

**LEWISVILLE CITY COUNCIL**  
**2025 ANNUAL CITY COUNCIL RETREAT**

**February 21, 2025**

**8:30 A.M.**

**Present:**

TJ Gilmore, Mayor

**Council Members:**

Patrick Kelly, Mayor Pro Tem  
Ronni Cade, Deputy Mayor Pro Tem  
Bob Troyer  
William Meridith  
Brandon Jones  
Kristin Green

**City Staff:**

Claire Powell, City Manager  
Gina McGrath, Deputy City Manager  
Shante Akafia, Assistant City Manager  
Jim Proce, Assistant City Manager  
Liz Plaster, City Attorney  
Lauren Crawford, Deputy City Attorney  
Jennifer Malone, Acting City Secretary

With a quorum of the Council Members present, the workshop session of the Lewisville City Council Retreat was called to order by Mayor Gilmore at 8:30 a.m. on Friday, February 21, 2025, in the Lower Level Training Room of Lewisville City Hall, 151 West Church Street, Lewisville, Texas. City Department Heads were also in attendance.

Mayor Gilmore read e-comments that were received from Ainsley Stelling and Jeff Woods.

**WORKSHOP SESSION**

**Welcome, Introductions, and Icebreaker**

**(Agenda Item A)**

City Manager Claire Powell introduced the retreat facilitator Alan Sims. Mr. Sims began with an icebreaker in which Council members were asked to share their fondest memory of public service. Mr. Sims posed the following questions to City Council members for the icebreaker scheduled for February 22, 2025: Lewisville was? Lewisville is? Lewisville will be?



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February 21, 2025**

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**City Council Discussion on the Topics Listed  
Below:**

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**(Agenda Item B)**

**2024 Accomplishments (Video)**

A video was shown highlighting the 2024 accomplishments.

**Short Term Rental Update and  
Consideration of Future Ordinance  
Revisions**

City Manager Claire Powell provided an overview of this topic.

Director of Neighborhood and Inspection Services Chris McGinn and Senior Business Analyst Dakota Buchanan gave a presentation on this topic and received questions and comments from City Council members.

**Closed Session**

*In Accordance with Texas Government Code, Subchapter D,  
Section 551.071 (Consultation with Attorney)*

Mayor Gilmore RECESSED into Closed Session at 9:55 a.m.

**Reconvene**

Mayor Gilmore RECONVENED into Workshop Session at 10:41 a.m.

No action was taken.

**Short Term Rental Update and  
Consideration of Future Ordinance  
Revisions (continued)**

City Manager Claire Powell advised that an item will be brought to the March 3, 2025 City Council meeting.

**2035 Engagement Plan and Timeline**

City Manager Claire Powell provided an overview of this topic and discussed the consultant teams that are working on this project.



Director of Planning Richard Luedke discussed what would be covered in the presentation and introduced Karen Walz with Strategic Community Solutions, who gave a history of the project.

Wendy Bonneau, with Freese and Nichols discussed the project, introduced the Freese and Nichols team and introduced Jennifer Rangel, Executive Director of Rayo Planning.

Ms. Rangel gave an overview of Rayo Planning, a non-profit company whose mission is to expand and uplift the communities voice, and introduced the Rayo Planning team.

Caitlin Admire, Freese and Nichols Project Manager, gave a presentation which focused on engagement, and received questions and comments from City Council members.

City Manager Claire Powell concluded the topic with a discussion on the big theme.

#### **Closed Session**

*In Accordance with Texas Government Code, Subchapter D,  
Section 551.071 (Consultation with Attorney)*

Mayor Gilmore RECESSED into Closed Session at 11:44 a.m.

#### **Reconvene**

Mayor Gilmore RECONVENED into Workshop Session at 11:48 p.m.

No action was taken.

#### **Water Rate Structure and Rate Changes**

City Manager Claire Powell provided an overview of this topic including water rates in relation to Castle Hills and Legacy Lewisville, sustainability, and AMI.

Director of Finance David Erb presented on the water rate update.

Director of Public Services Aaron Russell presented on cost estimation.

Mr. Erb and Chris Ekrut with NewGen Strategies and Solutions, LLC presented on capital planning and funding, and received questions and comments from City Council members.

Mayor Gilmore RECESSED the Workshop Session for a lunch break at 12:25 p.m.

Mayor Gilmore RECONVENED the Workshop Session at 12:59 p.m.



**Lake Redevelopment Project**

**Closed Session**

*In Accordance with Texas Government Code, Subchapter D,*

*Section 551.071 (Consultation with Attorney)*

Mayor Gilmore RECESSED into Closed Session at 12:59 p.m.

**Reconvene**

Mayor Gilmore RECONVENED into Workshop Session at 1:14 p.m.

No action was taken.

**Mall Progress Report and Revised Site Plan**

City Manager Claire Powell provided an overview of this topic.

Director of Economic Development Marichelle Samples gave a presentation on the history and progress. Ms. Samples introduced Michael Jang, who represents the majority owner of the mall, and Brian Moore, Director of Planning with GFF Design in Dallas.

Mr. Moore introduced Gavin Newman, specializing in urban design, master planning and multi-family development; Lance Abaya, an associate principal focusing on architectural design; and, Grant Wickard, who will focus on retail, restaurants and the results from the market study.

The representatives from GFF Design gave a presentation and received questions and comments from City Council members

**Lewisville Acquisition of Park Land Strategy  
and Key Parcel Discussion**

City Manager Claire Powell provided an overview of this topic including the 10 minute walk to a park initiative, Healthy Infrastructure Plan, Green Centerpiece Master strategy, tree canopy initiatives, sports fields studies, and how to get closest to achieving all goals.

Director of Parks and Recreation Stacie Anaya gave a presentation on the status of 10 minute walk to a park, Lewisville Acquisition of Parkland Strategy (LAPS), LISD and McDaniel properties, three priority park deserts, other 10 minute walk to a park projects and next steps, and received questions and comments from City Council members.



**Affordable Housing Comparison, Update  
and Rehab RFP**

City Manager Powell gave an overview of affordable housing and rehab projects.

Grants Coordinator Elena Shehan presented on affordable housing comparison, updates and rehab RFP on this topic and received questions and comments from City Council members.

Maureen Milligan with Grow America, presented on rehab RFP and received questions and comments from City Council members.

Mayor Gilmore RECESSED the Workshop Session for a break at 3:25 p.m.

Mayor Gilmore RECONVENED the Workshop Session at 3:40 p.m.

**Centralized Volunteer Management**

Director of Human Resources Tadd Phillips gave a presentation on centralized volunteer management, and received questions and comments from City Council members.

Chief Information Officer Chris Lee answered questions from City Council members regarding software solutions.

**CoCare Update**

City Manager Claire Powell provided an overview of the program.

Police Chief Brook Rollins and Fire Chief Mark McNeal gave a presentation on this topic that included CoCare history, authorized positions, CoCare mission, data and challenges, area comparison, and what is ahead for us in CoCare, and received questions and comments from City Council members.

Elena Shehan, Grants Coordinator, answered questions related to Denton County MHMR.

**Lewisville Forestry Progress and Future**

Director of Parks and Recreation Stacie Anaya, Environmental Preserve and Greenbelt Manager Chris Chastain, and Urban Forester Eric D'Antonio presented on this topic and received questions and comments from City Council members.

Mayor Gilmore RECESSED the Workshop Session for a break at 5:15 p.m.



Mayor Gilmore RECONVENED the Workshop Session at 5:30 p.m.

**Retiree Health Insurance**

City Manager Claire Powell provided history as to how the discussion started regarding retiree health insurance.

Director of Human Resources Tadd Phillips and Director of Finance David Erb gave a presentation on retiree health insurance and received questions and comments from City Council members.

**Closed Session**

Mayor Gilmore RECESSED into Closed Session at 9:55 a.m.

Mayor Gilmore RECESSED into Closed Session at 11:44 a.m.

Mayor Gilmore RECESSED into Closed Session at 12:59 p.m.

**Reconvene**

Mayor Gilmore RECONVENED into Workshop Session at 10:41 a.m.

Mayor Gilmore RECONVENED into Workshop Session at 11:48 p.m.

Mayor Gilmore RECONVENED into Workshop Session at 1:14 p.m.

**Adjournment**

Mayor Gilmore adjourned the meeting of the Lewisville City Council at 6:22 p.m. on Friday, February 21, 2025.

These minutes approved by the Lewisville City Council on the 7<sup>th</sup> of April, 2025.

APPROVED

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TJ Gilmore  
MAYOR



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ATTEST:

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Jennifer Malone  
ACTING CITY SECRETARY

DRAFT MINUTES





LEWISVILLE  
1925 ★ TEXAS ★ 2025

# LEWISVILLE CITY COUNCIL RETREAT

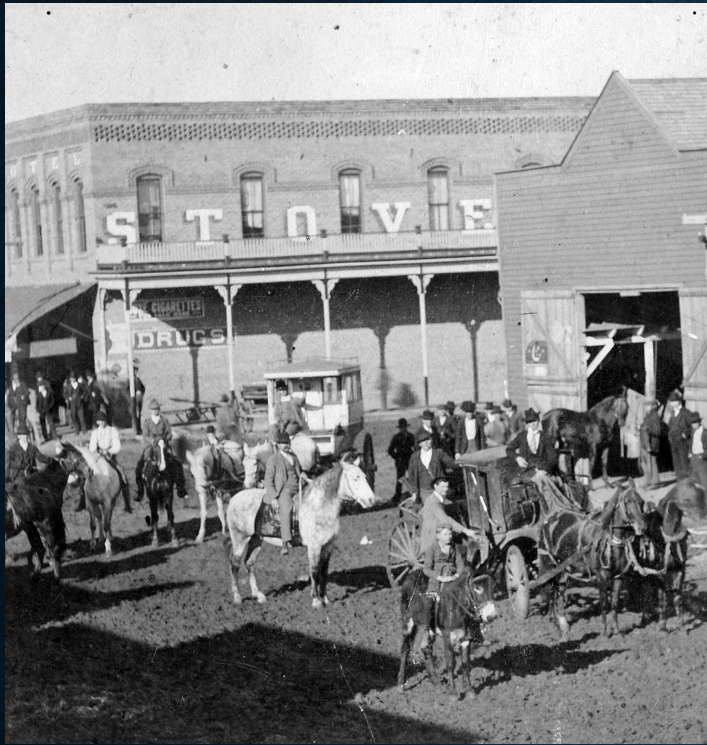
FEBRUARY 21-22, 2025



# **WELCOME AND INTRODUCTIONS**

Friday, February 21, 2025





# LEWISVILLE IDENTITY – PAST, PRESENT, AND FUTURE

The **PAST** is kind enough to give  
you lessons

The **PRESENT** is kind enough to  
give you opportunities

The **FUTURE** is kind enough to  
give you both





# **DAY 1**

# **ICEBREAKER**



# 2024 ACCOMPLISHMENTS



(video link)





# Short Term Rental Update and Consideration of Future Ordinance Revisions



City Council Retreat 2-21-2025



# Discussion overview

- Update on interim prohibition and enforcement
- Review currently permitted STRs and their corresponding zoning districts
- Discuss survey cities density and zoning regulations
- Test different density regulations to Lewisville examples
- Discuss policy considerations and public engagement
- Next steps and council direction





# Lewisville City Council Action on Short-Term Rentals (STRs)

## Key Milestone

- **Council Action:** Approved a one-year interim prohibition on establishing new short-term rental units.
- **Adopted On:** February 29, 2024.
- **Effective Date:** March 4, 2024.
- **Scope:**
  - Applies only to STRs established after March 4, 2024.
  - Existing STRs operating before this date may continue under non-conforming use status.
  - Non-conforming uses include those with investment-backed expectations, as of January 8, 2024.
- **Expiration:** March 4, 2025.



# Enforcement outcomes for interim prohibition on STRs

Lewisville City Code Section VII.2.1.5 of the Unified Development Code governs the interim prohibition. Staff conduct monthly reviews of STR reports.

**37**

Total properties  
found violating  
the interim  
prohibition

**6**

Properties  
approved as non-  
conforming use  
or proved  
already  
operating

**23**

Properties  
removed listing  
or switched to  
long-term rental

**8**

Properties with  
enforcement  
action still  
ongoing





# Permitted STRs and density regulations





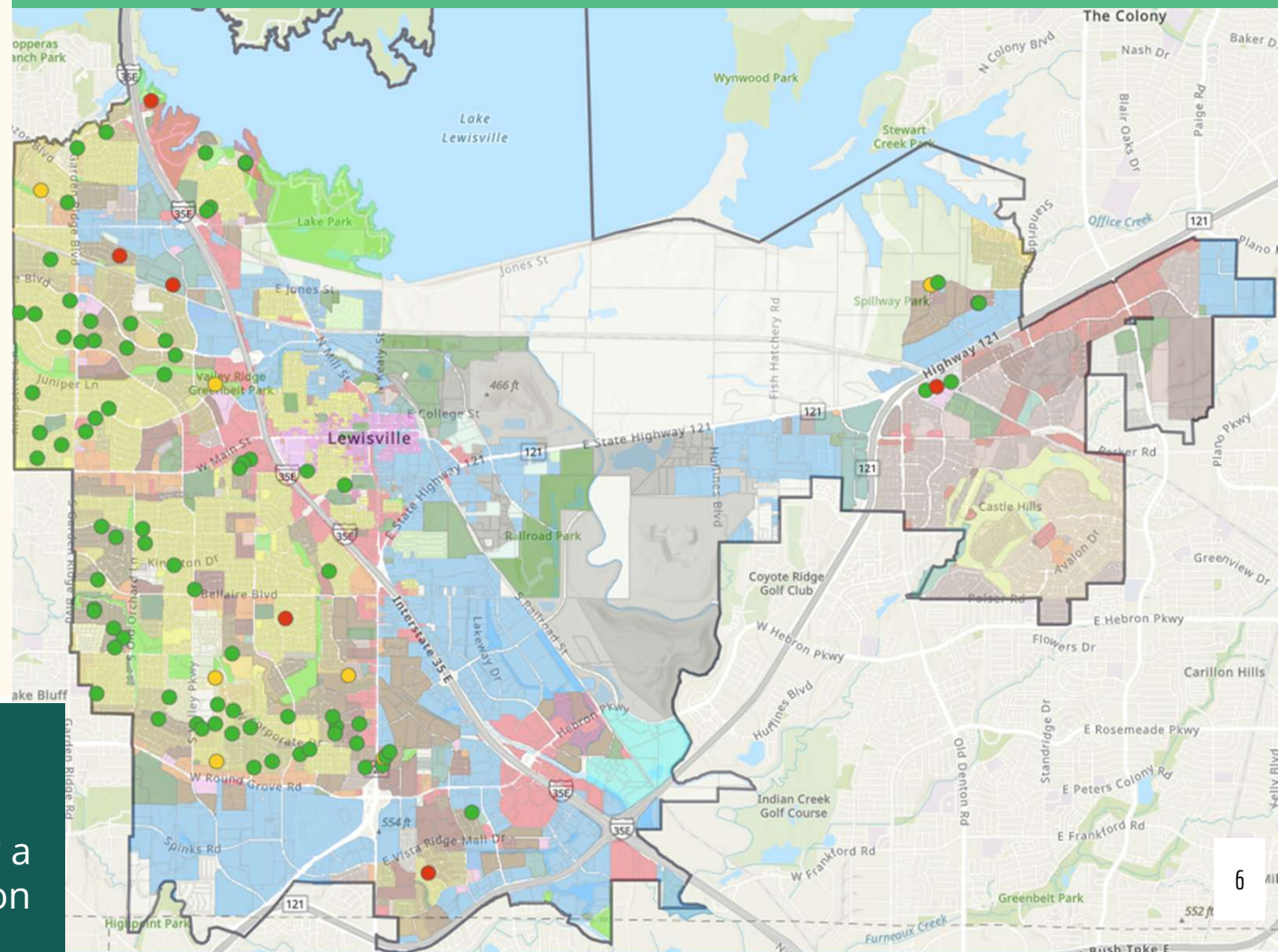
# Map of identified STRs and zoning districts

Zoning_Class	
AO - Agricultural Open Space	PK - Parking
CP - City Park	PU - Public Use
DU - Duplex	PUD - Planned Unit Development
ETH - Estate Townhouse	R12 - Single Family Residential 12,000 Sq.Ft.
ETJ - Extra Territorial Jurisdiction	R18 - Single Family Residential 18,000 Sq.Ft.
GB - General Business	R5(PH) - Single Family Residential 5,000 Sq.Ft.
GB2 - General Business 2	R6 - Single Family Residential 6,000 Sq.Ft.
HI - Heavy Industrial	R7.5 - Single Family Residential 7,500 Sq.Ft.
LC - Local Commercial	R9 - Single Family Residential 9,000 Sq.Ft.
LI - Light Industrial	SU - Specific Use
MD - Medical District	TE - Single Family Towne Estate
MF1 - Multi-Family 1	TH - Townhouse
MF2 - Multi-Family 2	TH2 - Townhouse 2
MF3 - Multi-Family 3	WH - Warehouse
MHP - Mobile Home Park	PD
MHS - Mobile Home Subdivision	
MU	
MU30 - Mixed Use Thirty District	
MU90 - Mixed Use Ninety District	
MUSC - Mixed Use Shopping Center District	
OD - Office District	
OTC - Old Town Center Business	
OTCO - Old Town Center	
OTMU1 - Old Town Mixed Use 1	
OTMU2 - Old Town Mixed Use 2	
PD-MU	

## Short Term Rental Locations

- PERMITTED
- IN PROGRESS
- NOT PERMITTED

90 STRs total  
**93%**  
 have a permit or a  
 permit application

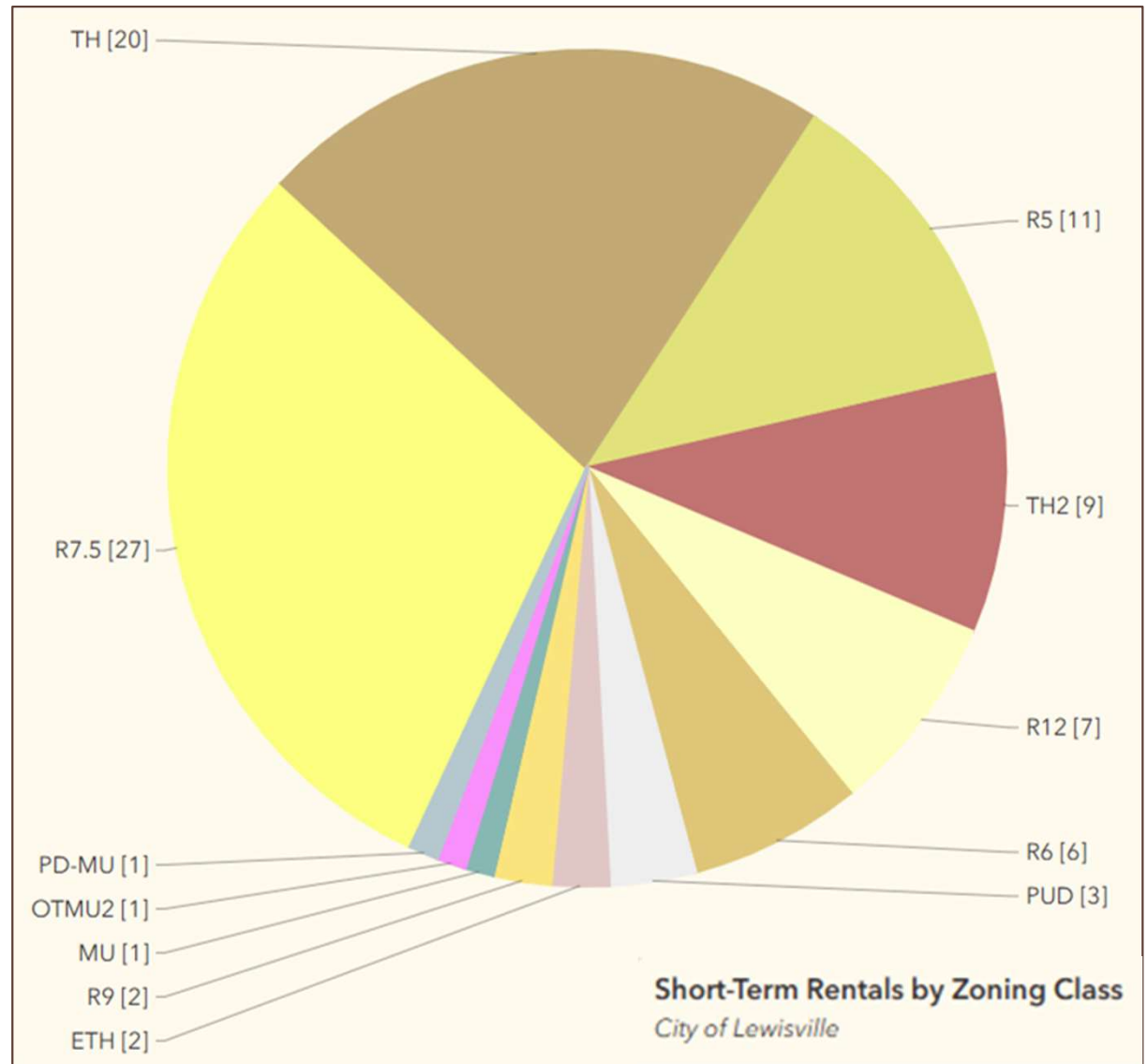




# Data Insights: STRs by zoning district

Lewisville STRs are located in 12 different zoning districts.

- 87 STRs in residential zones
- 3 STRs in mixed-use zones
- 0 STRs in commercial zones





# Characteristics and data insights in single-family zones

## Characteristics:

- Lower density.
- Emphasis on preserving neighborhood character.
- Existing HOA could be prohibiting STRs. Residential homes within the Castle Hills HOA are prohibited from operating as an STR.

## Regulations Impacting STRs:

- Notifying property owner.
- STRs often face stricter compliance requirements to align with neighborhood goals based on the current ordinance requirements



**Single-family homes,**  
attached and detached

77 STRs permitted

26 STRs violated the  
interim prohibition



# Characteristics and data insights in multi-family zones

## Characteristics:

- Higher density.
- Typically more permissive for transient accommodations

## Regulations Impacting STRs:

- Notifying the responsible party can be complex.
- May include limits on percentage of units in a complex operating as STRs.
- 0 permitted, most likely because Lewisville City Code states, “An owner shall obtain a short-term rental unit permit.”



### Multi-family units

0 STRs permitted  
1 identified

(citations issued to obtain compliance)

11 STRs violated the  
interim prohibition



# Preserving Neighborhood Character

- **Challenge:** High concentrations of STRs in specific neighborhoods can disrupt the community fabric, leading to concerns about noise, parking, safety, and quality of life.
- **Example:** Single-family neighborhoods often resist to STRs due to fears of transient populations and reduced neighborly interactions.
- **Current STR regulations:**
  - Allow city to revoke STR permit if the owner receives more than two citations for violation of City Code within the permit year.
  - Require STRs to notify guests of regulations for parking, trash collection and noise.

