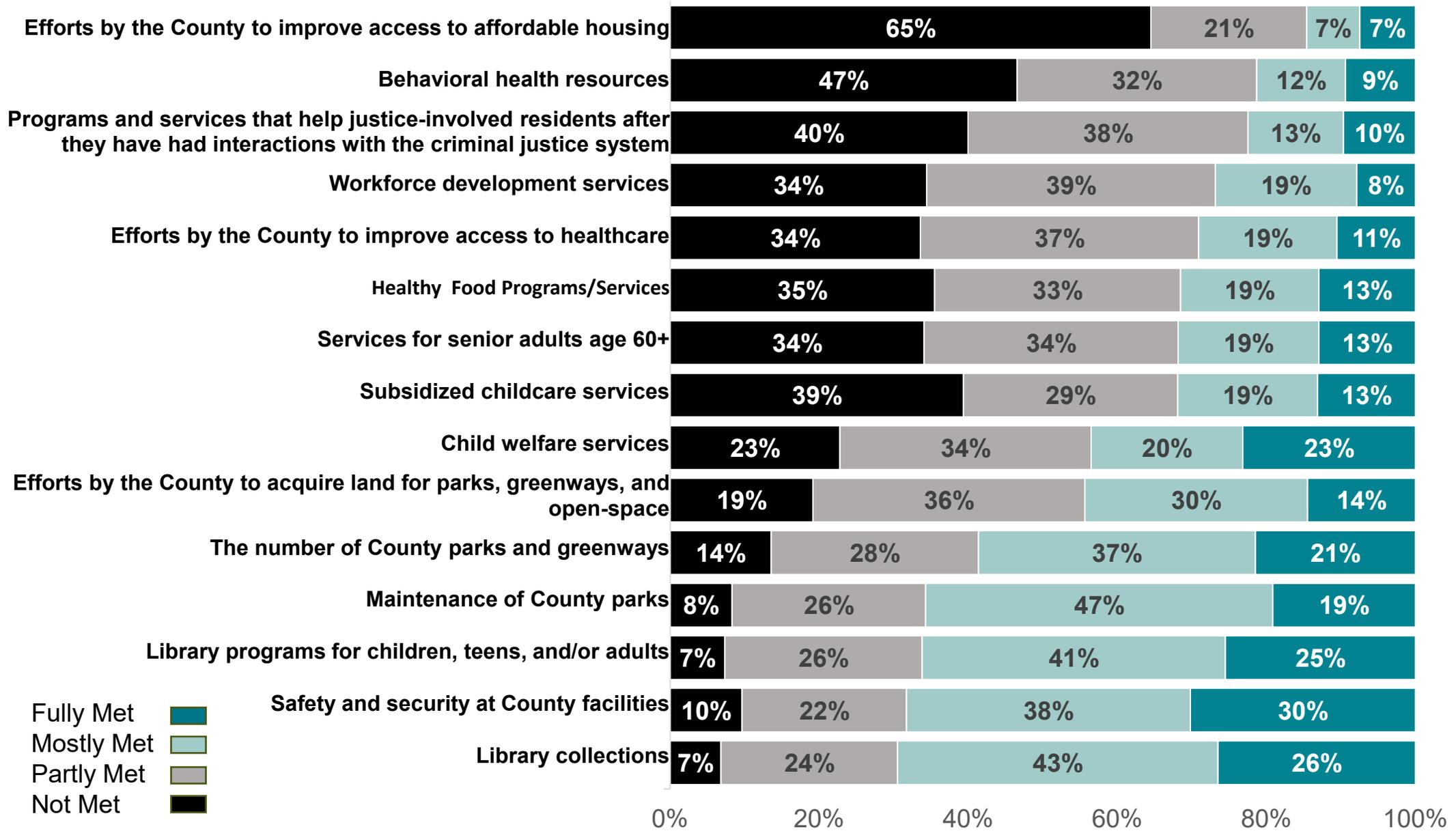


Part 2:
Assessment of Unmet Needs
NEEDS RATING

How Well Needs for County Programs, Services, & Facilities are Currently Being Met

by percentage of all respondents (excluding those with no need)

Step 1:
Assess
How well
needs for
County
services,
programs,
and
facilities
are being
met
among only
those with
a need for
the item