## Parking Regulations

- Unlawful to park within 10 feet of a mailbox between 9 a.m. and 5 p.m. on regular mail delivery days (Lewisville City Code Sec. 15-128)
- Unlawful to park or store any bus, recreational vehicle, trailer or semi-trailer on a public street, unless temporarily parking for loading or unloading. Recreational vehicles loading and unloading cannot exceed 4 hours. A bus, trailer, or semi-trailer loading or unloading cannot exceed 20 minutes (Lewisville City Code Sec. 15-133)
- No part of a special vehicle or recreational vehicle may extend over a public right-of-way (Lewisville City Code Sec. 15-134)
- Vehicles should be parked on an improved surface (Lewisville City Code Sec. 15-134)
- Cannot park in any alley, except when necessary to avoid conflict with other traffic or in compliance with directions of a police officer (Lewisville City Code Sec. 15-135)
- Cannot park in a limited parking zone without a displaying valid permit (Lewisville City Code Sec. 15-139)

## Noise Prohibited

- Unlawful to allow, make or cause any excessive or unnecessary noise that is clearly audible within 100 feet of the noise source (Lewisville City Code Sec. 9-5)
- In single-family homes, sound from a loudspeaker, television, radio, musical instrument, or sound amplifying equipment cannot be clearly audible and measure more than 65 dBA on the A-weighting scale (Lewisville City Code Sec. 9-5)
- In multi-family dwellings, sound from a loudspeaker, television, radio, musical instrument, or sound amplifying equipment cannot be clearly audible and measure more than 65 dBA on the A-weighting scale during daytime, and cannot be audible within other units at nighttime (Lewisville City Code Sec. 9-5)

## Trash Collection

- All solid waste and recyclable materials shall be placed at the designated collection area by 7 a.m. on the day of collection (Lewisville City Code Sec. 12-23)
- Collection containers cannot be set out more than 24 hours before or after collection time. For example, if your trash collection is on Wednesday at 7 a.m., then the trash container can only be set out from Tuesday at 7 a.m. to Thursday at 7 a.m. (Lewisville City Code Sec. 12-23)
- Trash must be in acceptable containers and placed in such a way as to prevent littering or spilling of materials (Lewisville City Code Sec. 12-24)
- Solid waste and recycling containers should be placed at the edge of the street or alleyway without endangering or interfering with vehicular or pedestrian traffic and line of sight (Lewisville City Code Sec. 12-24)
- A person commits an offense if they damage any solid waste or recycling container owned by the city (Lewisville City Code Sec. 12-24)



Strategies  
cities  
employ to  
address  
these issues

**Permit Quotas**

Requiring STR operators to obtain permits and capping the number issued per zone



**Community Engagement**

Soliciting feedback from residents and stakeholders to craft fair and balanced policies.



**Geographic Restrictions**

Prohibiting STRs in certain zones or restricting them to commercial or mixed-use areas.



**Caps on STR Density**

Limiting the percentage of housing units in a neighborhood or building that can operate as STRs.



**Monitoring and Enforcement Tools**

Using technology to track STR listings and ensure compliance with density regulations.





# Survey Cities with STR density and zoning regulations

In January 2024, staff reviewed the code of ordinances for any city in Texas with a population greater than 20,000. Out of 146 cities, 77 had STR regulations, 30 of which had density- or zoning-based rules. Our typical survey cities are highlighted.

- |                   |                    |                 |
|-------------------|--------------------|-----------------|
| 1. Arlington      | 11. Duncanville    | 21. Plano       |
| 2. Austin         | 12. Euless         | 22. Port Arthur |
| 3. Belton         | 13. Fort Worth     | 23. Portland    |
| 4. Boerne         | 14. Galveston      | 24. Rockwall    |
| 5. Celina         | 15. Grapevine      | 25. San Angelo  |
| 6. Copperas Cove  | 16. Harker Heights | 26. San Antonio |
| 7. Corpus Christi | 17. Kerrville      | 27. San Marcos  |
| 8. Dallas         | 18. Lufkin         | 28. Sugar Land  |
| 9. Denton         | 19. Murphy         | 29. Waco        |
| 10. Dickinson     | 20. New Braunfels  | 30. Waxahachie  |



# Types of Density and Zoning Regulations



## Minimum distance

- between lots, ranging from 100 to 1000 feet
- from properties zoned in single-family use (Grapevine only)
- from an elementary or secondary school (San Angelo only)



## Maximum number or percentage

- on a block or block face, 12.5% or 15%, at least 1
- in multi-family building or multi-family development
- on a single lot, property or parcel
- per zoning district (Denton only)
- in the entire city



## Allowed or prohibited in

- specific zones, generally either residential or commercial
- overlay districts
- designated STR zone (Arlington only)



# General exceptions to density and zoning requirements

Surveyed cities may allow an STR that does not meet their density or zoning rules if the STR,

- Existed prior to adoption of regulations (must provide proof of operations or register by a specific deadline).
- Is occupied by the owner or operator.
- Is within a special zoning district.
- Approval of a special use permit (SUP).





# Example cities: Arlington & New Braunfels

## Arlington

- STRs are allowed in new or existing residential structures in residential- medium density (RM-12), residential- multi-family (RM-22) zones, and within the established STR Zone, which is anchored by their Entertainment District and extends approximately one mile from its center.
- STRs are allowed in existing residential structures in all non-residential and all mixed-use zoning districts

## New Braunfels

- STRs within residential districts is prohibited.
- STRs are prohibited in any floodway located within the city limits, regardless of zone.
- In addition to the STR permit, a special use permit is required in all zoning districts except resort commercial district (C-4), resort commercial district (C-4A) and resort facilities district (C-4B), where a short term rental is proposed in a single-family dwelling or a duplex only



# Example cities: Denton & Plano

## Denton

- In residential zoning districts, max of 2 STRs per parcel, a 100-foot minimum distance measured at the property boundary, and a maximum of 1000 certificates issued per year.
- In multi-family developments, no more than 10% of units, but at least 2 units, can be an STR.
- STR use is prohibited in Light Industrial (LI), Heavy Industrial (HI) and Public Facilities (PF) zones.

## Plano

- New STRs are prohibited in residential zoning districts unless located within a Heritage Resource Overlay District. STRs in Heritage districts must have live-in management when the base zoning is a single- or two-family district.
- New STRs are permitted in legal dwellings in nonresidential zoning districts, except neighborhood office zone (O-1). Planned Development (PD) districts may affect these rights.
- New STRs may be permitted in apartments in residential zoning districts if the building or complex includes on-site property management. Up to one unit or 5% of the total units on the property, whichever is greater, may be STRs.
- A backyard cottage and main dwelling unit cannot be rented as two separate STRs.

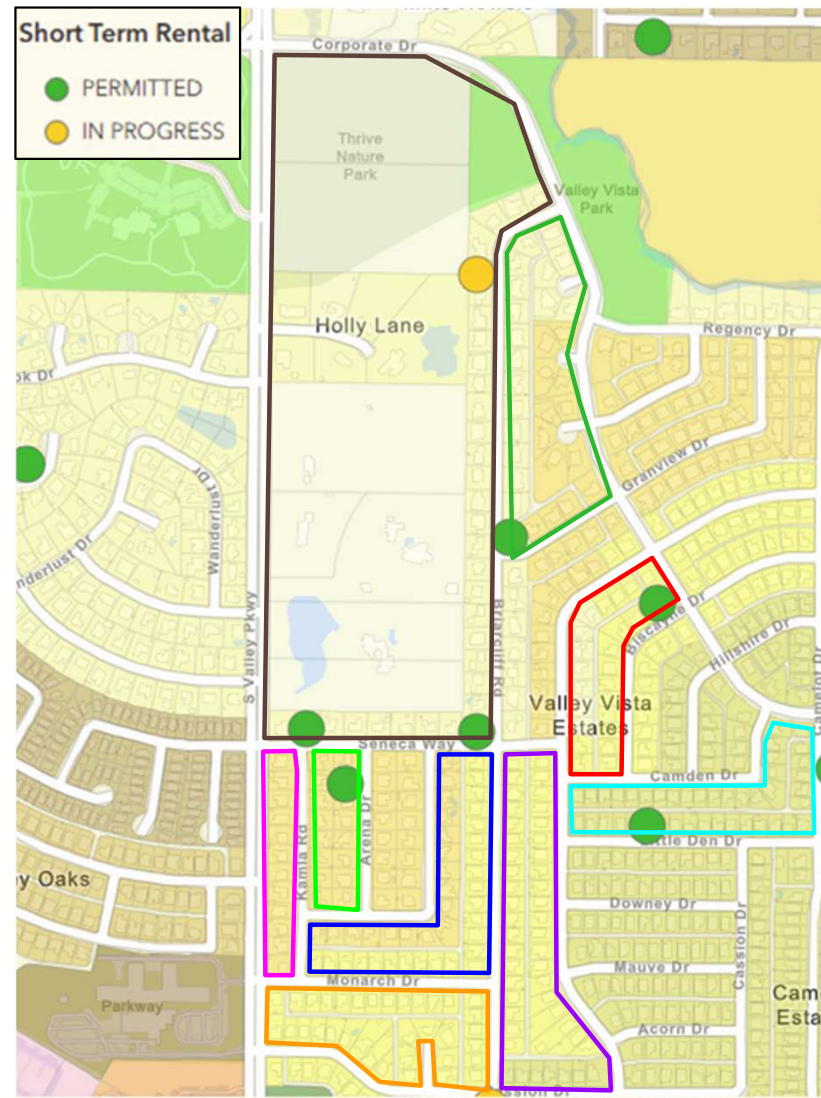


# Lewisville example per block

Eules and San Marcos limit per block.

Lewisville's Unified Development Code (UDC) Section II.2.1 defines a block as,

*An area of land bounded by public or private streets or private vehicular routes, or by a combination of public or private streets and public parks, cemeteries, railroad rights-of-way, highways, streams, or corporate boundary lines of the City. There may be more than one (1) lettered or numbered block as shown on a plat falling within a single block as herein defined.*



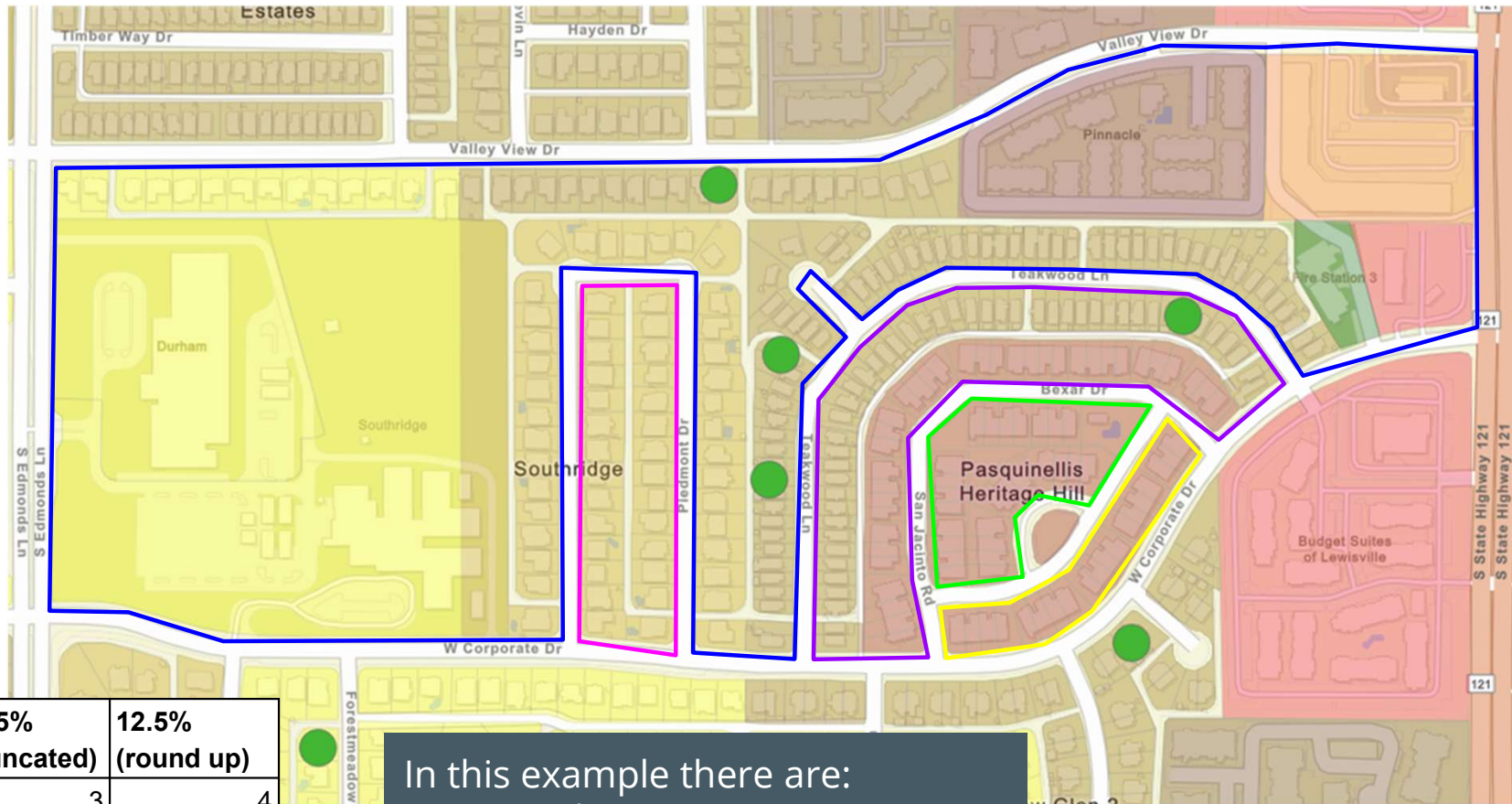
Block Color	SF Units	Permitted STRs	12.5% (truncated)	12.5% (round up)
Brown	39	3	4	5
Pink	12	0	1	2
Light Green	16	1	2	2
Dark Blue	41	0	5	5
Orange	34	0	4	4
Purple	46	0	5	6
Red	25	1	3	3
Light Blue	42	1	5	5
Dark Green	31	1	3	4
<b>Totals</b>	<b>286</b>	<b>7</b>	<b>32</b>	<b>36</b>

In this example there are:

- 286 homes
- 9 blocks
- 7 permitted STRs
- 32 STRs allowed (truncated)
- 36 STRs allowed (round up)



# Lewisville example 2: per block



Block Color	SF Units	Permitted STRs	12.5% (truncated)	12.5% (round up)
Pink	28	0	3	4
Purple	82	1	10	10
Green	26	0	3	3
Yellow	19	0	2	2
Blue	132	3	16	17
<b>Totals</b>	<b>287</b>	<b>4</b>	<b>34</b>	<b>36</b>

In this example there are:

- 287 homes
- 4 permitted STRs
- 5 blocks
- 34 STRs allowed (truncated)
- 36 STRs allowed (round up)



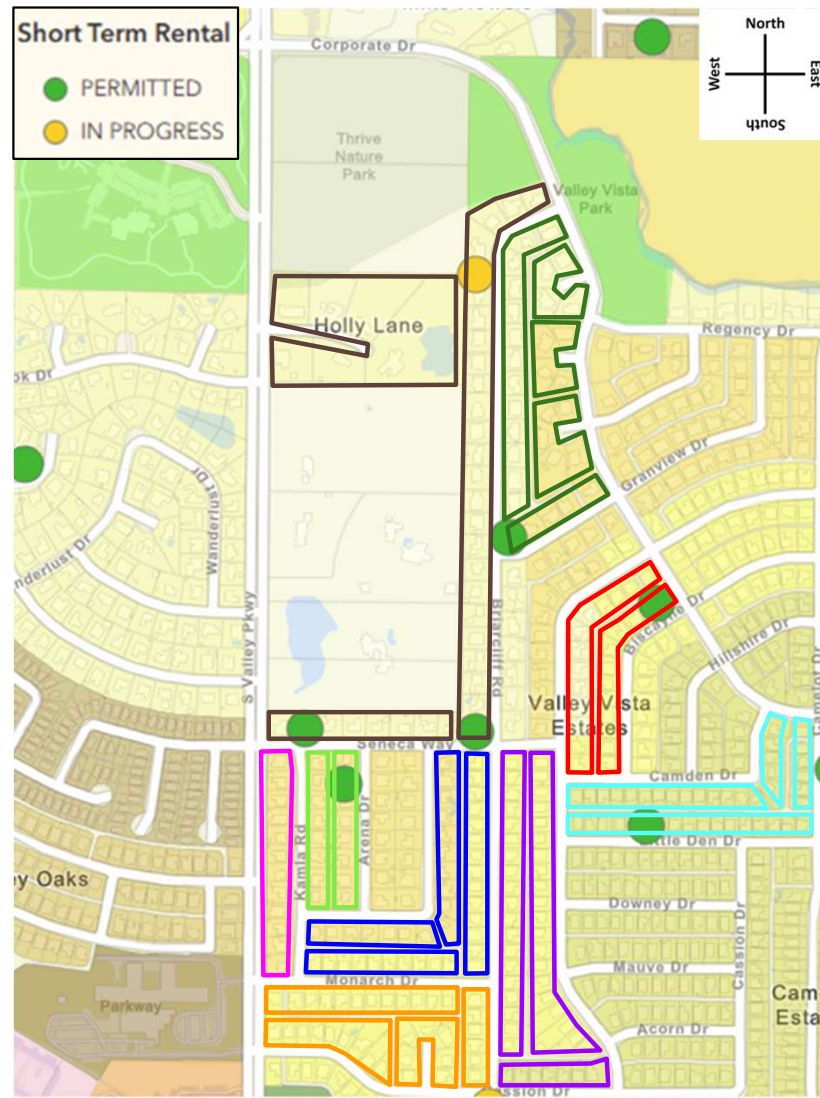
# Lewisville example per block face

Corpus Christi and San Antonio  
limit per block face.

Lewisville's UDC does not  
currently define a block face.

Corpus Christi defines a block  
face as,

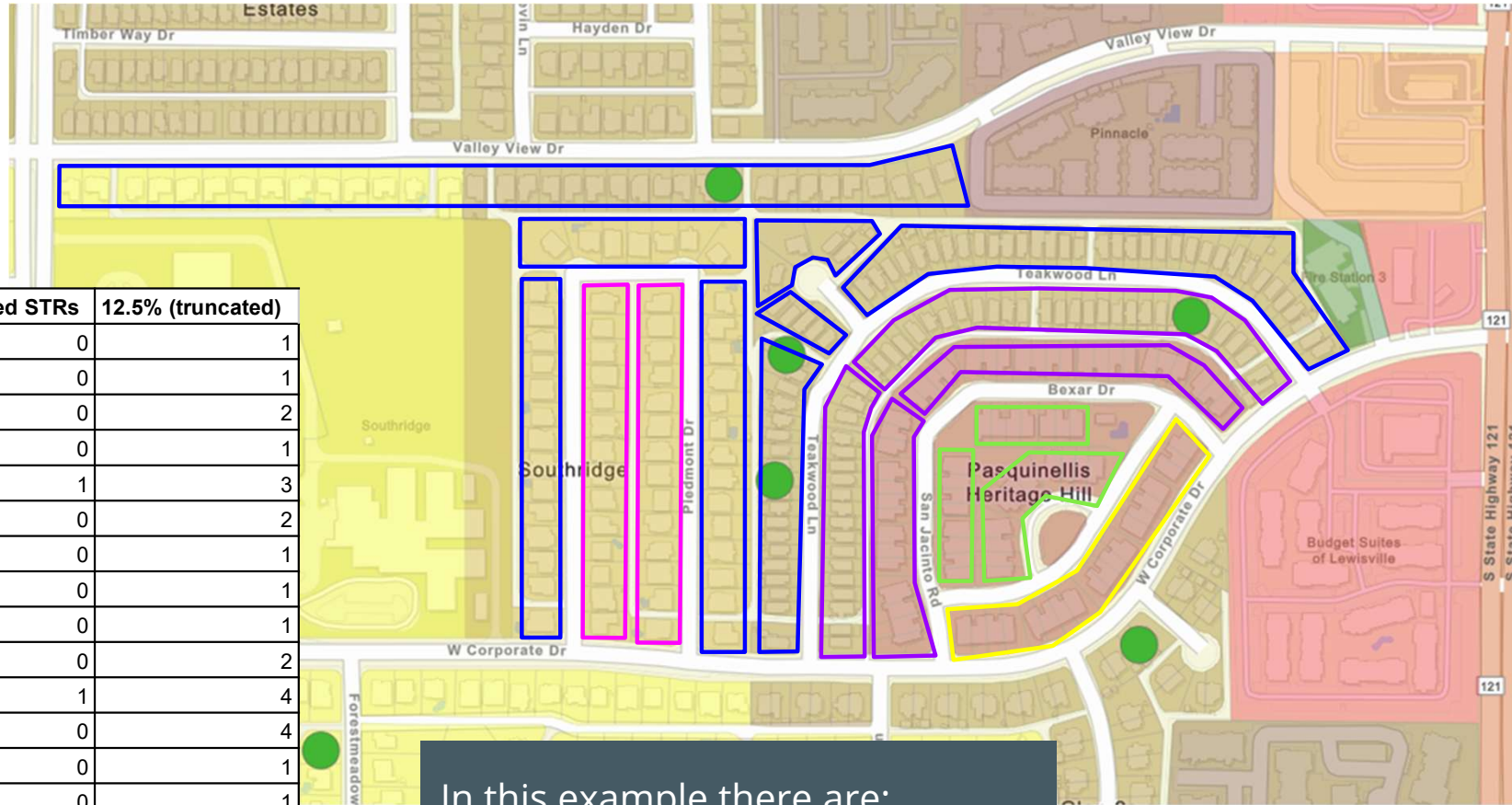
*properties abutting one (1) side of  
a street and lying between the two  
(2) nearest intersecting or  
intercepting streets, or nearest  
intersection or intercepting street  
and/or railroad right-of-way,  
unsubdivided by land,  
watercourse, or city boundary*



Block Face Color	SF Units	Permitted STRs	12.5% (truncated)
Brown South	8	1	1
Brown East	25	2	3
Brown cul-de-sac	6	0	1
Pink East	12	0	1
Light Green East	8	1	1
Light Green West	8	0	1
Dark Blue North	7	0	1
Dark Blue West	10	0	1
Dark Blue East	14	0	1
Dark Blue South	10	0	1
Orange North	12	0	1
Orange East	6	0	1
Orange cul-de-sac	7	0	1
Orange South	9	0	1
Purple West	19	0	2
Purple South	7	0	1
Purple East	20	0	2
Light Blue North	14	0	1
Light Blue West	5	0	1
Light Blue East	6	0	1
Light Blue South	17	1	2
Red West	13	0	1
Red East	12	1	1
Dark Green South	5	1	1
Dark Green E bottom	5	0	1
Dark Green E middle	4	0	1
Dark Green E top	4	0	1
Dark Green West	13	0	1
<b>Total</b>	<b>286</b>	<b>7</b>	<b>33</b>



## Lewisville example 2: per block face



Block Color	SF Units	Permitted STRs	12.5% (truncated)
Pink West	14	0	1
Pink East	14	0	1
Purple West	18	0	2
Purple East	14	0	1
Purple North	29	1	3
Purple South	21	0	2
Green West	8	0	1
Green North	7	0	1
Green SE	11	0	1
Yellow	19	0	2
Blue Valley	35	1	4
Blue Teakwood Ln	34	0	4
Blue cul-de-sac	4	0	1
Blue	5	0	1
Blue Teakwood Ln	19	2	2
Blue Piedmont	14	0	1
Blue Preston	7	0	1
Blue Caitlin	14	0	1
<b>Total</b>	<b>287</b>	<b>4</b>	<b>30</b>

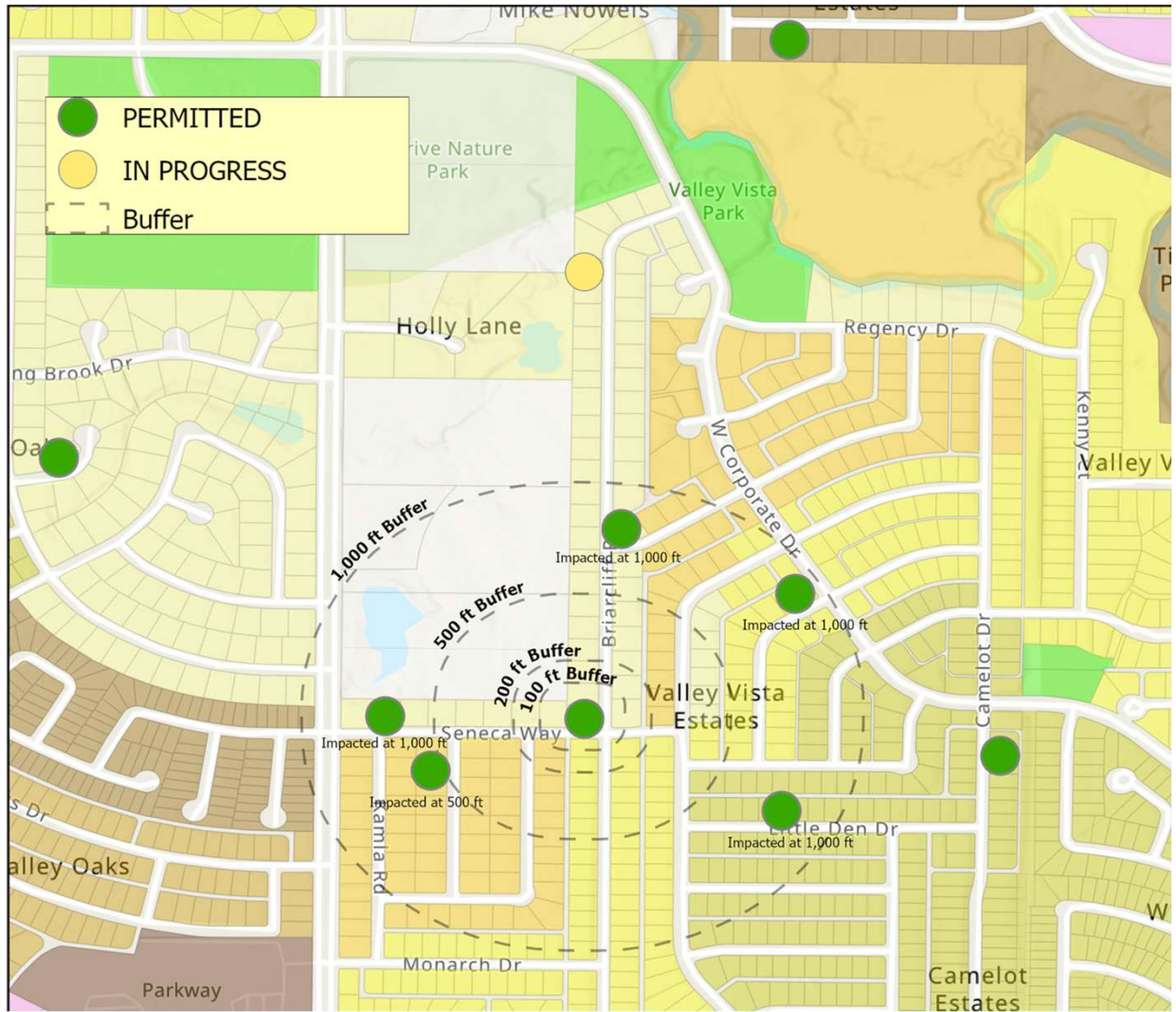
In this example there are:

- 287 houses
- 4 permitted STRs
- 18 block faces
- 30 STRs allowed (truncated)



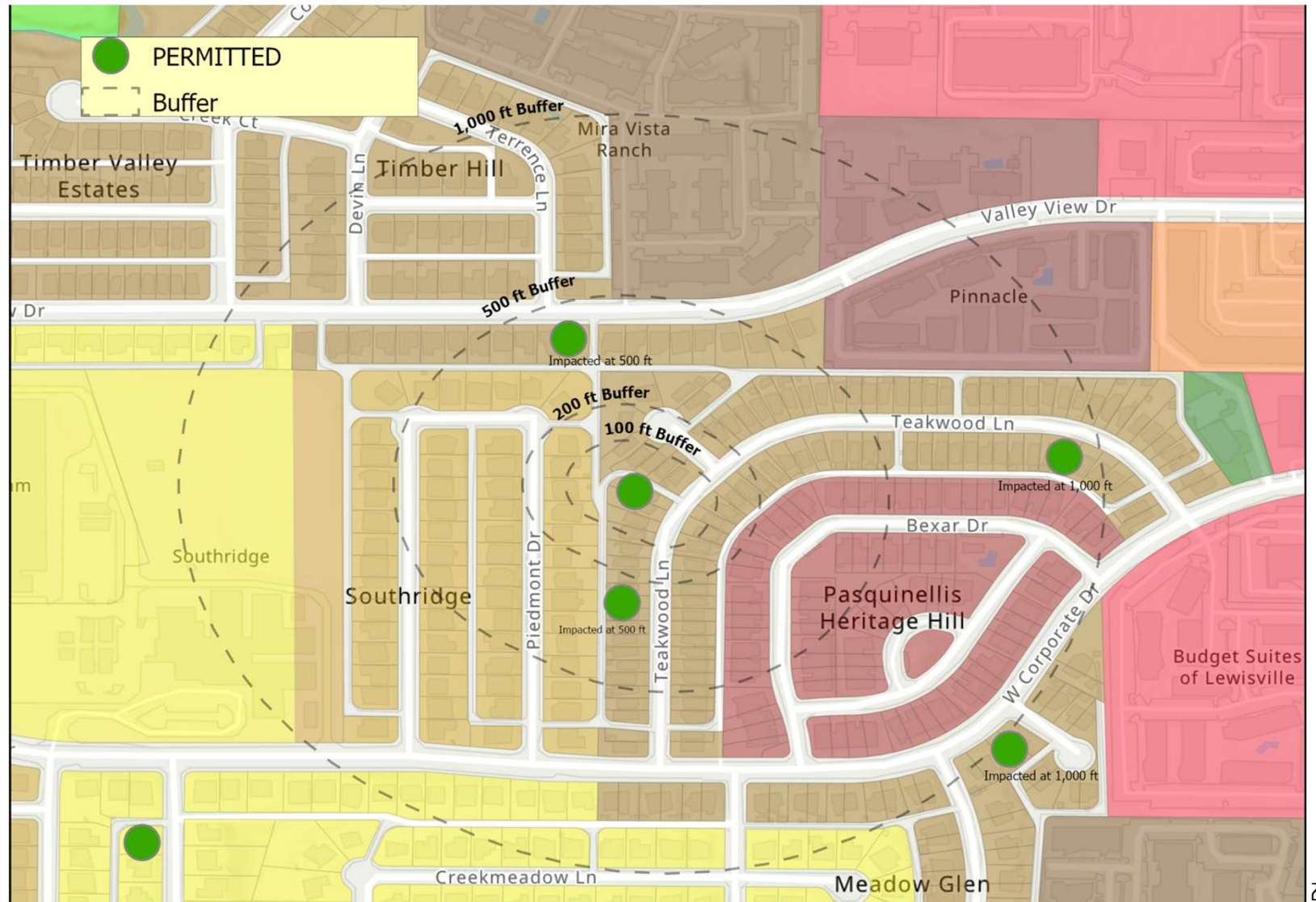
# Lewisville example minimum distance

City	Distance	Measured
Austin	1000 ft	From the lot
Belton	500 ft	From nearest property line
Boerne	200 ft	On the same block face, from property line
Denton	100 ft	At the property boundary
Harker Heights	500 ft	From the lot
Rockwall	1000 ft	<i>Not specified</i>
San Angelo	500 ft	From the lot
San Marcos	660 ft	On the same street, or 1 per block, whichever is more limiting
Waco	500 ft	<i>Not specified</i>





# Lewisville example 2: Minimum distance





# Challenges Facing STR Density Requirements

## Data and Monitoring Gaps

- STR platforms may not share comprehensive data, complicating enforcement and planning efforts. Some STR listings are deemed unidentifiable.

## Enforcing Density Limits

- Determining an appropriate density or zoning regulations is complex and varies by area. Some complexities include how to address block with both single and multi-family units, rules for rounding max percentages, and disputes on property lines when measuring minimum distance.
- Enforcement often requires extensive monitoring. The resources needed depends on the complexity of the regulations. Code Enforcement staff may need to develop administrative tools to easily determine if an STR is allowed to continue, properties applying at the same time, waitlists, permit abandonment, and other issues.



# Community engagement

Both Denton and Plano conducted an online survey with questions about density and zoning regulations, open to the public for one month.

## Denton:

- Held two town hall meetings in August 2023, one in-person and one virtually.
- Sent postcards to homes within the affected zoning districts.
- Proposed changes were reviewed by the Development Code Review Committee from September 2023 to January 2024.

## Plano:

- Contracted with a third-party to support public outreach
- Created a Short-term Rental Task Force, made up of 22 residents appointed by City Council. They met 6 times from June 2023 to February 2024.
- Held two public open houses, hosted both in-person and online, in August 2023 and February 2024.



Created using AI



Created using AI



# Council Direction



**DIRECTION 1:** DO YOU WANT STAFF TO RESEARCH, COLLECT PUBLIC INPUT, AND BRING DENSITY REGULATIONS BACK FOR CONSIDERATION?



**DIRECTION 2:** WHAT TYPE OF DENSITY REGULATION DO YOU PREFER?



**DIRECTION 3:** DO YOU WANT TO LIMIT THE NUMBER OF STR PERMITS THAT STAFF CAN ISSUE WHILE WE RESEARCH AND COLLECT PUBLIC INPUT ON DENSITY REGULATIONS? IF SO, STAFF WOULD RECOMMEND ALLOWING AT LEAST 90 STR PERMITS CITY-WIDE.



# LEWISVILLE VISION 2035

## VISION PLAN UPDATE

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February 21, 2025 | Council Retreat





# AGENDA

1

Project Overview

2

Project Initiation

3

Project Work Phases

4

Sustainability & Resilience

5

Closing Remarks & Questions





# PROJECT OVERVIEW



# City Team



CLAIRE POWELL



BRIAN HOLMAN



GINA MCGRATH



SHANTE AKAFIA



JAMES PROCE



STACIA ANAYA



CAROLYN BOOKER



BROOK ROLLINS



DAVE ERB



JAMES KUNKE



CHRIS LEE



JEREMY LEONARD



RICHARD LUEDKE



CHRIS MCGINN



MARK MCNEAL



TADD PHILLIPS



AARON RUSSELL



MARICHELE SAMPLES



DAVID SALMON



Karen Walz  
Strategic Community  
Solutions





# Consultant Team



Wendy Bonneau  
Principal-in-Charge



Caitlin Admire  
Project Manager



Karen Chavez  
Project Planner



Wilson Kerr  
Project Planner



David Jones  
Project Planner



Connor Roberts  
Project Planner





# Consultant Team



Jennifer Rangel  
Executive Director



Laura Quintero Chávez  
Senior Planner



Gerardo "Jerry" Figueroa  
Neighborhood Leader Advisor







# Overall Outreach Objectives

## Convenient

Hold events at convenient times and locations, attend existing community events and utilize a project website.

## Inclusive

Ensure inclusive spaces, use accessible language and remove participation barriers.

## Interactive

Use engaging activities such as small group discussions and interactive games to promote learning and collaboration.

## Meaningful

Intentionally collect useful feedback and show its impact on the Plan to emphasize community ownership.



# Engagement Toolbox





# Neighborhood Outreach

## Community Touchpoint Campaign

Intercept Surveys  
Tabling at community events  
Youth Engagement  
The Vision Bus (mobile engagement)  
“Guerrilla” Engagement  
Establish Vision 2035 HQ

## Grassroots Engagement (Led by Rayo Planning)

Targeted outreach to five Census Tracts with a predominant Latine/Hispanic population

## Community Ambassadors (75-100 community members)

Engage and grow the City’s current ambassadors program.



# Committees and Sub-committees

## **Vision 2035 Steering Committee**

↳ Broad community  
invitation for applicants  
  
2-3 Full Committee  
Meetings

## **Sub-Committees**

↳ Sub-committee based on  
focus areas, Big Ideas/Moves,  
or otherwise as applicable  
  
Will be involved in  
neighborhood outreach  
activities and public  
workshops  
  
Will meet to explore, direct  
and confirm strategies and  
recommendations

## **Assistant City Managers/City Staff**

↳ ACMs and appropriate  
City staff will work with  
sub committees to guide  
and support their efforts  
as well as be involved in  
the community outreach





# Preliminary Project Phasing







# PROJECT INITIATION



# Work Phase 1 / Project Initiation



Work Phase #1  
**Project Initiation**  
– 2 months –

## – Overview –

- Establish roles, expectations and protocols
- Confirm the project work plan and schedule
- Gather data and information
- Create preliminary deliverables and document outline
- Establish document branding and template
- Finalize Public Involvement Plan (PIP) & preparations for PIP execution

## – Deliverables –

- Project schedule
- Data request
- PIP
- Document outline
- Document template

## – Engagement –

- Bi-weekly team progress calls
- Project initiation meeting
- Kickoff meeting & city tour
- Project website launch (managed by FNI team)







# BIG ISSUES



# Work Phase 2 / BIG ISSUES



Work Phase #2  
**BIG ISSUES**  
– 3 months –

## – Overview –

- Review data and information provided by the Client
- Analyze changes to the physical, social, economic, and jurisdictional conditions in the City since the last plan update
- Identify the BIG ISSUES currently being experienced by and impacting residents

## – Deliverables –

- Draft BIG ISSUES update

## – Engagement –

- Bi-weekly team progress calls
- Online community vision survey & virtual engagements
- Establish Steering Committee and Sub-Committees
- Neighborhood Outreach
  - Community Touchpoint Campaign
  - Grassroots Engagement
  - Establish Community Ambassadors
- Community Town Hall #1 (Kickoff Summit)







# Work Phase 2 / BIG ISSUES

**Phase Objective:** Provide information to the public regarding the project, upcoming process, what to expect, and identify trends, issues and current market data to inform the process.

**IAP2 Engagement Level: Inform**

- What is the Vision 2035 Plan? Why is it important? How will it be used?
- Establish how the community can be involved
- Identify the Big Issues currently being experienced and their impact on residents







# BIG IDEAS



# Work Phase 3 / BIG IDEAS



Work Phase #3  
**BIG IDEAS**  
– 4 months –

## – Overview –

- Revisit and discuss the four focus areas of Diversity, Connectivity, Resource Management and Growth
- Conduct future scenario planning exercises to explore potential futures
- Identify a preferred future state for the community
- Identify the BIG IDEAS that will move the City towards the preferred future state

## – Deliverables –

- Draft BIG IDEAS update

## – Engagement –

- Bi-weekly team progress calls
- Steering Committee and Sub-Committee Meetings
- Neighborhood Outreach
  - Grassroots Engagement
  - Community Ambassadors
- Community Town Hall #2 (Future Scenario Planning Workshop)
- Council Briefing #1







# Work Phase 3 / BIG IDEAS

**Phase Objective:** Gather input and feedback from the public and stakeholders related to vision, goals, preliminary analyses and the future “Big Ideas” for Lewisville.

**IAP2 Engagement Level: Consult and Involve**

- Identify a preferred future state that the community wants to see
- Ensure community co-creation/buy-in of the Big Ideas



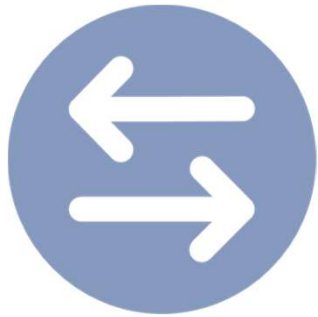




# BIG MOVES



# Work Phase 4 / BIG MOVES



Work Phase #4  
**BIG MOVES**  
– 4 months –

## – Overview –

- Revisit and confirm or revise the BIG MOVES that need to happen in order to see progress towards the BIG IDEAS
- Provide objectives, strategies and necessary background details or data to support each BIG MOVE

## – Deliverables –

- Draft BIG MOVES update

## – Engagement –

- Bi-weekly team progress calls
- Steering Committee and Sub-Committee Meetings
- Community Tours
- Neighborhood Outreach
  - Grassroots Engagement
  - Community Ambassadors
- Community Town Hall #3 (TBD)
- Council Briefing #2







# Work Phase 4 / BIG MOVES

**Phase Objective:** Community members are fully collaborative alongside the City and consultant identifying solutions and specific recommendations in the Vision 2035 Plan. The Big Ideas will inform the Big Moves Lewisville should take to realize its vision.

**IAP2 Engagement Level: Collaborate**

- Identify the Big Moves that need to happen in order to see progress toward the Big Ideas and community co-creation/buy-in of the Big Moves.



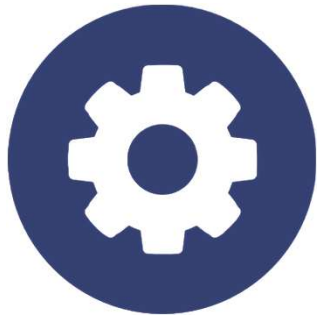




# BIG ACHIEVEMENT



# Work Phase 5 / BIG ACHIEVEMENT



Work Phase #5  
**BIG  
ACHIEVEMENT**  
– 2 months –

## – Overview –

- Summarize strategies into an executable implementation plan with clear and prioritized actions

## – Deliverables –

- Action Plan Matrix
- BIG ACHIEVEMENT draft chapter

## – Engagement –

- Bi-weekly team progress calls
- Steering Committee and Sub-Committee Meetings
- Neighborhood Outreach
  - Grassroots Engagement
  - Community Ambassadors
- Community Town Hall #4 (TBD)







# Work Phase 5 / BIG ACHIEVEMENT

**Phase Objective:** The community is empowered regarding final input and consensus and as a result become outspoken champions of the plan during adoption and beyond! Implementation is measured to show continual achievement to the public.

**IAP2 Engagement Level: Empower**

- Get community members and stakeholders excited about carrying out the implementation of the plan recommendations and make sure they know how to stay involved and keep the City accountable for implementation.







# PROJECT ADOPTION



# Work Phase 6 / Finalization & Adoption



Work Phase #6  
**Adoption**  
– 3 months –

## – Overview –

- Refine all draft chapters based on feedback and comments received
- Generate an Executive Summary
- Compile a full draft plan for staff review
- Revise the full draft plan and generate a final draft plan for adoption consideration
- Revise the final draft plan and generate a final document for adoption

## – Deliverables –

- Executive Summary
- Full draft plan
- Final draft plan
- Final document
- Appendices

## – Engagement –

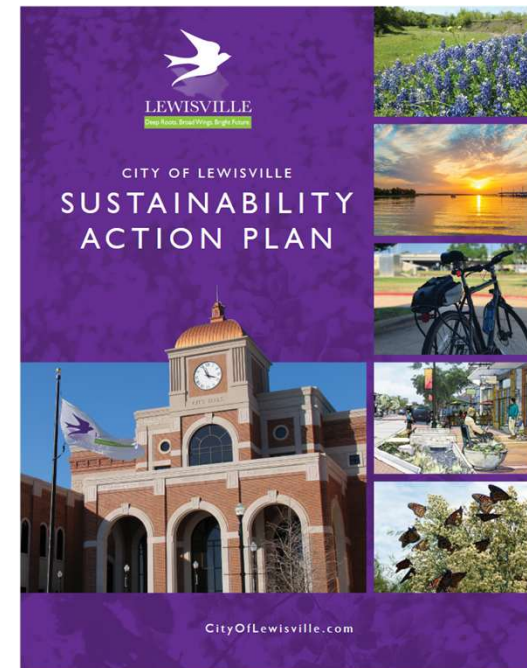
- Bi-weekly team progress calls
- Online public review and comment of draft plan
- P&Z meeting
- Council adoption meetings (2)
- Plan adoption celebration



# Sustainability & Resilience

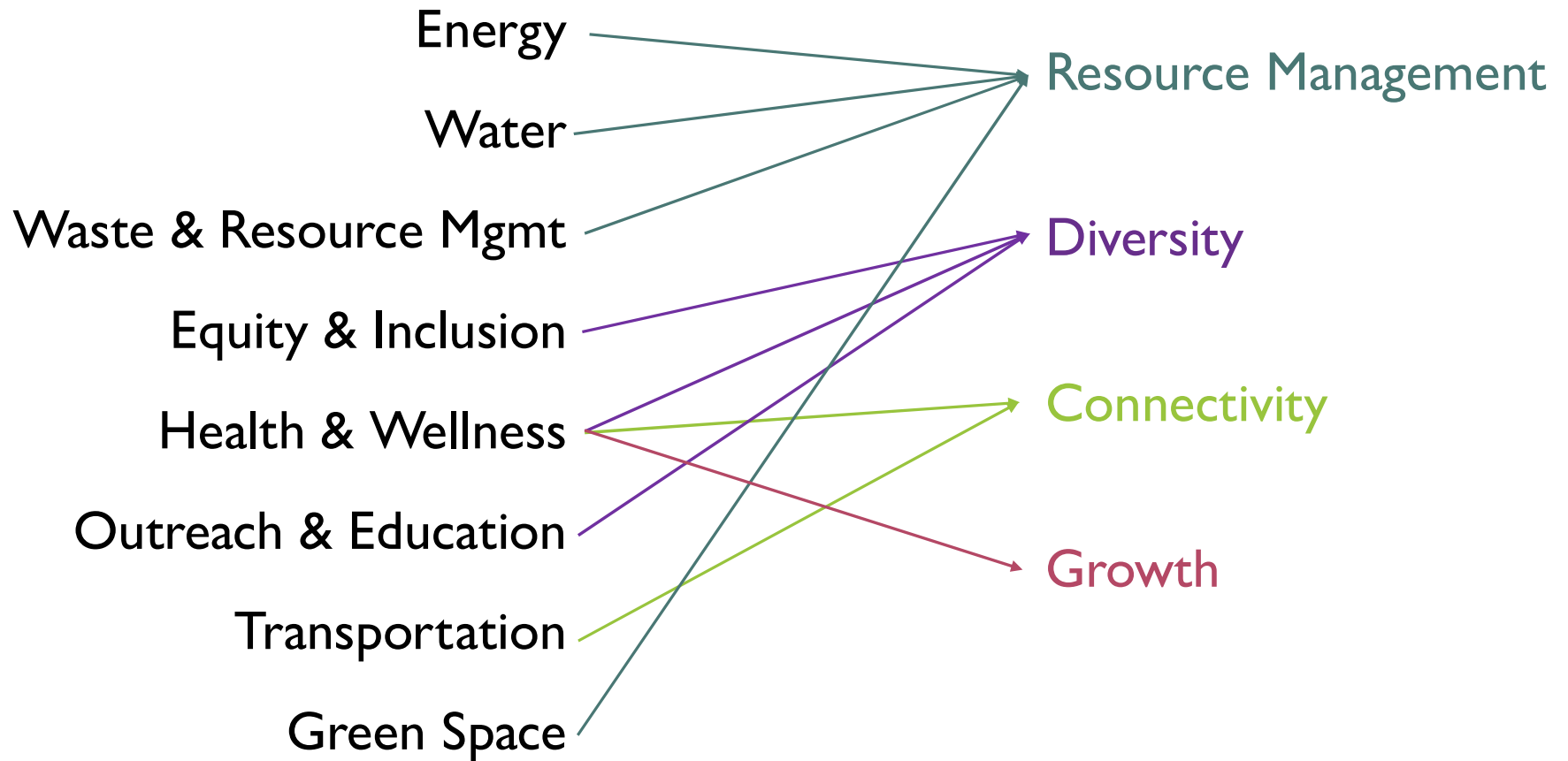
*Sustainability and resilience are the lenses through which the project is established and all recommendations are made.*

- Opportunity to educate the public regarding the City's existing sustainability Plan and actions
- Incorporation of sustainability strategies and KPIs into the Vision 2035 plan, replacing the Sustainability Action Plan.