Excludes respondents indicating no-need at all

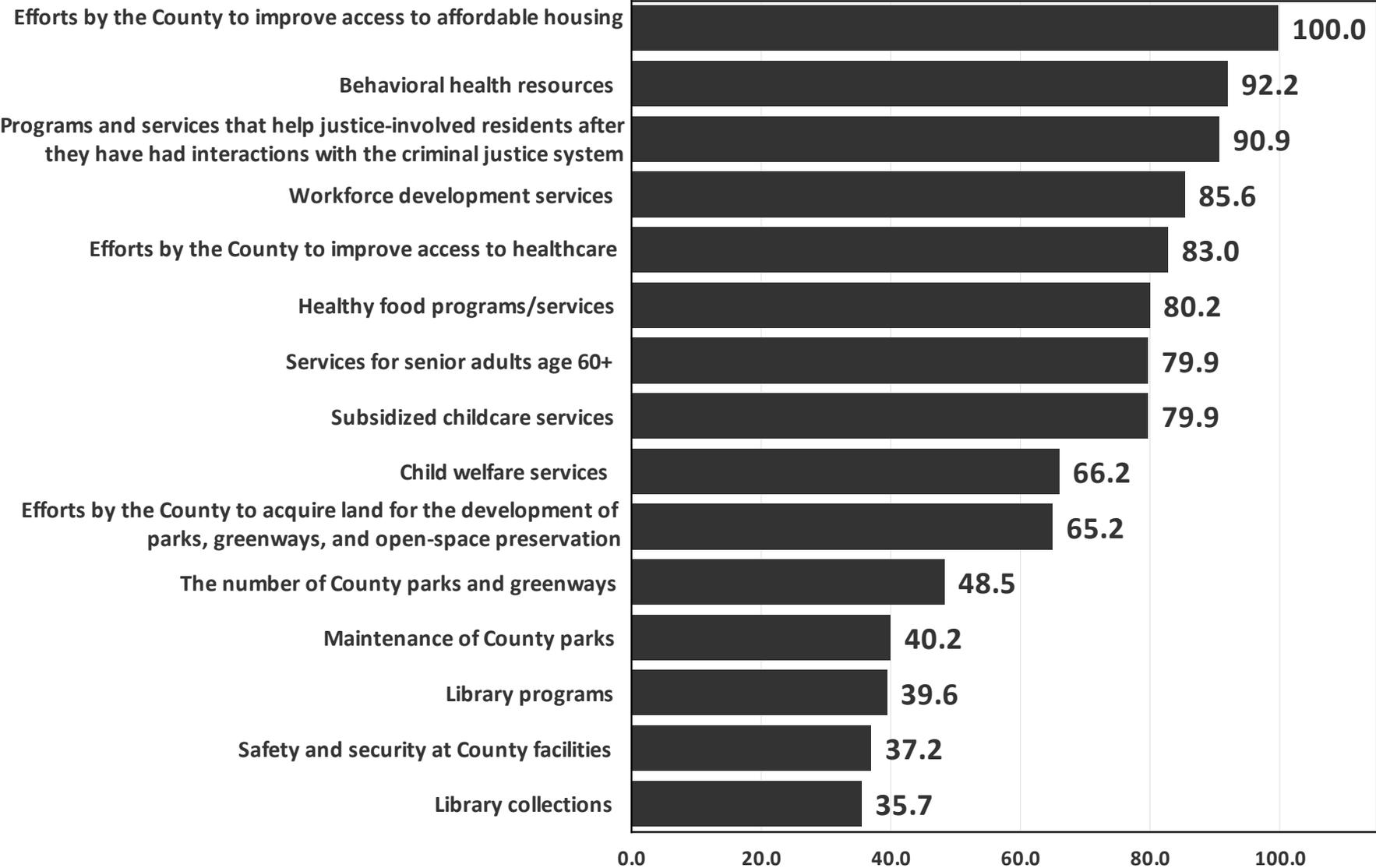
NEEDS RATING

Step 2:
Calculate the Needs Rating, which is an Index that Shows the Relative Unmet Need for Each Item Assessed to the Item with the Highest % of Needs that Are Only Partly or Not Met at All

Needs Rating for County Services, Programs, and Facilities for Residents WITH NEEDS Only

the rating for the item with the most need=100

the rating reflects the relative amount of need for each item compared to the item with the most need (excluding those with no need)