# Sustainability & Resilience





# THANK *YOU!*

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Questions?

LEWISVILLE

2035

V I S I O N





February 21, 2025

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# CITY OF LEWISVILLE, TEXAS WATER AND SEWER RATE UPDATE

NewGen  
Strategies & Solutions



## BACKGROUND

- City contracted with NewGen to conduct annual rate study
- Initial study performed in preparation of Castle Hills annexation
- Rate study objectives
  - Full alignment of City and District rates
  - Conservation-based rates introduced citywide
  - Prevent rate spikes
  - Gradual changes to other rate structure components
  - Ensure adequate revenue support for operations/expanded capital program
  - Incorporate updated project cost estimates from HDR
  - Address increased debt service requirements



# FINANCIAL / CAPITAL PLANNING

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## MARKET ANALYSIS SHOWS SIGNIFICANT COST INCREASES FOR WATER / WASTEWATER (W/WW) PROJECTS SPANNING 2019 - 2024

- Planning level project costs in the master plans were developed 2019 – 2020
- Since that time, construction costs experienced significant increases (as reflected in bids for W/WW projects across Texas and the U.S.)
- HDR reviewed market trends for project bids, unit prices, and cost indices spanning 2020 – 2024
- Producer Price Index (PPI) from the Bureau of Labor Statistics (BLS) shows significant cost increases for common materials used in W/WW infrastructure projects
- S&P Global Cost Index (tracks labor and materials costs) shows an increase of 34.4% in the W/WW sector spanning 2019 through 2024
- Engineering News Record (ENR) data for the same time frame show cumulative increases of 34% for the Building Cost Index (BCI) and 26% for the Construction Cost Index (CCI)

Materials	Cumulative Increase (2019 to 2024)
Ready-Mix Concrete	42.0%
Steel Products	23.5%
Steel Pipe	23.4%
PVC Pipe	99.9%
PVC Conduit	56.8%
Stainless Steel Pipe	33.0%
Ductile Iron Pipe	33.5%
Copper Wire	45.4%
Fabricated Structural Metals	38.8%
Fabricated Rebar	28.2%
Diesel Fuel No. 2	59.6%
Prefabricated Metal Buildings	51.8%
Truck Transportation of Freight	18.8%



## HDR REVIEWED AND UPDATED PLANNING LEVEL PROJECT COSTS

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- Included review and update of master plan project costs:
  - Raw Water Intake and C.R. Feaster Water Treatment Plant (CRFWTP) related projects in the CIP
  - Pump Station and Ground Storage Tank related projects in the CIP
  - Prairie Creek WWTP related projects in the CIP
- Approach:
  - For master plan projects, used a combination of:
    - HDR's updated WaterCost Model (model accounts for cost indices and recent escalation)
    - Comparison to recent bid data for similar projects (e.g., review of unit prices)
    - Comparison to recent budgetary pricing for major equipment on similar projects (e.g., ozone generation equipment)
  - For elevated storage tank rehabilitation / re-painting projects in the CIP, applied a 30% market escalation factor to adjust costs to 2024 dollars
  - For all other projects (where HDR did not develop original planning level costs), including pipelines, applied a 30% market escalation factor to adjust costs to 2024 dollars
  - An annual inflation rate of 4% (adjustable) is then be applied in the EconH2O CIP Tool to forecast project costs in future years



## DRIVERS OF EXPANDED CAPITAL PROGRAM

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- Growth in Old Town and other developments city-wide
  - Added demands placed on City water/sewer utility infrastructure
- Needed capacity for supporting future growth
- Wastewater system requirements for plant capacity
  - Governed by TCEQ wastewater system rules and requirements
  - Initiating expansion plans when reaching 75% of permitted flow capacity
  - Under construction when permitted flow capacity reaches 90%



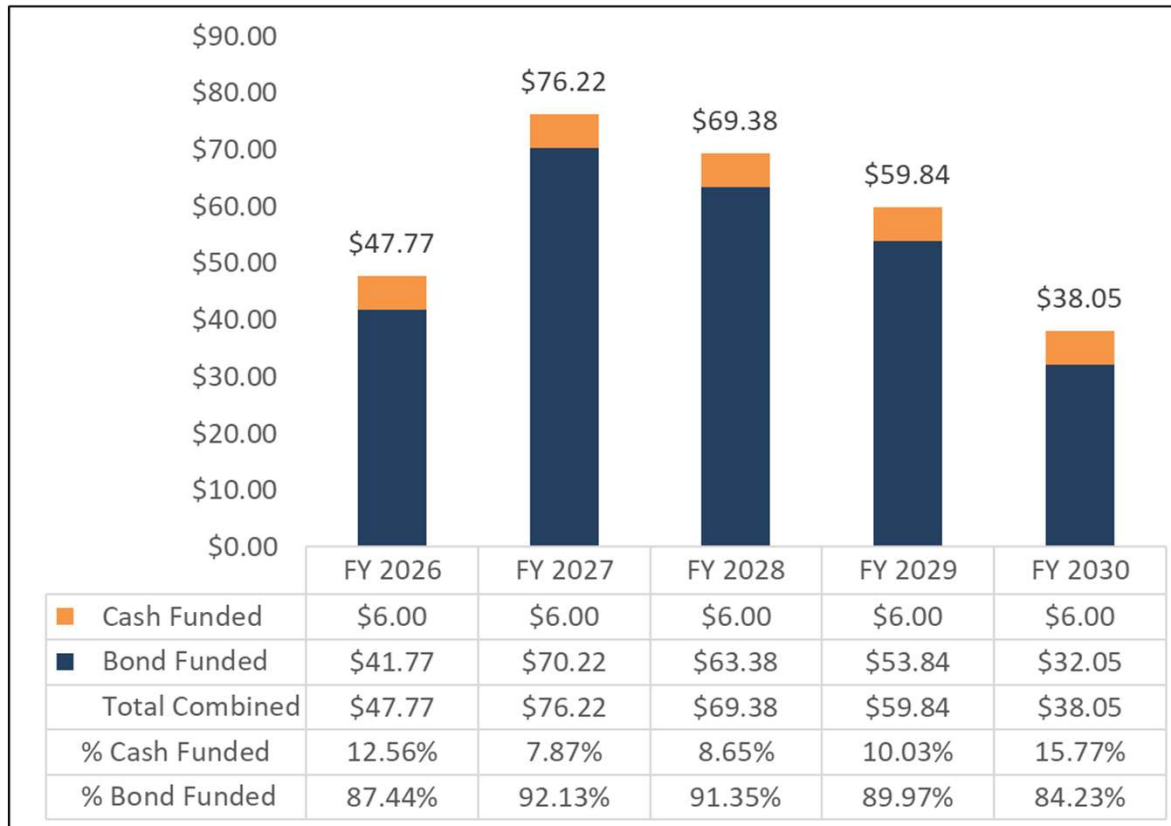
# CAPITAL PLANNING / FUNDING

- Debt rating agencies continue to place emphasis on the “financial leverage” (i.e., debt load) of utilities
- Fitch, April 2019
  - Adopted new ratings criteria which will likely result in upgrades for utilities with “relatively low leverage, and downgrades resulting from the recognition of higher leverage and/or elevated operating risk”
- The City must carefully balance its use of debt and cash capital funding in order to maintain its overall bond rating which ensures the lowest cost of borrowing and supports cost effective service to ratepayers
- From FY 2026 to FY 2030, estimated capital needs for the utility total over \$291 million
  - The City should continue to evaluate its planned capital funding going forward and, where possible, carefully balance its use of cash and debt
  - Regular rate adjustments have enabled the City to keep pace with inflation, while also providing critical funds for infrastructure reinvestment
- Assuming a 16-year debt term for all bond-funded projects



# PROJECTED CIP FUNDING

(\$ Millions)



- While the City has historically targeted a 50% cash / 50% debt capital funding structure, current reinvestment demands require higher use of debt to support reasonable and affordable rates to customers.
- The City should continue to balance its overall leverage to support its long-term bond rating and achieve a lower cost of capital.



# WATER AND SEWER RATE PLAN

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## UTILITY RATE-SETTING GOALS

- Fully aligned equitable and sufficient rate structure for the combined set of customers (Legacy Lewisville and Castle Hills) by FY 2026
- Ensure sufficient cost recovery (Revenue Generation)
- Plan for future capital investment with a goal of maintaining and potentially increasing cash funding (Capital Reinvestment)
- Maintain and enhance financial metrics (Reserves, Debt Service Coverage)
- Continue to monitor customer affordability to mitigate rate shock
- *Next Rate Adjustment October 2025*



# WATER RATES STRATEGY

- ***Fixed Charge***

- Remove the 2,000-gallon allowance from the minimum bill while adjusting the minimum charge downward in FY 2026

- ***Volumetric Charge***

- Reduce the number of Residential tiers from 6 to 4 in FY 2026
- Implement conservation-based rate structure for Commercial and Irrigation classes (increasing conservation signal)

- *Rate setting involves the balance of competing objectives. The City should strive for a rate structure which is understandable by customers yet sufficient to achieve the City's financial and conservation-oriented goals and objectives.*



# SEWER RATES STRATEGY

- ***Fixed Charge***

- Remove the 2,000-gallon allowance from the minimum bill

- ***Volumetric Charge***

- Reduce Residential volumetric rate to offset the additional 2,000 gallons of flow
- Establish uniform volumetric sewer rate by class



## PROPOSED WATER RATES – MINIMUM CHARGE

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	Current Legacy Lewisville	Current Castle Hills	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
Minimum Charge							
1" or less	\$27.57	\$34.75	\$19.79	\$22.00	\$24.00	\$26.73	\$28.33
1 ½"	91.81	115.72	65.90	73.26	79.92	89.01	94.34
2"	146.95	185.22	105.48	117.26	127.92	142.47	151.00
3"	275.70	405.53	197.90	220.00	240.00	267.30	283.30
4"	459.59	729.75	329.90	366.74	400.08	445.59	472.27
6"	918.91	1,621.78	659.60	733.26	799.92	890.91	944.24
8"	1,470.31	2,780.00	1,055.40	1,173.26	1,279.92	1,425.51	1,510.84
10"	2,113.79	4,401.78	1,517.30	1,686.74	1,840.08	2,049.39	2,172.07



## PROPOSED RESIDENTIAL VOLUMETRIC WATER RATES PER 1,000 GALLONS

---

	Current	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
0 – 2,000 gallons	\$ -	\$4.08	\$4.35	\$4.96	\$5.52	\$5.85
2,001-8,000 gallons	3.89	4.08	4.35	4.96	5.52	5.85
8,001-15,000 gallons	3.89	4.70	5.19	6.14	7.07	7.75
15,001-20,000 gallons	4.24	4.70	5.19	6.14	7.07	7.75
20,001-25,000 gallons	4.24	5.64	6.43	7.83	9.28	10.46
25,001-35,000 gallons	5.06	5.64	6.43	7.83	9.28	10.46
35,001-45,000 gallons	6.06	6.93	8.12	10.15	12.36	14.28
45,001-55,000 gallons	7.06	6.93	8.12	10.15	12.36	14.28
55,001+ gallons	8.06	6.93	8.12	10.15	12.36	14.28

Notes:

[1] Legacy Lewisville and Castle Hills Residential rates currently are fully aligned.

[2] Reducing the number of tiers from 6 to 4.



## PROPOSED COMMERCIAL/INDUSTRIAL VOLUMETRIC WATER RATES PER 1,000 GALLONS

	Current Legacy Lewisville	Current Castle Hills	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
0 – 2,000 gallons	\$ -	\$ -	\$ 4.15	\$ 4.42	\$ 5.04	\$ 5.61	\$ 5.95
2,001 – 10,000 gallons	3.76	4.00	4.15	4.42	5.04	5.61	5.95
10,001 – 15,000 gallons	3.76	4.00	4.77	5.28	6.24	7.19	7.88
15,001 – 25,000 gallons	3.76	4.50	4.77	5.28	6.24	7.19	7.88
25,001 – 35,000 gallons	3.76	5.71	4.77	5.28	6.24	7.19	7.88
35,001 – 45,000 gallons	3.76	6.71	4.77	5.28	6.24	7.19	7.88
45,001 – 55,000 gallons	3.76	7.71	4.77	5.28	6.24	7.19	7.88
55,000+ gallons	3.76	8.71	5.49	6.30	7.72	9.21	10.45

Note: Implementing a tiered rate structure to promote conservation.



## PROPOSED IRRIGATION VOLUMETRIC WATER RATES PER 1,000 GALLONS

---

	Current Legacy Lewisville	Current Castle Hills	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
0 – 2,000 gallons	\$ -	\$ -	\$4.50	\$4.79	\$5.46	\$6.08	\$6.44
2,001 – 15,000 gallons	3.76	4.90	4.50	4.79	5.46	6.08	6.44
15,001 – 60,000 gallons	3.76	4.90	5.51	6.03	7.06	8.08	8.77
60,001 – 100,000 gallons	3.76	4.90	6.34	7.20	8.74	10.35	11.63
100,000+ gallons	3.76	4.90	7.29	8.60	10.82	13.26	15.40

Note: Implementing a tiered rate structure to promote conservation.



# PROPOSED SEWER RATES

	Current Legacy Lewisville	Current Castle Hills	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
<b>Minimum Charge</b>							
Residential	\$10.91	\$10.91	\$13.00	\$15.00	\$17.00	\$18.93	\$20.07
Commercial / Industrial	13.64	16.45	19.60	22.62	25.63	28.54	30.26
<b>Volumetric Charge per 1,000 gallons</b>							
Residential							
0- 2000 gallons	\$ -	\$4.16	\$3.50	\$3.68	\$3.92	\$4.37	\$4.63
2,000+ gallons	4.92	4.92	3.50	3.68	3.92	4.37	4.63
Commercial / Industrial							
0- 2000 gallons	\$ -	\$ -	\$5.38	\$5.66	\$6.03	\$6.72	\$7.12
2,000+ gallons	5.38	5.38	5.38	5.66	6.03	6.72	7.12



# COMBINED WATER AND SEWER BILL IMPACT

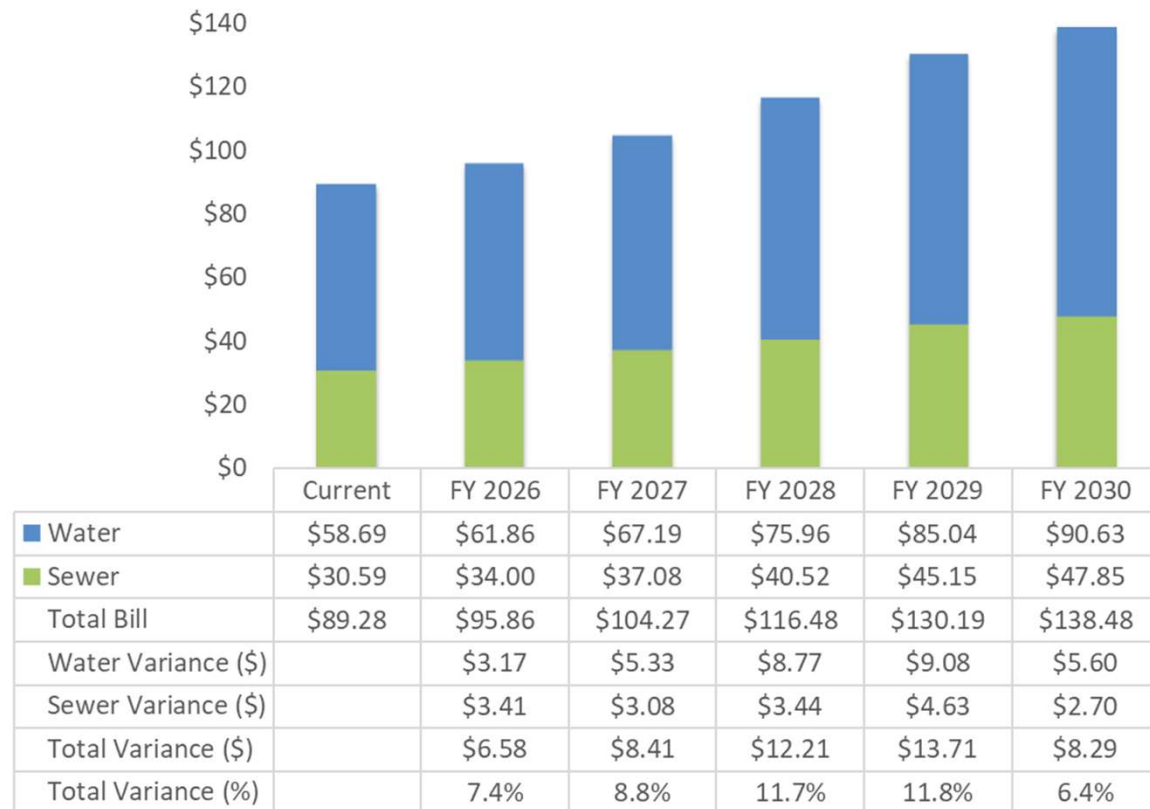
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# RESIDENTIAL CUSTOMER MONTHLY BILL IMPACT

¾" Meter

10,000 gallons water/  
6,000 gallons sewer



Notes:

[1] The current bill represents Legacy Lewisville. The current Castle Hills bill is \$104.78.

[2] Beginning in FY 2026, the bills for Castle Hills and Legacy Lewisville customers are the same.



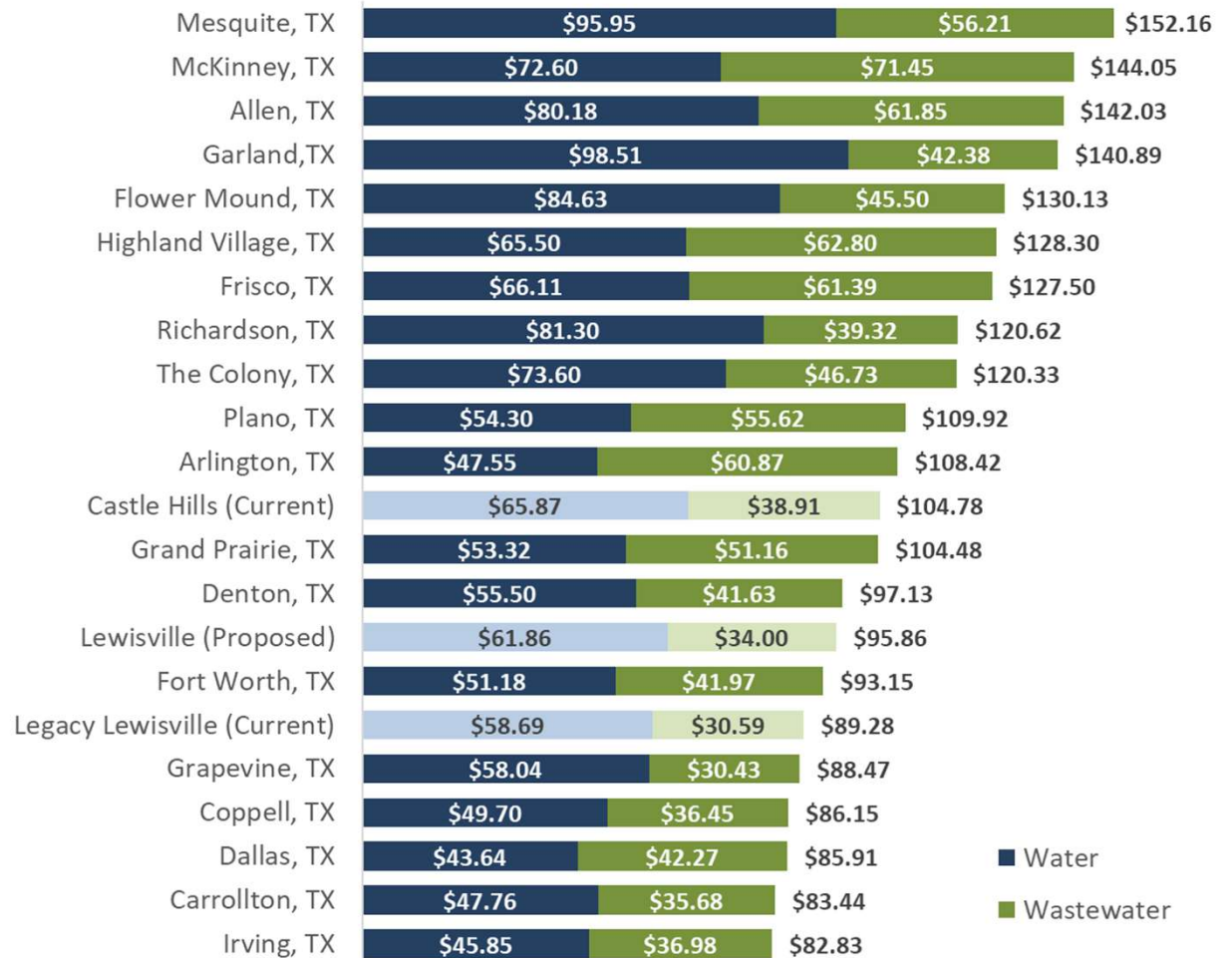
# REGIONAL COMPARISON

Average Residential ¾" Customer Bill

10,000 gallons water /  
6,000 gallons sewer

*Bill Comparisons are based on  
NewGen's interpretation of publicly  
available data as of January 2025.*

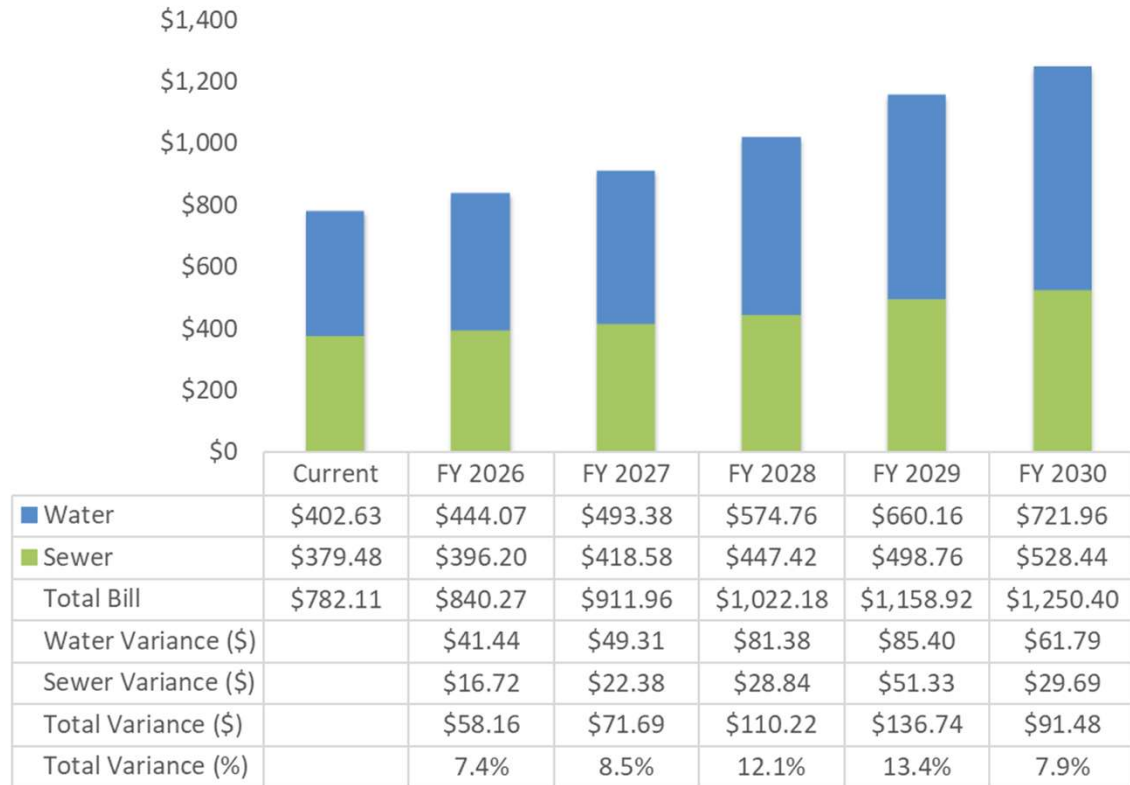
Residential ¾" Monthly Bill for 10,000 gal water / 6,000 gal sewer





# COMMERCIAL CUSTOMER MONTHLY BILL IMPACT

2" Meter  
70,000 Gallons



Note:

[1] The current bill represents Legacy Lewisville. The current Castle Hills bill is \$996.46.