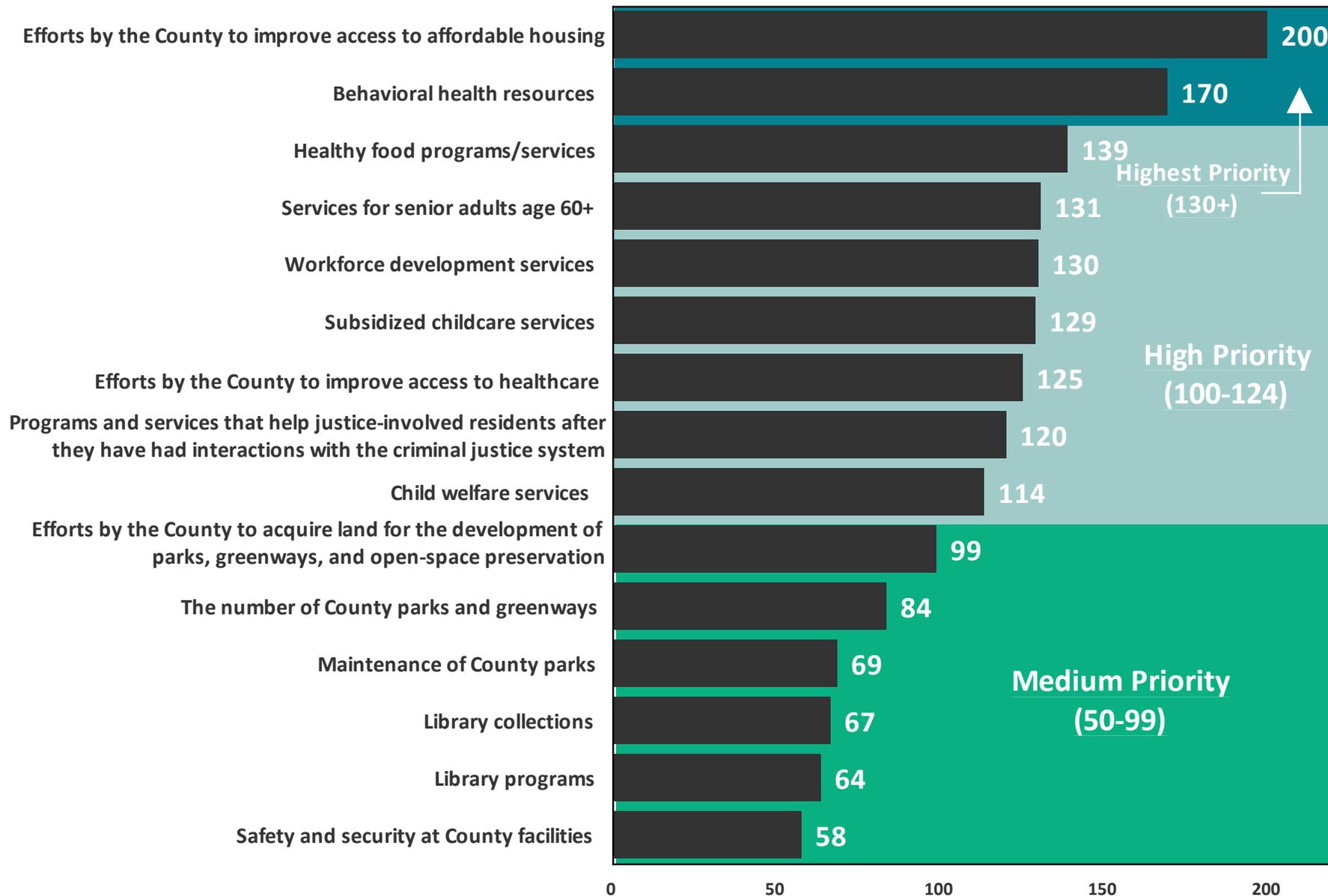


Recommendations Based on the
**PRIORITY INVESTMENT
RATING (PIR)**

The Priority Investment Rating (PIR) Is the Sum of the **NEEDS** Rating and the **IMPORTANCE** Rating. The Maximum Score Is 200

EAMPLE: Efforts by the County to Improve Access to Affordable Housing Had a NEEDS Rating of 100 among residents with needs and an IMPORTANCE Rating of 100, which resulted in a PIR of 200

Top Priorities for Investment for County Programs, Services, and Facilities Based on Priority Investment Rating for RESIDENTS WITH NEEDS ONLY