[2] Beginning in FY 2026, the bills for Castle Hills and Legacy Lewisville customers are the same.



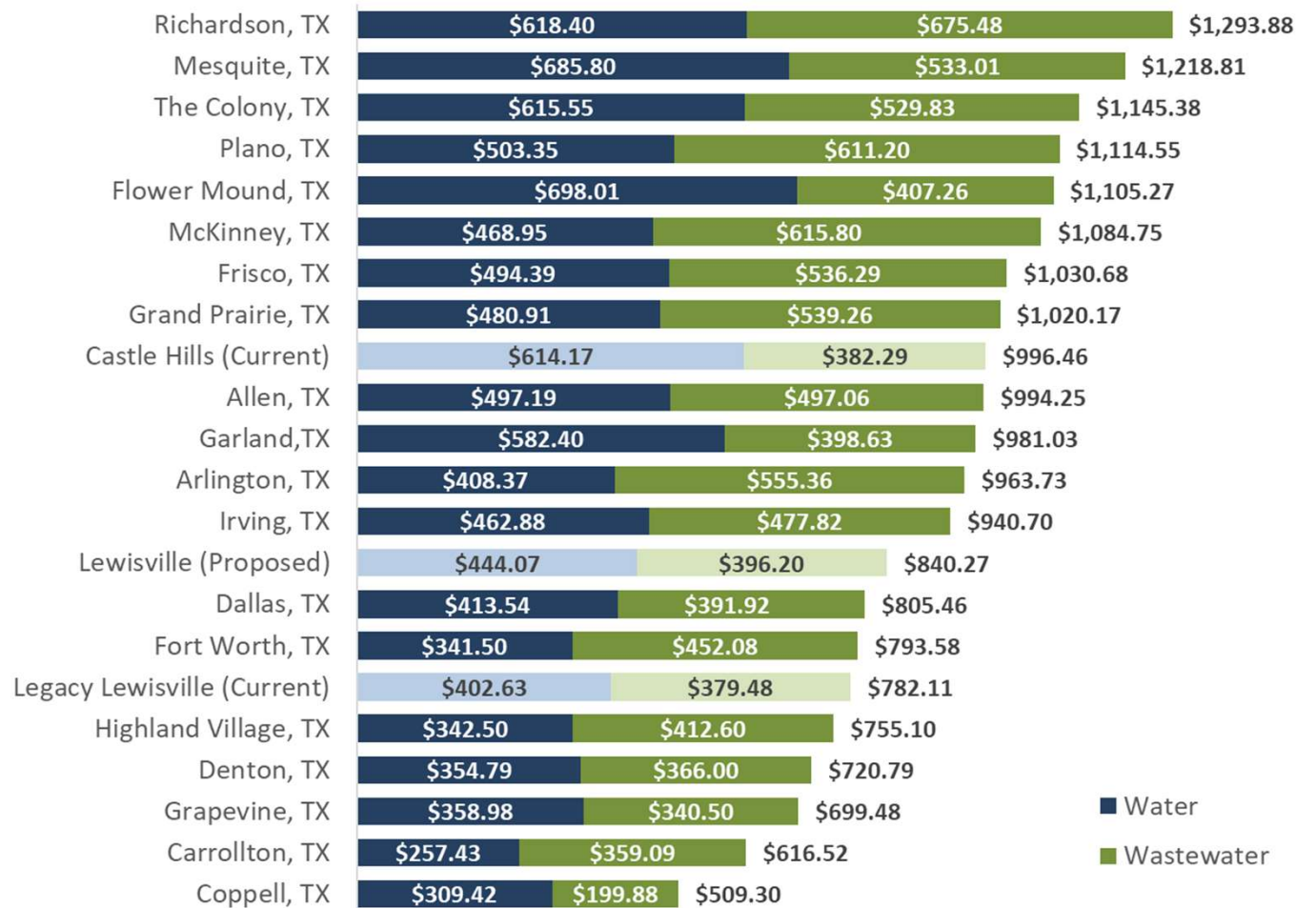
# REGIONAL COMPARISON

Average Commercial  
2" Customer Bill

70,000 gallons water /  
70,000 gallons sewer

*Bill Comparisons are based on  
NewGen's interpretation of publicly  
available data as of January 2025.*

Commercial 2" Monthly Bill for 70,000 gal water / 70,000 gal sewer





# IRRIGATION CUSTOMER MONTHLY BILL IMPACT

2" Meter  
60,000 Gallons



## Notes:

[1] The current bill represents Legacy Lewisville. The current Castle Hills bill is \$469.42.

[2] Beginning in FY 2026, the bills for Castle Hills and legacy Lewisville customers are the same.



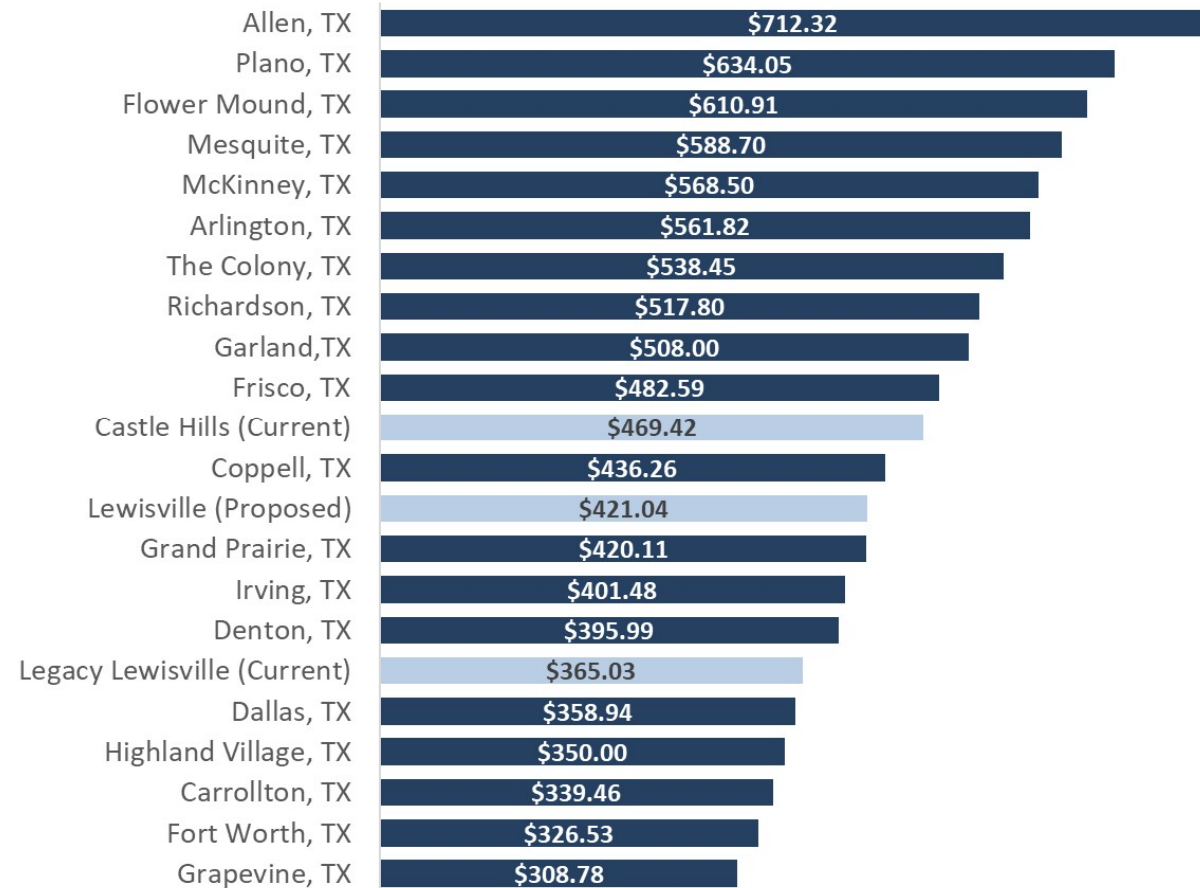
# REGIONAL COMPARISON

Average Irrigation 2"  
Customer Bill

60,000 gallons water /  
60,000 gallons sewer

*Bill Comparisons are based on  
NewGen's interpretation of publicly  
available data as of January 2025.*

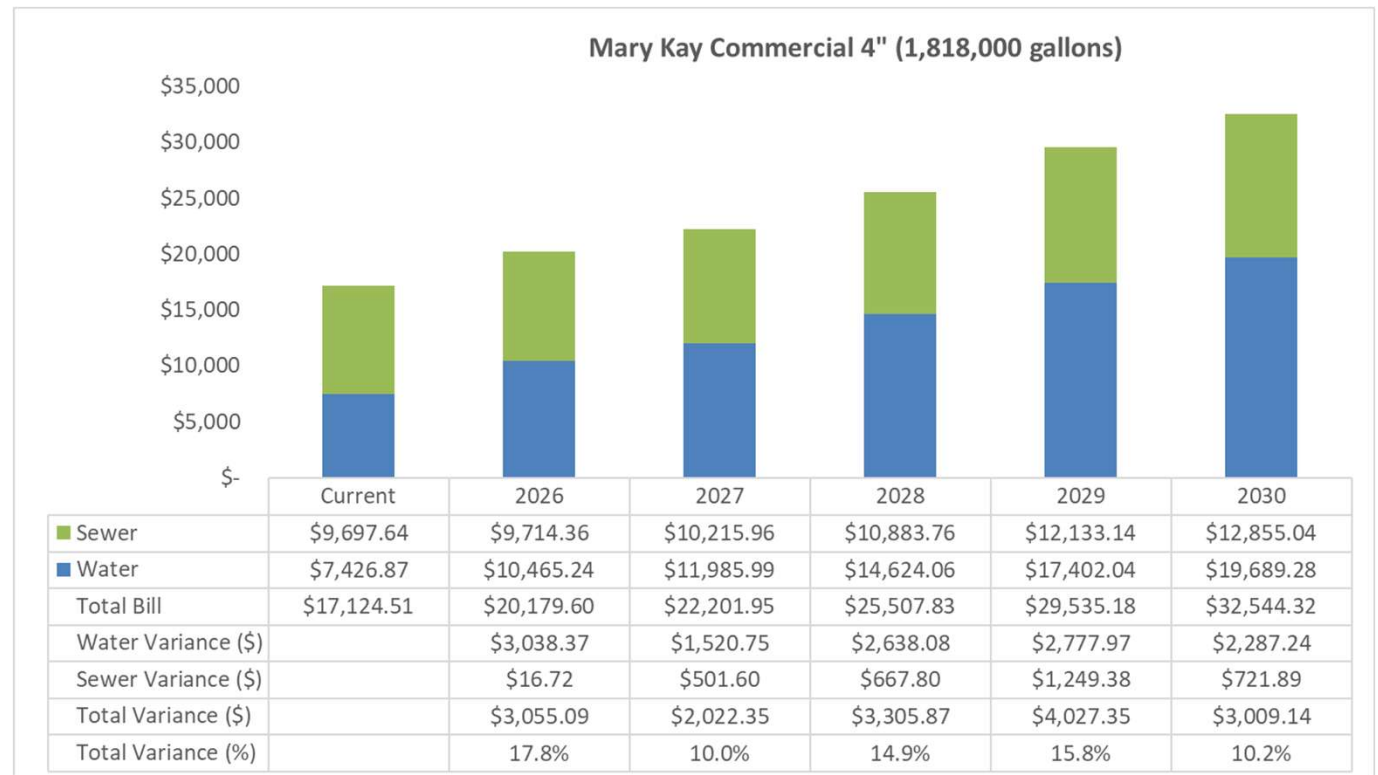
Irrigation 2" Monthly Bill for 60,000 gal water





# YEAR OVER YEAR TOTAL BILL IMPACT

Mary Kay  
Commercial 4"  
1,818,000 gallons

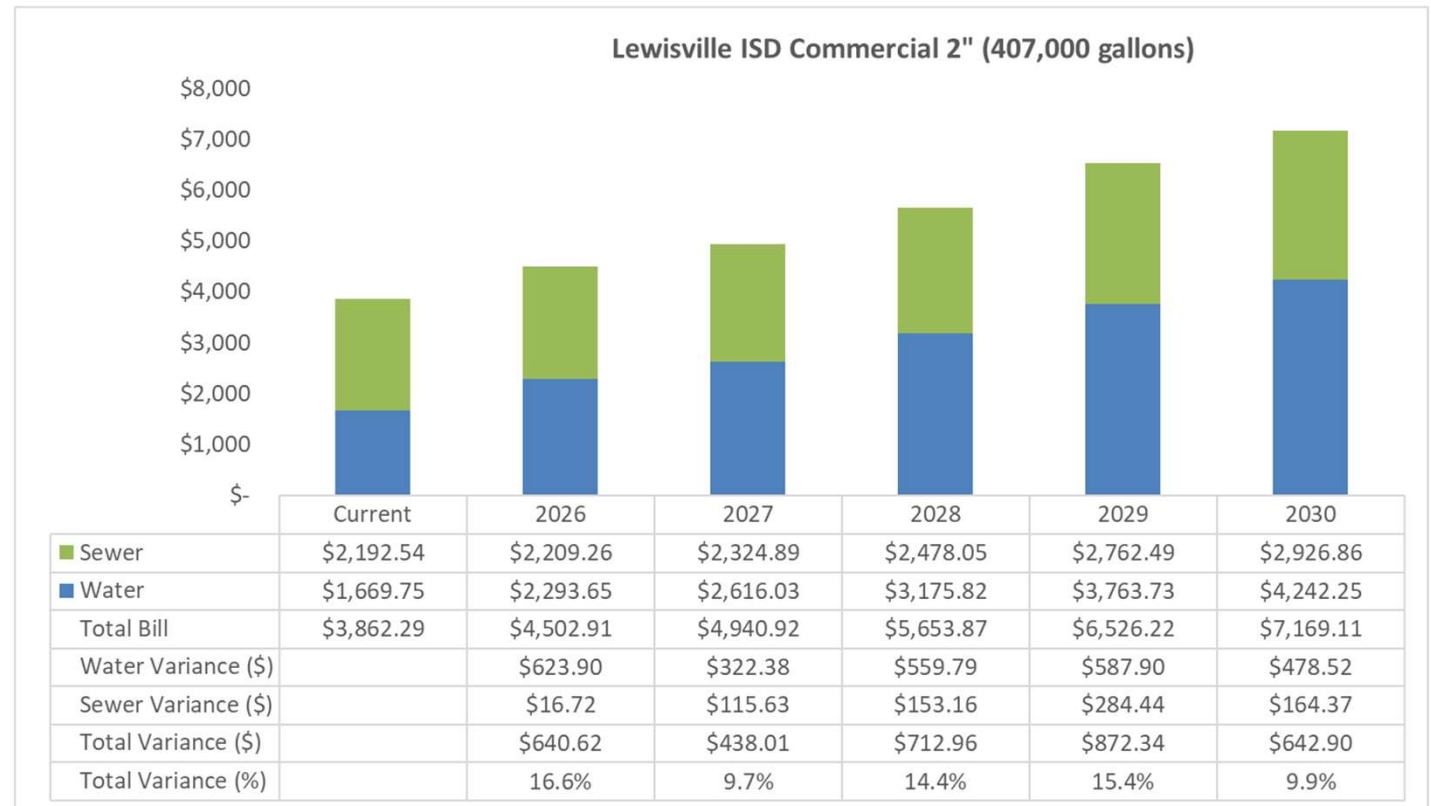


*Note: Mary Kay has multiple accounts. This chart represents their account with the largest average usage.*



# YEAR OVER YEAR TOTAL BILL IMPACT

Lewisville ISD  
Commercial 2"  
407,000 gallons

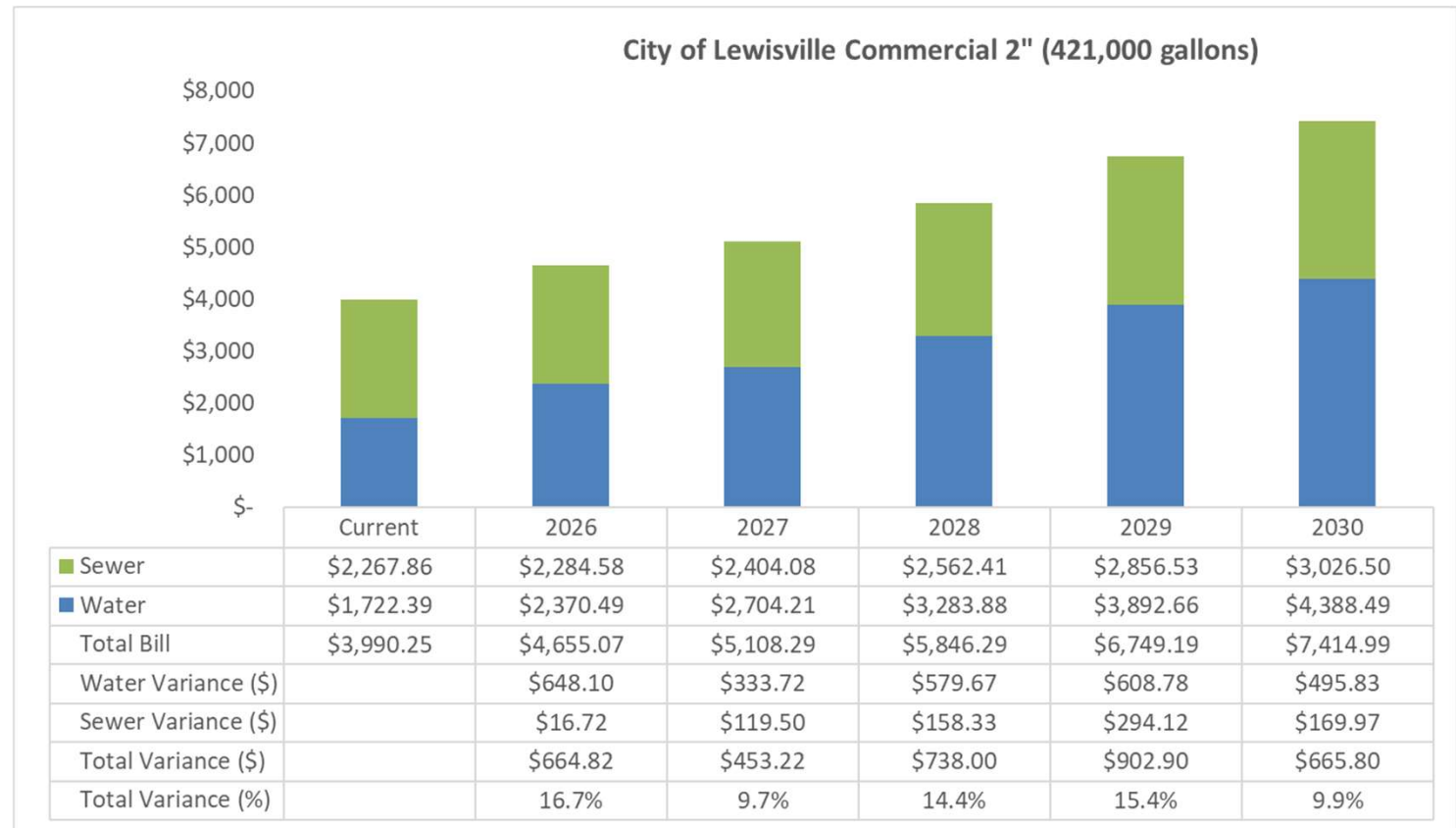


*Note: Lewisville ISD has multiple accounts. This chart represents their account with the largest average usage.*



# YEAR OVER YEAR TOTAL BILL IMPACT

City of Lewisville  
Commercial 2"  
421,000 gallons

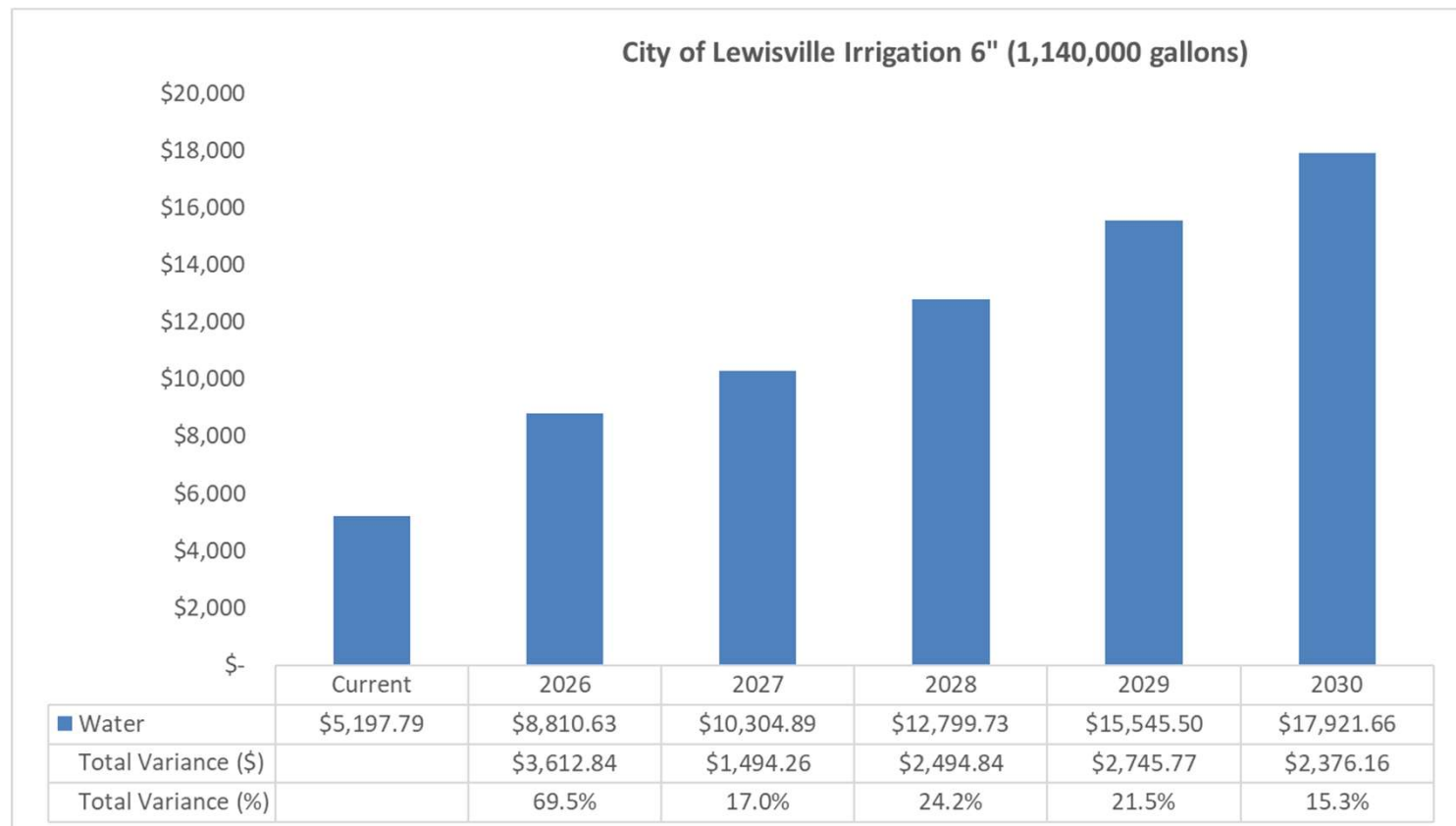


*Note: City of Lewisville has multiple Commercial accounts. This chart represents their account with the largest average usage.*



# YEAR OVER YEAR TOTAL BILL IMPACT

City of Lewisville  
Irrigation 6"  
1,140,000 gallons



*Note: City of Lewisville has multiple Irrigation accounts. This chart represents their account with the largest average usage.*



## FY 2022 STORMWATER RATE STUDY

- The City implemented annual stormwater fee increases from FY2023 through FY2025, raising the cost of stormwater service by \$3.00, from \$4.00 to \$7.00
- Continued reinvestment in the stormwater system is needed, which will require the City to continue its evaluation and assessment of the funding needed for stormwater service
- City staff recommends conducting a Stormwater Rate Study in FY 2026 to update the current financial plan and assess funding needs going forward



# QUESTIONS?

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# THANK YOU

**NEWGEN STRATEGIES AND SOLUTIONS**  
275 W. CAMPBELL ROAD, SUITE 440  
RICHARDSON, TEXAS 75080

**CHRIS EKRUT, DIRECTOR**  
972-232-2234  
[CEKRUT@NEWGENSTRATEGIES.NET](mailto:CEKRUT@NEWGENSTRATEGIES.NET)



# **LAKE REDEVELOPMENT PROJECT UPDATE**





# 10 Minute Walk to a Park Update

City Council Retreat | Feb 2025





# AGENDA



**10 Minute Walk to a Park Status**



**Lewisville Acquisition of Parks Strategy (LAPS)**



**LISD and McDaniel Properties**



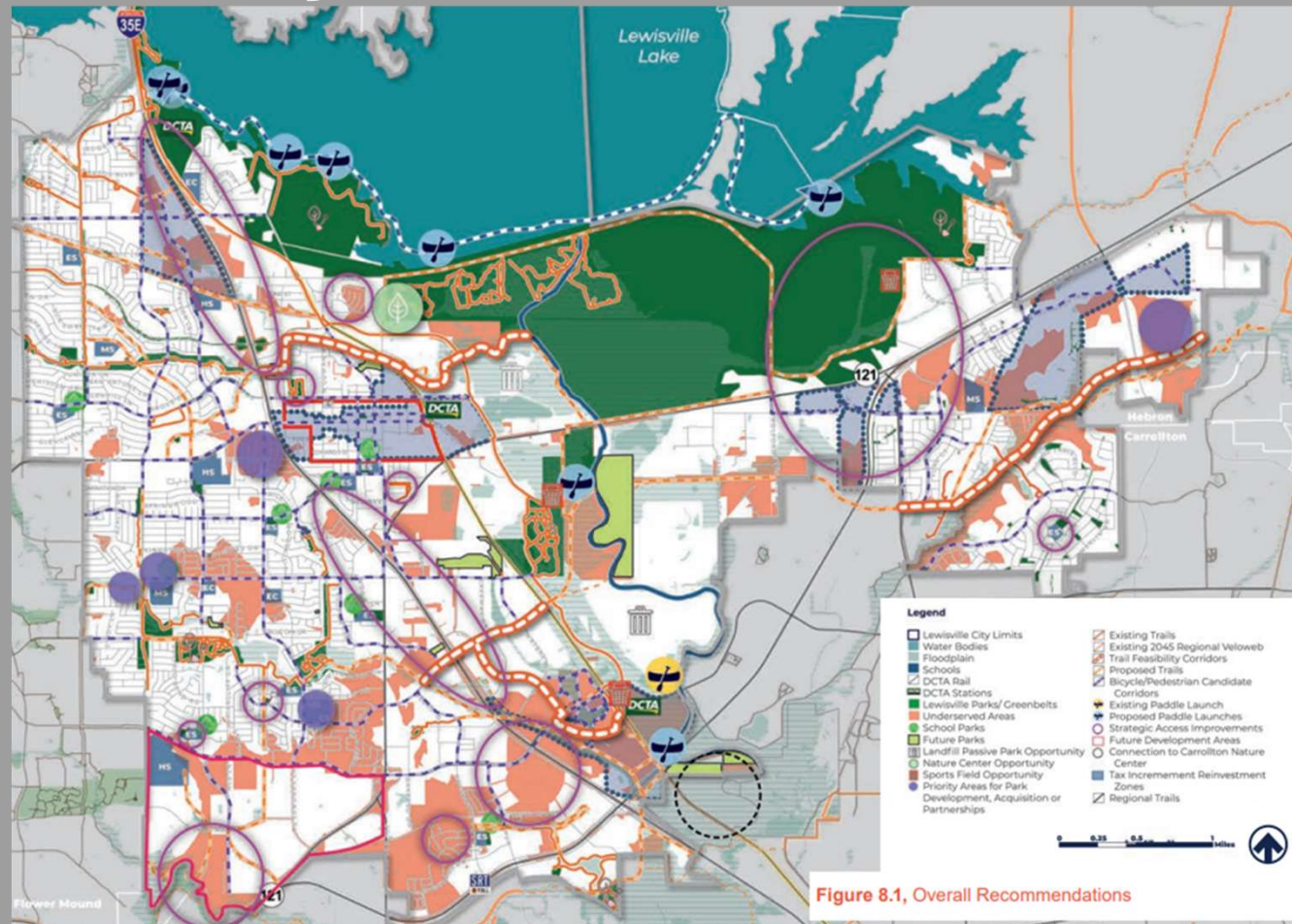
**Three Priority Park Deserts**



**Other 10MWP Projects & Next Steps**



# Healthy Infrastructure Plan





# Healthy Infrastructure Plan

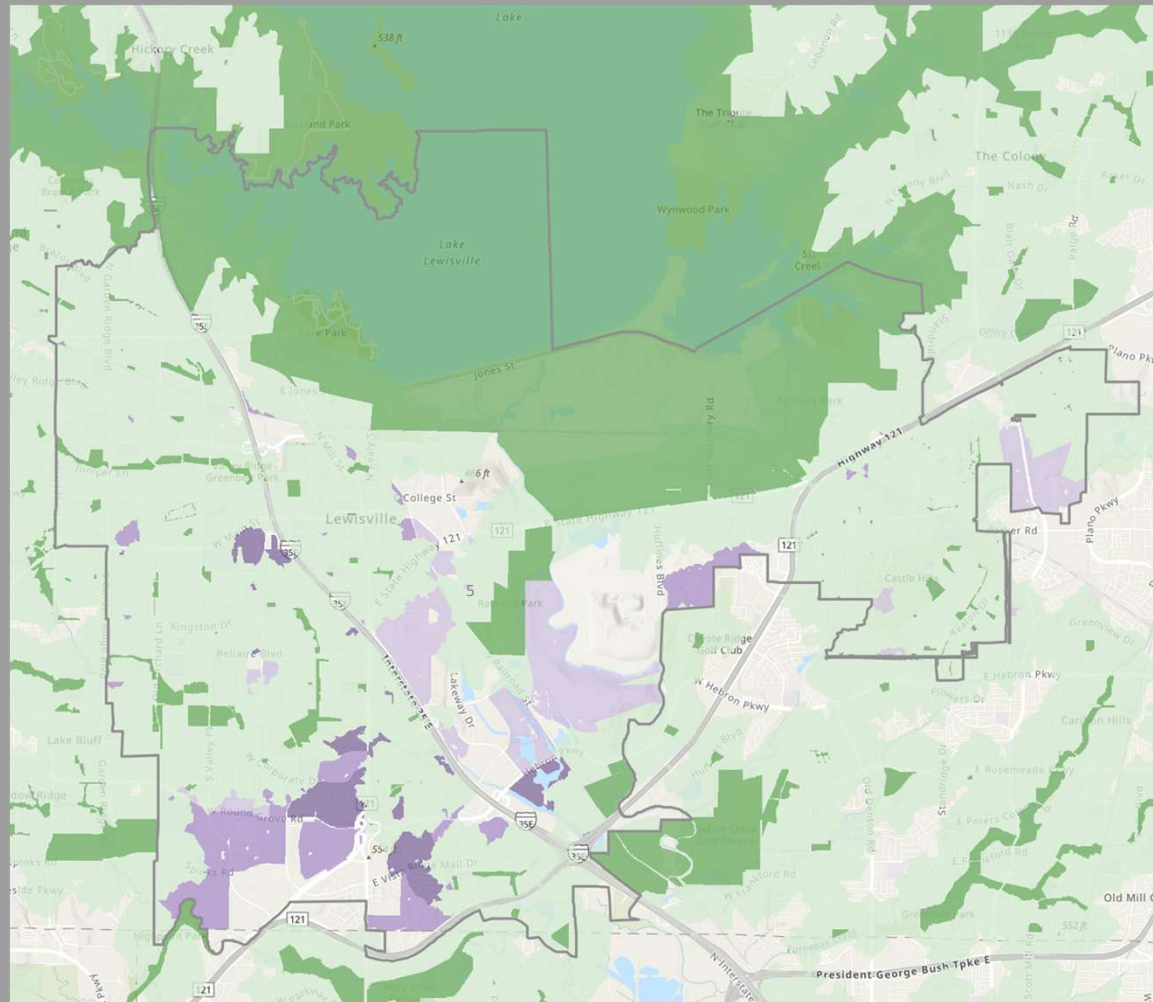
## High Priority Needs List

The following list represents strategies from the implementation program that are of critical importance to implement in the near-term. The development of this list helps convey priorities when applying for grant funding from TPWD and other partners.

- 1.1.1: Implement trail and sidewalk improvements that take advantage of existing infrastructure and improve connectivity and access to parks.
- 1.1.2: Develop and activate currently undeveloped parkland as resources are available.
- 1.3.5: Implement improvements based on the individual park master plans to Vista Ridge Park, Spillway Park, Thrive Nature Park, and Lake Park.
- 2.1.1: Install additional wayfinding signage throughout the community to direct to major park amenities.
- 2.3.2: Identify preferred site, create a design, and seek funding and partnerships for a nature center near LLELA.
- 3.3.2: Implement improvements to the ten audit parks assessed in this master plan.
- 3.3.6: Acquire property for additional multi-use sports fields.
- 4.1.4: Continue to work with surrounding communities on identifying paddling trail launch sites along Lewisville Lake and Elm Fork of the Trinity River.
- 4.2.6: Create options for recreation-based sports programming in addition to existing sports leagues.
- 4.3.3: Encourage the development and sustainment of friends of the park groups for fundraising efforts.
- 5.2.4: Create a dataset that prioritizes suitable planting species.
- 5.2.9: Establish an urban forestry unit within the Parks and Recreation Department.
- 6.1.5: Incorporate parks and open spaces with the redevelopment of older multi-family buildings and older commercial development.
- 6.2.4: Prioritize recreation programs identified as most needed through this process, including adult fitness and wellness, outdoor concerts, and senior programs.



# Trust for Public Land 10MWP Map





# LAPS Desk Audit

- **Modeled after Texas Parks and Wildlife Department Process**

- State Park Land Acquisition Strategy Handbook (**SPLASH**)
- Assessment of barriers to acquisition and development of new parks

- **Lewisville Acquisition of Parkland Strategy (LAPS)**

- Phase 1 - high level questions to identify “red flags”
  - Yes or No response
  - Does not require all “yes” responses to move forward
- Phase 2 - weighted analysis of ideal characteristics of a new park property
  - Possible weighted score is 100
- City-wide application
  - Focus on target areas identified in Healthy Infrastructure Plan
- Performed by PARD Staff using information from GIS, HIP and DCAD
- If scoring merits, a follow up on-site visit and survey of the property is scheduled



# LAPS Phase 1 Criteria

Criteria	Description
<b>Size</b>	More than 1 acre?
<b>Context</b>	Protected from surrounding development that would prevent ability to protect resources and public use?
<b>Accessibility</b>	Accessible through a road that can provide public access to the site?
<b>Legal Ownership</b>	Will PARD retain ownership if property is pursued?
<b>Authority</b>	Does the seller have the full authority to enter into an agreement with COL?
<b>Land Use</b>	Free of any negative impacts from a past land use that would make unsafe for public use today?
<b>Existing Infrastructure</b>	Relatively free of buildings and/or other utilities that are aging or fail to meet code?
<b>PARD Mission</b>	Is the owner committed to the types of outdoor recreation opportunities/facilities?



# LAPS Phase 2 Criteria

Criteria	Description	Weighted Value
<b>Mission Critical</b>	Natural and cultural resources evaluation	2
<b>Strategic Location</b>	Location relative to existing parks, trails, natural resources or areas identified in plans	1
<b>Recreation Opportunities</b>	Evaluate capacity to enhance recreation experiences	1
<b>Economic Feasibility</b>	Availability of funds to develop and operate	1
<b>Legal Considerations</b>	Capacity of owner to sell, threat of adjacent development	1
<b>Stakeholder Support</b>	Evaluate alignment with policy and plan goals, action steps	2
<b>New Residents Served</b>	10 Minute Walk to a Park analysis and impact	3



# LAPS Application

- **Property Analysis and Applicability**

- Undeveloped, raw property
- Developed property with large swaths of open space
- Developed property with potential for redevelopment as a park
- Properties owned by other governmental, quasi-governmental entities
- City property not dedicated as parkland

- **Determinations**

- Pursue acquisition
- Pursue partnership via easement or agreement
- Look for another option to bridge the 10MWP gap
  - Improved connectivity via trails, pedestrian infrastructure



# Potential Properties Evaluated for Acquisition

- **LISD and McDaniel Properties**

- Creekside Elementary School
- Portion of LISDOLA
- McDaniel Property

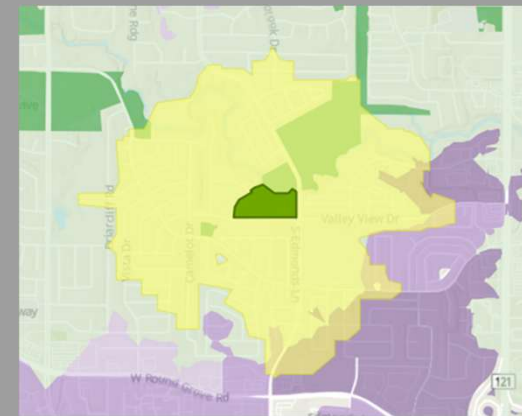
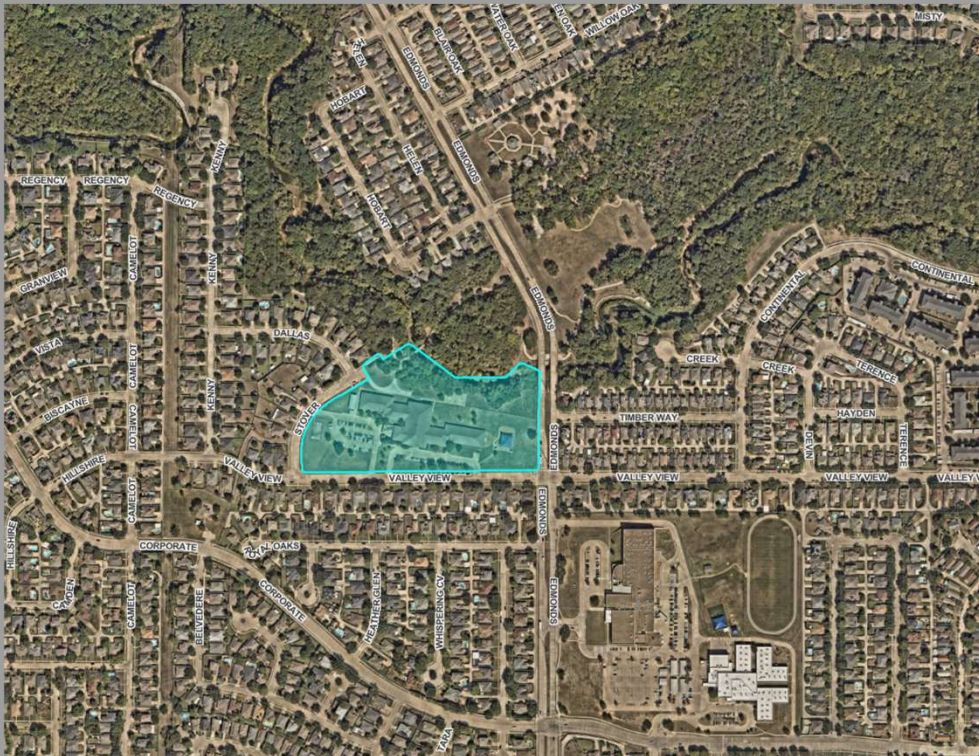
- **Three Priority Park Deserts**

- Vista Ridge Estates Neighborhood
- Meadows Neighborhood
- North Edmonds Neighborhood

10



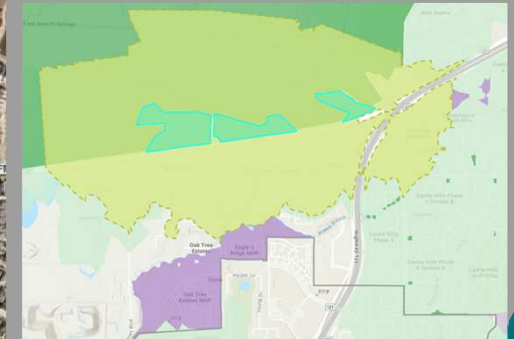
# Creekside Elementary



PROPERTY	LAPS SCORE	10 MWP INCREASE	NEW RESIDENTS	POTENTIAL	NOTES
Creekside Elementary	68%	0.5	640*	Multi-use, Sponge Park	12.07 Acres



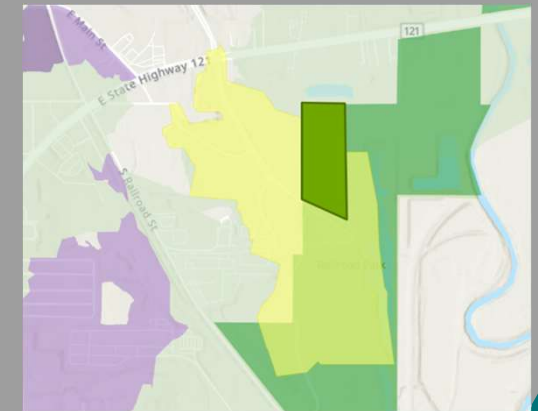
# Eastern LISDOLA Acreage



PROPERTY	LAPS SCORE	10 MWP INCREASE	NEW RESIDENTS	POTENTIAL	NOTES
LISDOLA East	82%	<0.1	1,587	Preserve, Sponge Park, Trail and access support	15.19 Acres



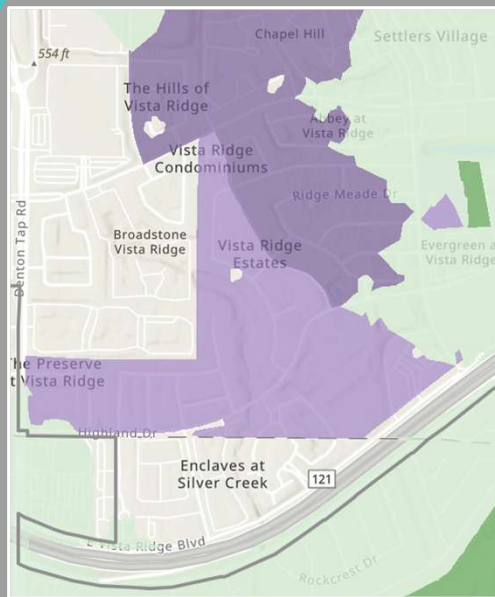
# McDaniel Property



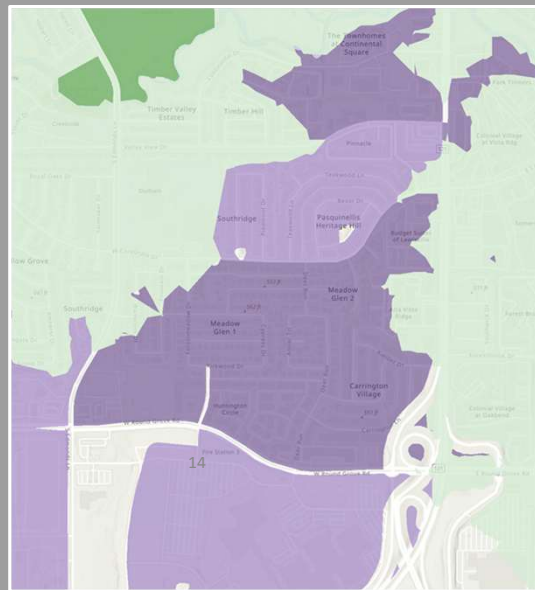
PROPERTY	LAPS SCORE	10 MWP INCREASE	NEW RESIDENTS	POTENTIAL	NOTES
McDaniel Property	68%	<0.01	8	Expansion of Railroad Park	Owner not interested in sale; partnership potential