Summary

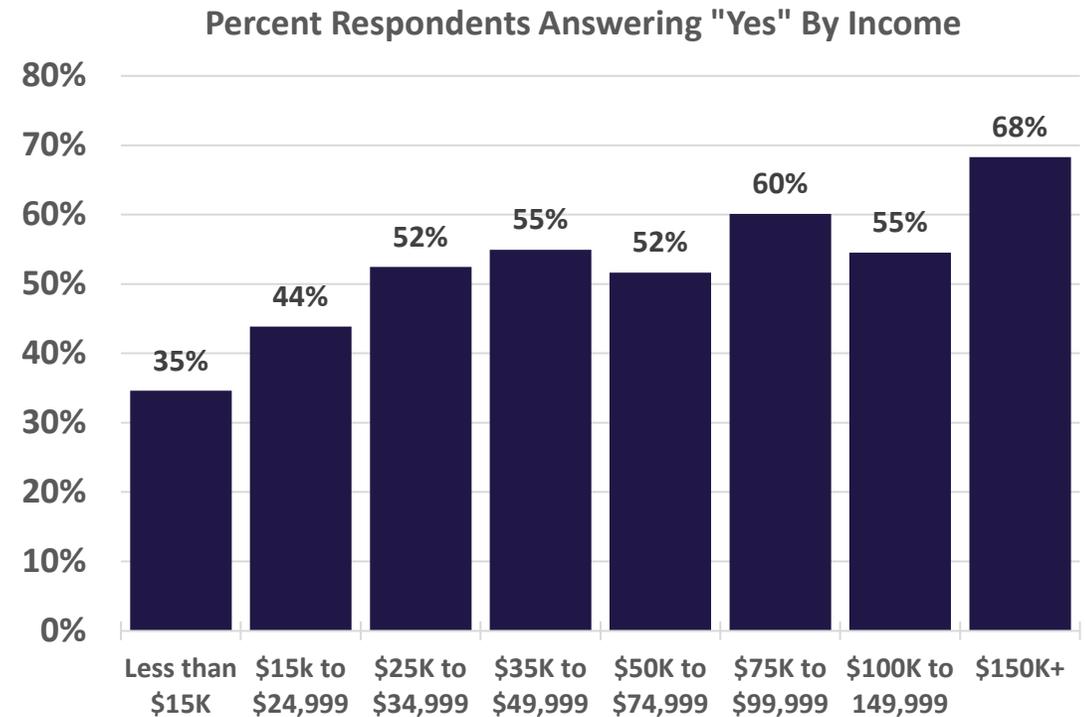
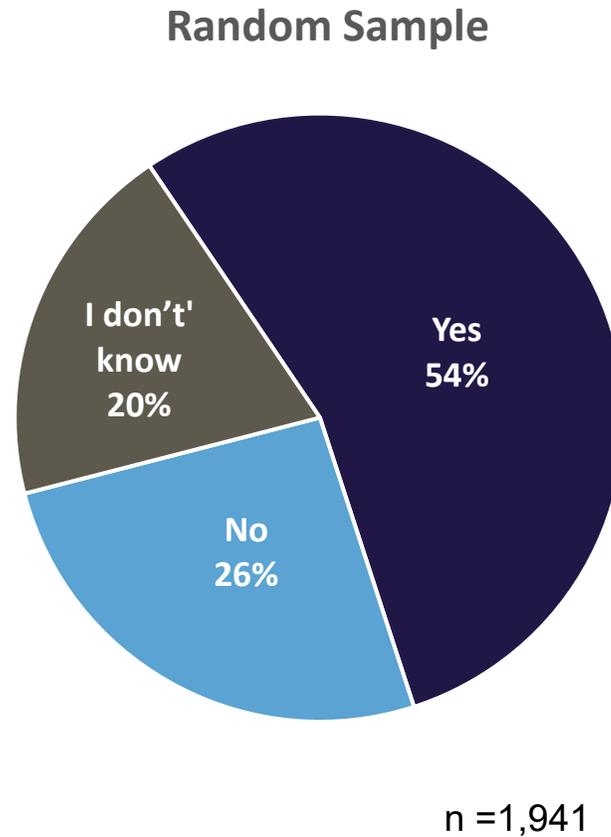
Highest Priorities for the FY2025 Budget based on the Priority Invest Rating

1. Improving access to affordable housing
2. Behavioral health resources
3. Healthy food programs/services
4. Services for senior adults age 60+
5. Workforce development services

Taxes

Would you be willing to pay a slight increase in taxes to help fund improvements in the services/program/facility you selected as your top priority

- **54%** indicated that they would be willing to pay more in taxes for their top priority
- Results vary by income, with lower income respondents less likely to respond Yes
- Based on the latest income and tax rate information, the County has the **3rd** highest per-capita income in the state, **13th** lowest percent living in poverty, and the **18th** lowest property tax rate¹



¹Per-capita income: <https://www.bea.gov/data/income-saving/personal-income-county-metro-and-other-areas>

Percent in poverty: https://www.census.gov/data-tools/demo/saipe/#/?s_state=37&s_county=&s_district=&s_geography=county&s_measures=aa

Property tax rates: <https://indd.adobe.com/view/a21302db-6dd1-4257-ab27-0edf7d337859>

Budget Engagement Targets

Survey results representative by race/ethnicity with a response rate large enough to achieve a +/- 3% margin of error and 99% confidence interval.		
Opt-in response totals will meet or exceed last year's total of 1,699		Opt-in responses totaled 3,381
Results will be available in the spring		
All survey participants who provide contact information will receive follow-up communications regarding engagement results		A communication is planned for later this year.
All Advisory Boards are provided an opportunity to provide their budget priorities to the Board of Commissioners		