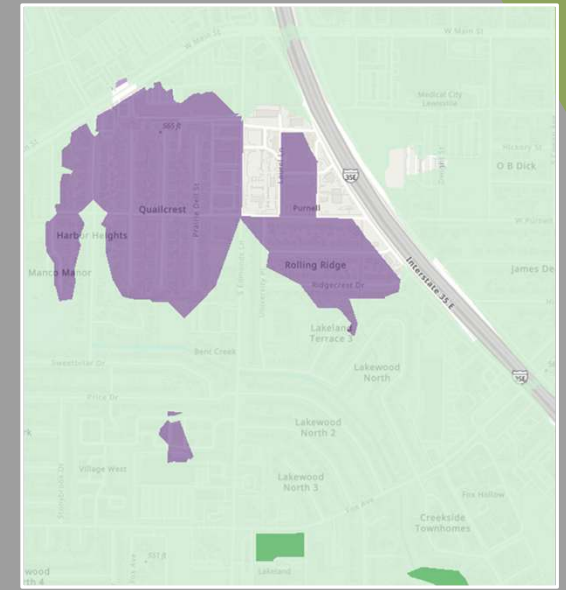
# Three Priority Park Deserts



Vista Ridge Estates  
Neighborhood



Meadows Neighborhood

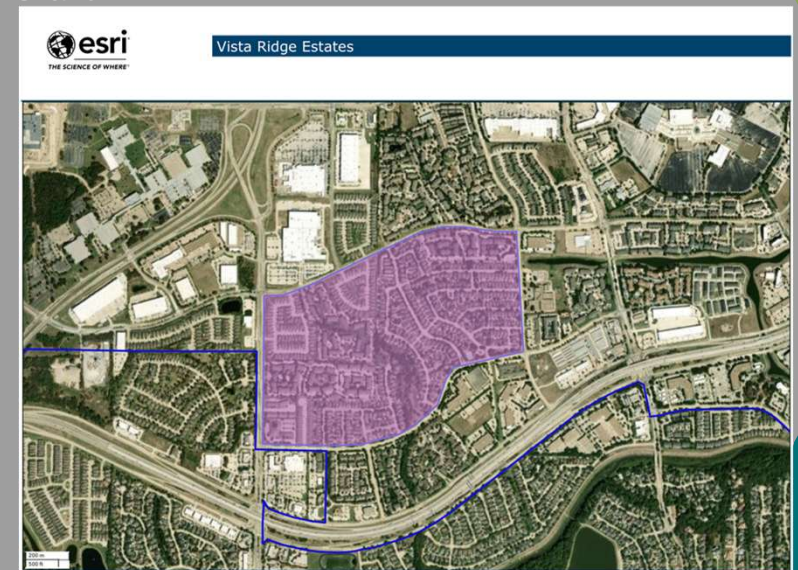


North Edmonds Neighborhood



# Vista Ridge Estates Neighborhood

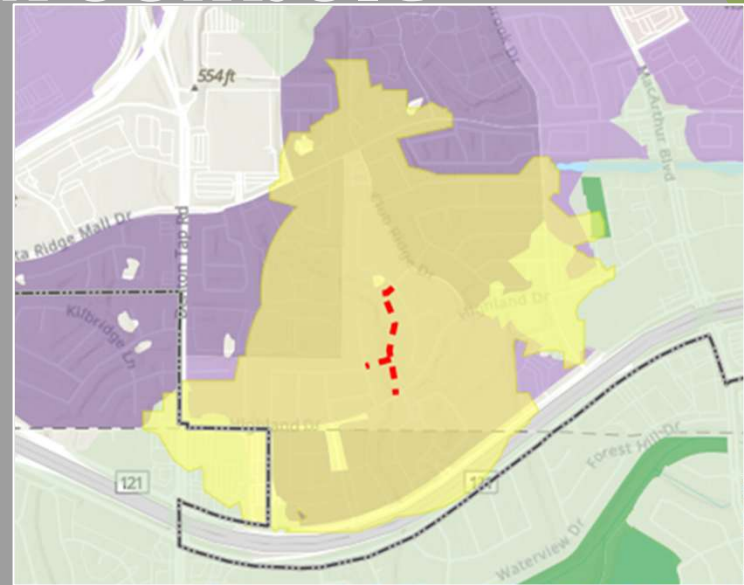
- Vista Ridge Mall Drive, Denton Tap Road, Highland Drive, Rockbrook Drive
  - One of six focus areas in Healthy Infrastructure Plan
  - Focus area for Texas Forest Service Health and Human Equity Grant
- Neighborhood Characteristics
  - Residential
  - 3,563 residents
    - 18.7% < 18 years; 11.4% > 65 years
    - Diversity Index: 81.2
  - Average Household Size: 2.2
  - Median Income: \$115,588
- Nearby City Park Assets
  - Rockbrook Bears Park (LISD School Yard Agreement)
  - Levee Improvement District Trail (Bond 2024 Project)
- Potential Properties for Park Development
  - Limited
  - Small parcels owned and managed by Homeowners Associations or Multi-Family Units
  - City owned drainage parcels





# Vista Ridge Greenbelt

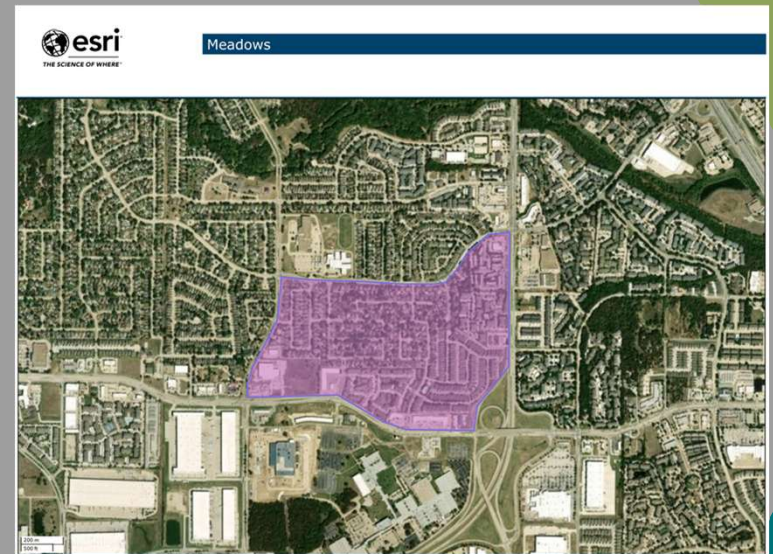
- LAPS Analysis of two parcels
  - 60%
  - 10MWP for 3,442 residents (#### new)
  - Eastern parcel is city owned parcel with existing trail that connect to HOA property
  - Western parcel may be city owned per plat
    - Both parcels maintained by HOA per plat
- Potential improvements to trail, increase tree canopy and prairie grasses, connectivity to residents to the west
  - May require additional agreement with HOA for access





# Meadows Neighborhood

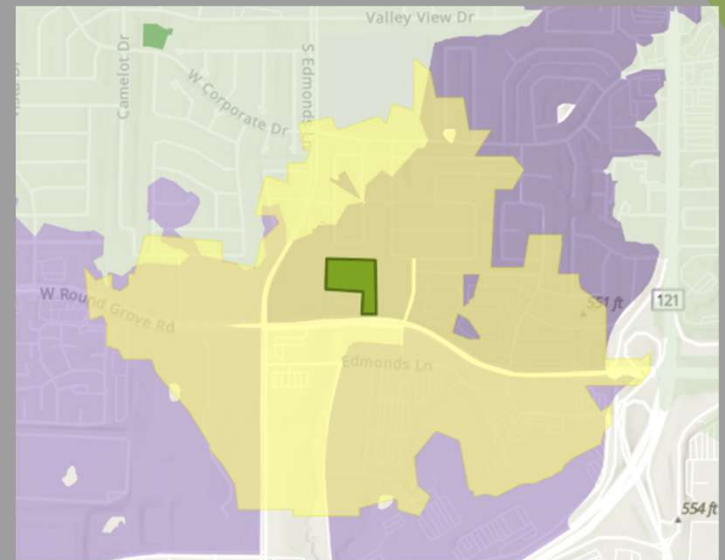
- Corporate Drive, Edmonds Lane, FM 3040/Round Grove Road, SH-121
- Neighborhood Characteristics
  - Residential and Commercial
  - 1,860 residents
    - 23.5% < 18 years; 8.7% > 65 years
    - Diversity Index: 86
  - Average Household Size: 2.77
  - Median Income: \$79,483
- Nearby City Park Assets
  - Southridge Rockets Park (LISD School Yard Agreement)
    - Improved access for northern portion of area
- Potential Properties for Park Development
  - Extremely Limited
  - Small parcels owned and managed by Homeowners Associations or Multi-Family Units
  - Commercial or church properties





# Meadows Property LAPS

- LAPS Analysis of commercial parcels
  - 48%
  - 10MWP
    - 2,729 residents (2,382 new)
      - some picked up by Southridge Rockets Park
  - Limitations
    - Not listed for sale
    - Access not ideal due to alleyways and FM 3040
    - Adjacent development plans unknown
- Potential for use agreement
  - Explore usage and access
  - Engage nearby residents
  - Monitor impact of Southridge Rockets Park





# North Edmonds Neighborhood

- Main Street, Surf Avenue, Edmonds Lane, Fox Avenue, IH-35

- Neighborhood Characteristics

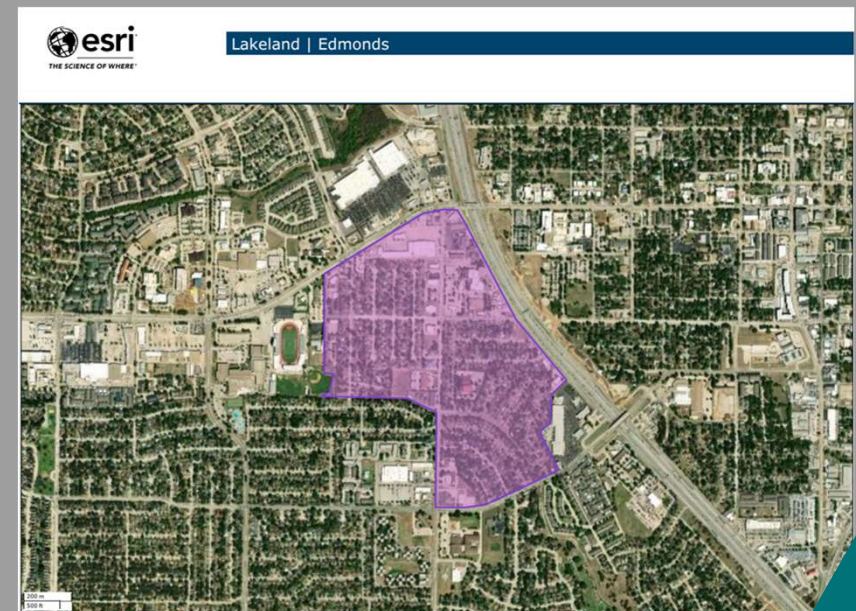
- Residential and Commercial
- 2,000 residents
  - 27.9% < 18 years; 10.3% > 65 years
  - Diversity Index: 86.6
- Average Household Size: 3.34
- Median Income: \$82,094

- Nearby City Park Assets

- Lakeland Ponies Park (LISD School Yard Agreement)<sup>19</sup>
- Raldon Park

- Potential Properties for Park Development

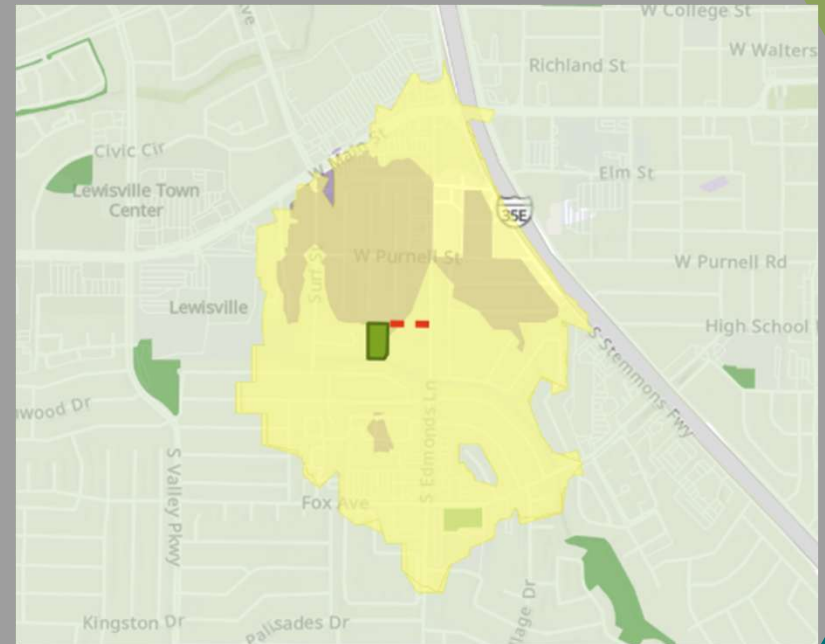
- Limited
- Commercial or church properties
- City owned drainage parcels





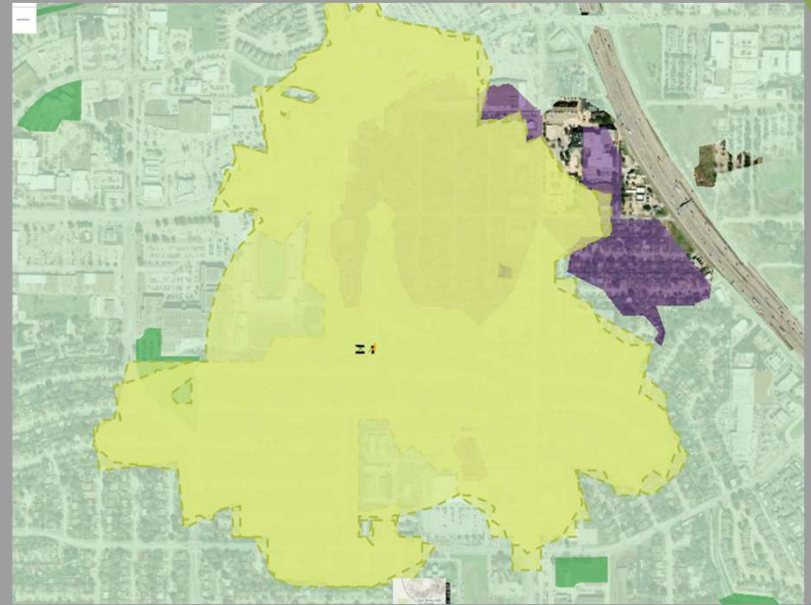
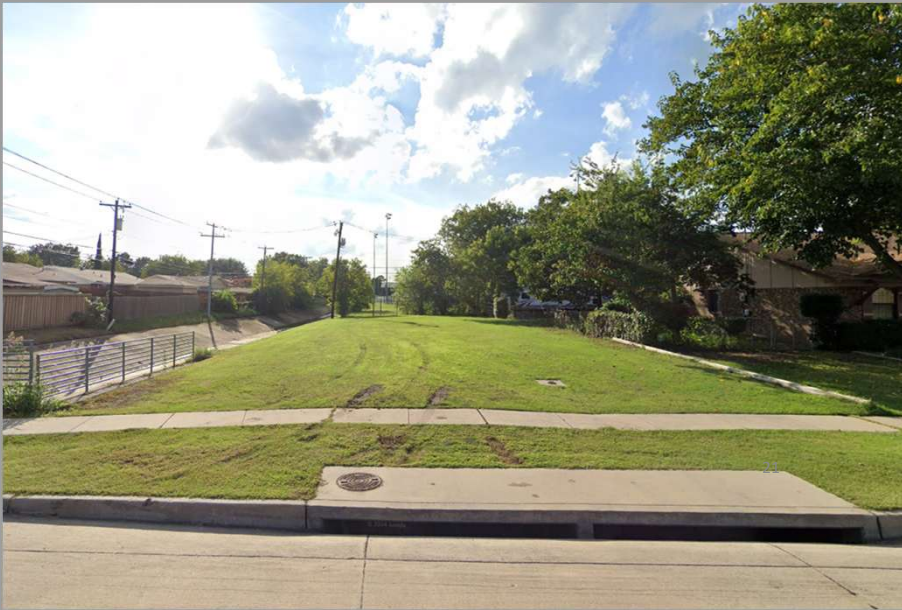
# North Edmonds LAPS

- LAPS Analysis of commercial parcels
  - 15 - 37%
  - 10MWP
    - 2,924 residents (833 new)
      - Some served by Lakeridge Ponies Park
  - Limitations
    - One listed for sale, fronts major road
    - One not listed for sale and no direct access
- Explore other options for development





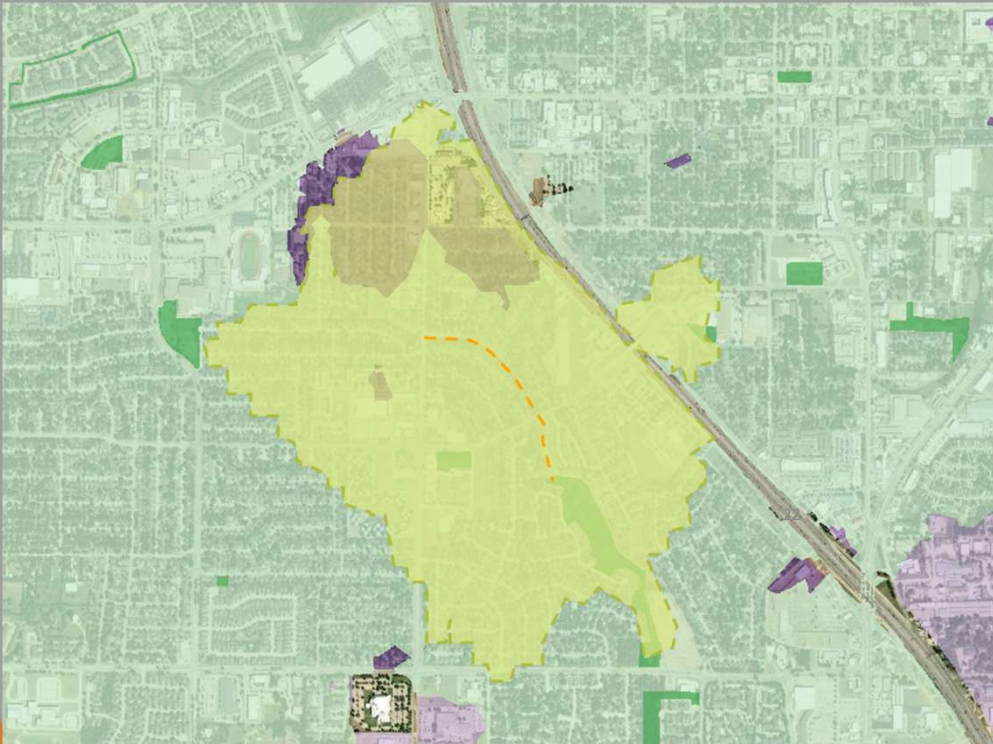
# North Edmonds Existing City Assets



- City Property at 698 Surf Street
- 10 MWP INCREASE
  - 639 New Residents Served
- 0.17 Acres
  - Pocket Park and Trailhead
  - Possible connection to Sun Valley Park via High School



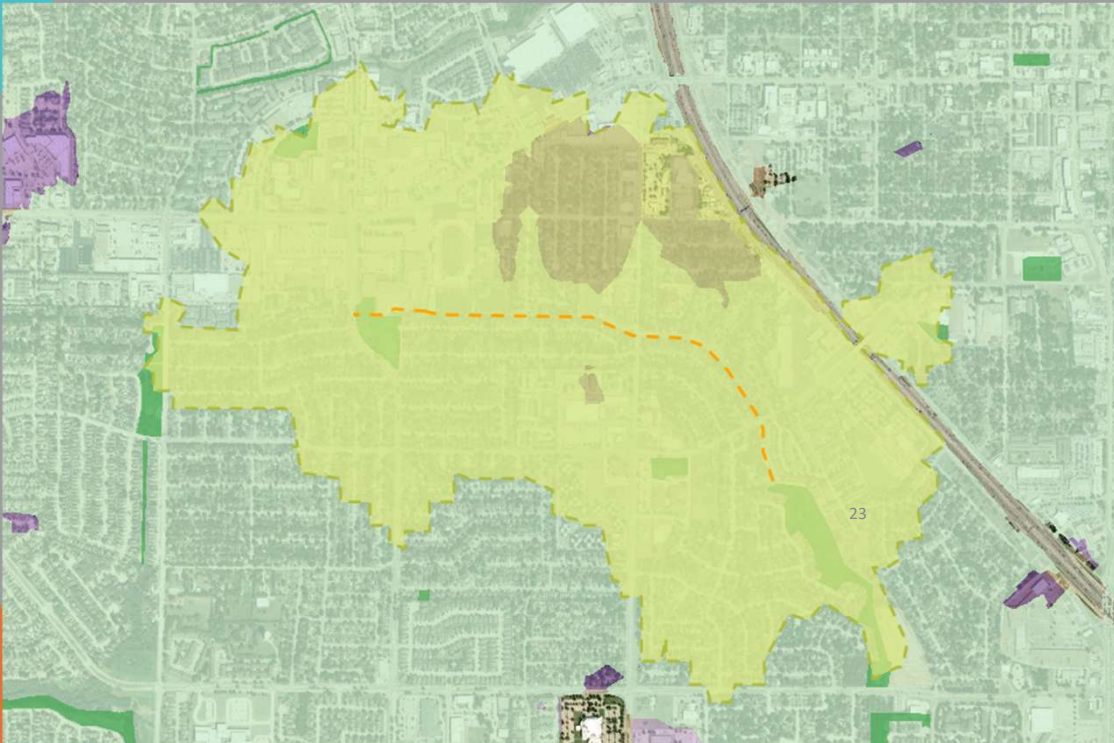
# North Edmonds Existing City Assets



- City Drainage Way
- Possible Trail Development
  - 0.53 miles Trail
  - Enhance connections to
    - Ralston and Lakeland Ponies Parks
    - Commercial areas
- 10 MWP INCREASE
  - 692 New Residents Served
- No Easements required
- Significant engineering required



# North Edmonds Existing City Assets



- City Drainage Way
- Possible Trail Development
  - 1.08 miles Trail
  - Enhance connections to
    - Ralston and Lakeland Ponies Parks
    - Sun Valley Aquatic/Tennis Center
    - Lewisville High School
    - Commercial areas
- 10 MWP INCREASE
  - 844 New Residents Served
- Easements required between Edmonds Lane and Surf Street
- Significant engineering required



# Other Projects to Impact 10MWP

- Timber Creek Trail Extension (aka Centennial Trail)
- DCTA Trail Extension to Southern City Limits with Carrollton
- DCLID Trail near Rockbrook Elementary
- Parkland Dedication and Development
  - Kingwood Estates (near Josey Lane)
  - Solea and Heritage Estates (Valley Parkway)
  - Oakbend and Uecker Developments
- Spinks Warehouse Trails
- Old Town Property Acquisition Opportunities (5MWP for density)



# Next Steps

- **Creekside Elementary School**

- Begin due diligence
- Reach out to LISD regarding potential purchase details

- **LISDOLA Property**

- Monitor interest in property
- Reach out to LISD regarding right of first refusal

- **McDaniel Property**

- Master Plan Railroad Park and McDaniel property for expansion of sport field and trail offerings
  - Identify Railroad Park assets to be upgraded or developed
  - Explore options for development of McDaniel property
- Potentially enter into agreement with McDaniel family



# Next Steps

- **Vista Ridge Estates Neighborhood**
  - Property acquisition/reclassification or easement
  - Potential partnership with HOA
  - Trail and greenbelt enhancements
- **Meadows Neighborhood**
  - Monitor usage of Southridge Rockets Park
  - Consider Access Agreements with Multi-Family and Church Entities
- **North Edmonds Neighborhood**
  - Consider dedications of Surf Street Property as parkland
  - Engagement efforts similar to the Triangle Neighborhood
    - Determine best routes for connecting to existing city assets
- **City-Wide**
  - Continue LAPS Analysis for potential property purchases
  - Enhance tool for measuring viability of partnerships and agreements with other entities



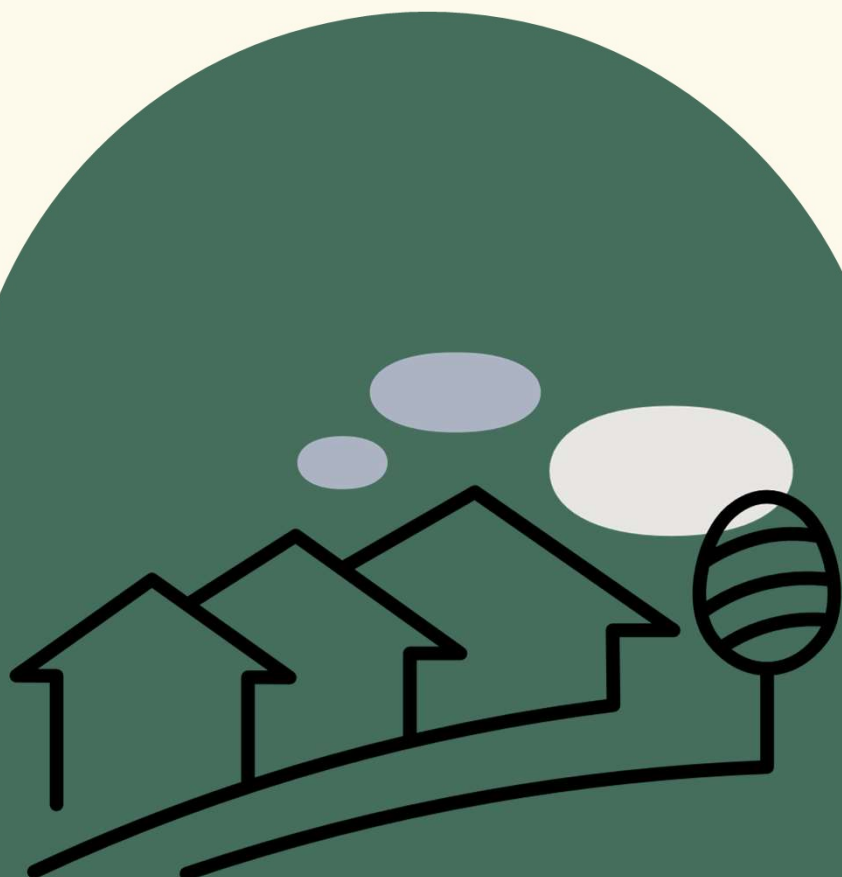
# Discussion | Questions?



# **AFFORDABLE HOUSING COMPARISON, UPDATE AND REHAB RFP**

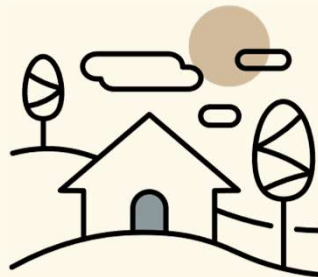
**Neighborhood and Inspection Services,  
Economic Development, and Grow America, Inc.**

**City Council Retreat  
February 21, 2025**





# HOUSING GAP ANALYSIS AND TOOLKIT



**Housing that is Affordable** - Housing where a household is spending no more than 30% of their gross (i.e. pre-tax) income on housing costs.

**"Affordable Housing" or "Subsidized Housing"** - A housing unit that has been subsidized by a government program so that: (1) the sales price or rental rate for the housing unit is limited to a specific below-market price, and (2) the housing unit is required to be occupied by a low-income household.



# HOMEOWNER WIN FOR HIGHER INCOME HOUSEHOLDS

An evaluation of communities nationally with the below markers found that Lewisville ranked 11th in the Nation and 2nd for Texas communities (behind Canyon Lake at 5th Nationally) as an affordable market for people purchasing homes at or below \$500,000.

- Populations between 25,000 – 200,000
- A 9%+ increase in population from 2020–22
- Average home values under \$500,000 as of 2024



Provides insight into local market following the Gap Analysis completed in 2023, which reflected a gap in homeowner units for households earning 120% AMI + (\$132,360 and over for family of 4).

*Reported in September 2024 by MetroTX Association of Realtors*



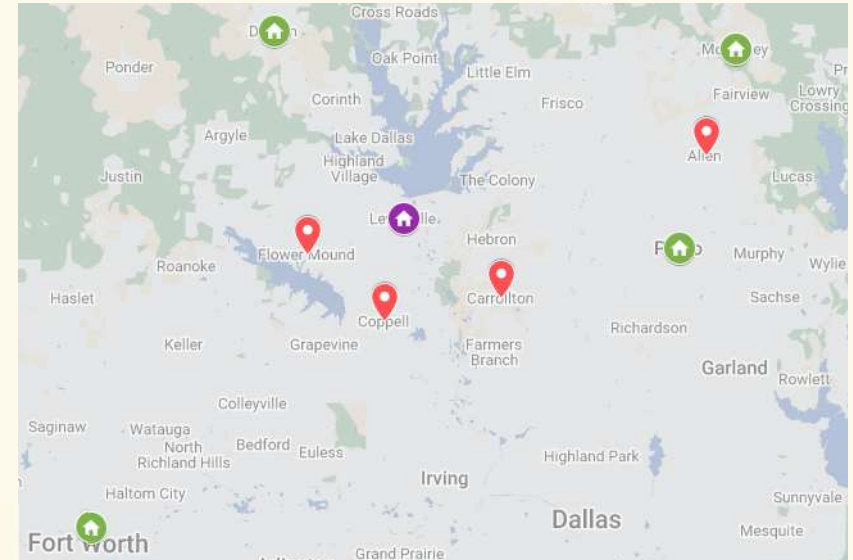


# SURVEY CITY RESULTS

In Summer 2024, The City of Lewisville contacted 17 municipalities (survey cities) with a survey on affordable housing. 8 municipalities responded and provided information on current priorities, programs, and funding.

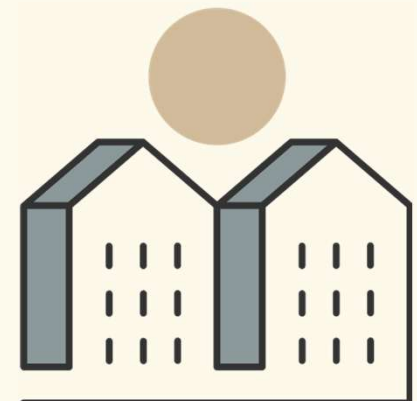
## Is Affordable Housing a Current Priority for your Community?

4 of the 8 municipalities that answered the survey reported it is a priority for their community.



### Key for Map

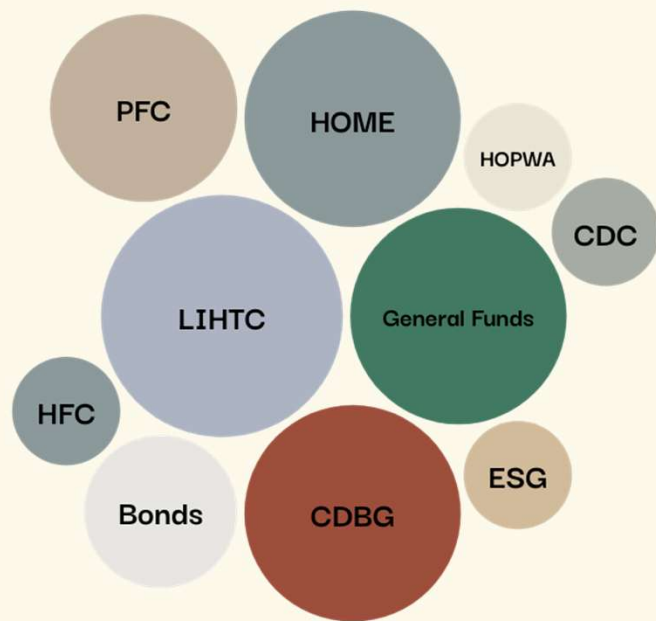
- Priority
- Lewisville, TX
- Not a Priority



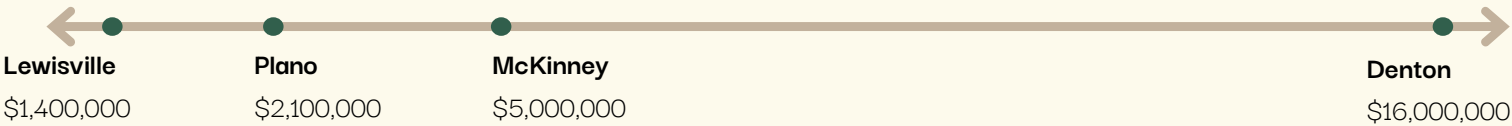


# SURVEY CITY RESULTS

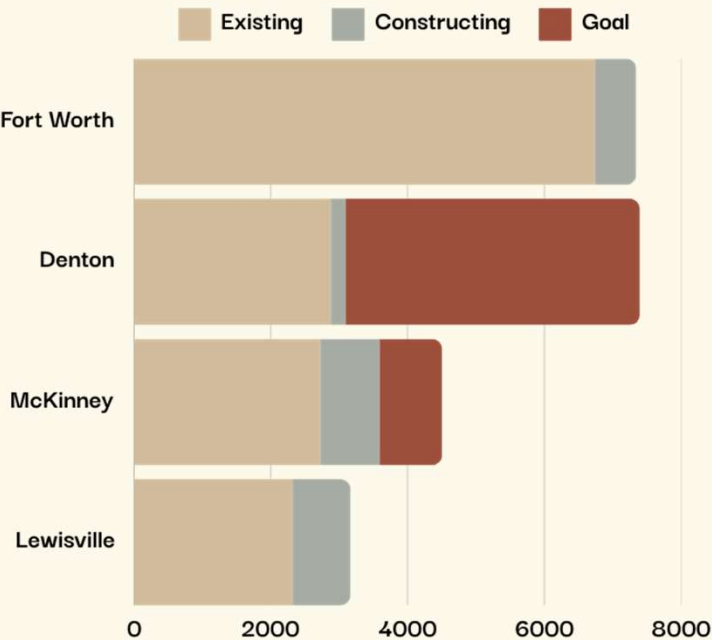
## Affordable Housing Tools (Funding) Being Utilized



## Funding Amounts Allocated (Rounded)



## Housing Units and Goals Reported



Lewisville and Fort Worth do not have a specific goal as we are focused on generally more affordable housing. Plano did not provide data points for these questions.

*Municipalities with Affordable Housing as a Council Priority or Public Details about Efforts Locally Without a Survey Response:*

- Arlington
- Dallas
- Frisco
- Grand Prairie
- Mesquite



# LOCAL PROGRESS

Council approved the Affordable Housing Toolkit in 2023 with the below priorities and strategies. Staff has since deployed or improved programs to meet the strategies identified. Staff has also met with local stakeholders and the Lewisville Housing Collaborative launched November 2024 for quarterly meetings.



## DEVELOPMENT

**Strategy:** Incentivize construction of affordable units through gap financing, PFC deals, and development on city-owned land.

**Step Made:** *Standard at Old Town through PFC*



## ECONOMIC MOBILITY

**Strategy:** Increase homeowner knowledge and purchasing power through down payment assistance, soft second mortgages, and interest rate reductions.

**Step Made:** *First Time Homebuyer Classes*

**Strategy:** Encourage current Lewisville landlords in accepting voucher based programs for future renters.

**Strategy:** Fund local service providers to maintain housing unit availability, pricing, and relationships with landlords to increase housing placement.

**Step Made:** *HOME Funding to DAHC*



## PRESERVATION

**Strategy:** Programming that supports homeowners with financially burdensome repairs in order to remain housed.

**Steps Made:** *PEP, PEP Plus, Code Abatement, & MHRP*

**Strategy:** Supporting proposed LIHTC properties and proactive outreach to current properties about extension of subsidies.

**Steps Made:** *MAP, LIHTC Resolutions*

**Strategy:** Seek property that the PFC can acquire, providing or extending affordability.

**Step Made:** *Standard at Old Town through PFC*

**Strategy:** Conduct outreach on future programming for Manufactured Home Community Residents.

**Steps Made:** *Creekside Pop Up, MHC Playground Equipment*



# Preservation: Apartments

Displacement Concerns	Preservation Opportunities
<p>An apartment community funded by Low Income Tax Credits (LIHTC) may exit the program at the end of the 30-year compliance period and be converted to market-rate housing (via acquisition or demolition).</p>	<p>Proactively contact the owners of LIHTC properties that will be exiting the program within the next 5 years. Seek to acquire the properties through a PFC/HFC partnership or incentivize a new round of Housing Tax Credit investment through targeted economic development incentives.</p>
<p>An aging apartment community with deferred maintenance or weak property management may become a value-add acquisition target. The new owner may seek to evict tenants before making repairs or may raise rents substantially after making repairs, which may lead to displacement of low- and moderate-income tenants.</p>	<p>Create a process to identify vulnerable properties. Seek to acquire the properties through a PFC/HFC partnership or incentivize Housing Tax Credit Investment through targeted economic development incentives.</p>
<p>Multifamily apartment communities with short-term, floating-rate loans may be subject to foreclosure because they cannot obtain suitable refinancing due to tightened commercial lending standards and high interest rates. REO properties may not be maintained or managed well during lender ownership.</p>	<p>Create a process to identify vulnerable properties. Seek to acquire the properties through a PFC/HFC partnership or incentivize Housing Tax Credit Investment through targeted economic development incentives.</p>
<p>Apartment communities with local ownership/management may sell to corporate owners who are less willing to work with struggling renters.</p>	<p>Maintain regular communication with high-quality landlords. Provide loans or grants to existing owners who may need funding for repairs/improvements.</p>



# STRUCTURE & GOALS OF THE NOFA

<b>Key Elements</b>	Proposed projects must include substantial rehabilitation of rental housing units. Upon completion, at least 51% of units must be leased at affordable rental rates for at least 15 years.
<b>Alignment with Housing Toolkit &amp; Other City Priorities</b>	<p><b>Housing Toolkit:</b> The program serves to <b>preserve</b> existing housing units.</p> <p><b>Lewisville 2025:</b> The program helps achieve an objective of the "Diverse and Thriving Neighborhoods" initiative to make all neighborhoods sustainable and desirable and the "Economic Vitality" initiative to support a mix of housing types for those who work and live in Lewisville.</p>
<b>Timing</b>	NOFA will be released in March and will remain open for at least 90 days to allow prospective applicants to identify sites and submit an application.
<b>Outreach</b>	Key points were shared with the newly-formed Lewisville Housing Collaborative and with experienced developers. Pre-proposal meeting(s) will be held after the NOFA is released.
<b>Successful Applicant</b>	The successful applicant will likely be an experienced 4% housing tax credit developer who has successfully acquired and rehabbed projects in the DFW metroplex.
<b>Risks</b>	Risks include: A lack of willing multifamily sellers; rehab costs are so high that the project isn't financially feasible, even with City funding; changes to federal housing or taxation policy negatively impact financing costs.

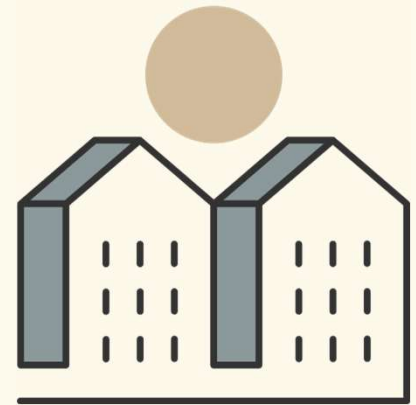




# Summary of NOFA

**Lewisville's NOFA will require that all Projects meet the following criteria:**

- Involve substantial rehabilitation
- 51% units affordable within affordability requirements
- Affordability period of at least 15 years
- Have a City-approved relocation plan



## **Pertinent Definitions:**

- Affordable Housing Units – housing units that are restricted for rent to households earning 80% or less of Dallas Area HUD FMR Area Median Income and that charge Affordable Rents.
- Affordable Rent – a contract rent (base rent plus utility allowances plus mandatory fees) that is equal to or less than the maximum rent for the household size, unit type, and the proposed funding source(s) as designated by the City.
  - Additional Rent Requirements – The City will award 0 out of 15 possible points for Projects that propose initial rents for affordable units that are higher than the rent currently charged for those units. Proposals must also demonstrate that the affordable rents are at least 15% lower than market rents.
- Substantial Rehabilitation – a scope of work that will substantially improve the interiors of all units and exterior deferred maintenance, and meet the following minimum rehabilitation amounts:
  - For Projects less than 20 years old, the Rehabilitation must involve at least \$20,000 per unit in Building Costs and Site Work.
  - For Projects greater than or equal to 20 years old, the Rehabilitation must involve at least \$30,000 per Unit in Building Costs and Site Work."



# Summary of NOFA



## **City will Prioritize Projects:**

- 15-year affordability maintained by owner
- Units reserved for households at or below 60% AMI
- Significant energy efficiency, resiliency, and/or accessibility upgrades
- Tenant-needs based relocation plan with tenant input



## **Funding:**

- The City estimates providing a grant or deferred loan in the amount of \$750,000 in funding that is available to be awarded pursuant to the NOFA.
  - Home Investment Partnerships (HOME) Program - \$350,000 (Estimated amount for FY25-26)
  - Community Development Block Grant (CDBG) Program - \$100,000 (Estimated amount for FY25-26)
  - City of Lewisville General Fund - \$300,000 (approved in FY24-25 budget)



## **Scoring & Selection:**

- 100-point scale; 80-point minimum for interview
- Scoring categories: Experience, Leveraging, Rehabilitation/Ownership, Affordability
- Interviews & potential third-party underwriting



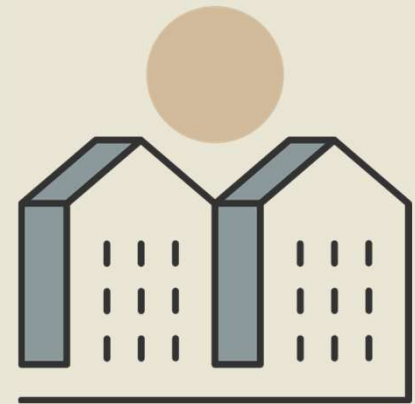
## **Required Documentation:**

- Proposals will need to include, Narrative, Timeline, Budget, 20-year Proforma, Sources & Uses, Disclosures, Team Bios/Resumes
- Site control, appraisal, bids, rent roll, financing, and financials NOT required at application, but will be required during underwriting (if the Proposal achieves at least the minimum score and after the interview).



# DISCUSSION QUESTIONS

- Do you agree with the City's funding priorities? Do you recommend that any priorities be added or that existing priorities be modified/removed?
  - Do you think that affordable units should be limited to serving 60% AMI households rather than 80% AMI households? Or should affordable units be allowed to serve higher incomes, such as 100% AMI or 120% AMI?
  - Do you think that the minimum affordability period should be longer?
- Do you agree with how the City is defining Substantial Rehabilitation?
- The City will require the Developer to follow an approved relocation plan during the construction period. As part of the relocation plan, the Developer may be required to temporarily relocate tenants to vacant units or to off-site units. Are there any specific requirements that the City should impose (ex. Temporary units must have a kitchen or kitchenette, must be less than 1 mile away, must have same number of bedrooms, etc.)
- Do you have any recommendations regarding how and where the City should advertise this funding opportunity?





# Questions







# Centralized Volunteer Management

Council Retreat

February 21, 2025



# The Value of Volunteerism



Does a strong volunteer program enhance community engagement?



Who benefits from more volunteerism?



What makes volunteers continue to deepen their contributions to the common good and their community?



What makes a volunteer experience meaningful?



# Value Proposition

## Volunteer Perspective

- Make a Tangible Impact
- Build Stronger Community Connections
- Enjoy Personal Fulfillment & Well-being
- Gain Valuable Skills & Experience

## City Perspective

- Enhance Community Engagement & Civic Pride
- Stronger Partnerships & Cross-Sector Collaboration
- Expanded Service Capacity at Minimal Cost



# The Volunteer Experience



## Positive volunteer experiences

- Tap the skills, talents, and interests of volunteer
- Clear purpose and direction
- Sense of autonomy
- Sense of ownership
- Link to the mission
- Offer hospitality
- Fill an agency or community need
- Fill a volunteer need or goal
- Recognition/appreciation
- Communicate impact
- Organization readiness – volunteers were expected and meaningful tasks were ready for them
- Good pacing of the work

## Poor volunteer experiences

- Expected too much or too little of volunteers
- Sense of being taken advantage of
- Lack of communication
- Lack of appreciation
- Did not engage volunteer skills and talents
- Did not match volunteer skills to agency needs
- Savior complex on the part of the volunteers or fostered by the agency
- Lack of connection to mission and/or other volunteers
- Unclear mission
- Felt like a token – recruited to check a box rather than for what they had to offer

Credit: Sue Carter Kahl @ <https://www.volunteercommons.com/2024/10/25/to-feel-of-use-instead-of-feeling-used-in-volunteerism/>



# Our Current State:

- Lewisville Volunteer Website



CITY OF  
LEWISVILLE, TEXAS

ABOUT LEWISVILLEOUR SERVICESCITY HALLTRANSPARENCYFOR BUSINESSHOW DO I

Apply for....  
Contact....  
Pay....  
Register or Sign Up....  
Report or Request...  
View....

How Do I »

## Volunteer Opportunities with the City

Font Size: + - + Share & Bookmark Feedback Print

Volunteers are the heart of successful programs and vital to communities world-wide. Want to do something meaningful in the Lewisville community? Volunteering is the best way to meet people, be a part of your community, and make a difference. City of Lewisville volunteers can get involved by participating in festivals and events, the arts, supporting the library, or helping in the new animal shelter. Whether your passion is raising awareness about city programs and facilities or just raising spirits, there are endless opportunities to get involved.

ANIMAL SERVICES	+
CITY BOARDS & COMMISSIONS	+
LIBRARY	+
KEEP LEWISVILLE BEAUTIFUL	+
LLELA	+
LEWISVILLE GRAND THEATER	+
PARKS & RECREATION	+
POLICE DEPARTMENT	+
SPECIAL EVENTS & FESTIVALS	+
TEEN COURT	5 +



# Current City of Lewisville Volunteer Activity

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Department	Hours/Year	Value	Notes
Parks & Recreation	7,588	\$ 237,580	LLELA & Thrive; also partner with Texas Master Naturalist
Animal Shelter	3,072	\$ 96,184	Approximately 30 regular monthly volunteers
Library	1,000	\$ 31,310	Approximately 45 regular teen and adult volunteers
Neighborhood Services	800	\$ 25,048	Approximately 200 volunteers @ For The Love event
Teen Court	557	\$ 17,440	Excludes those mandated to attend
Community Relations & Tourism	120	\$ 3,757	Events
Fire	800	\$ 25,048	Reserves

Total 13,937 \$ 436,367



# Volunteerism: Our Current State

- Administrative Burden Placed on Numerous City Staff for initial recruitment, onboarding, training, scheduling
- Recruitment Challenges/Limited Outreach
- Volunteers Struggle to Navigate Opportunities
- Lack of Overall Tracking & Coordination
- Inconsistent Onboarding Processes





# Volunteerism: Our Proposed Future State

## Benefits of Centralization

- Efficiency and effectiveness
- Volunteer Experience
  - Finding opportunities, including those outside of initial interest area
  - Effective communication and program experience
  - Consistency
  - Connectedness





# Volunteerism: Our Proposed Future State

## *Centralized Volunteer Management*

### Community Engagement

- Host and attend community information sessions to educate residents about volunteer opportunities.
- Collaborate with schools, universities, and youth programs to engage students in civic service.
- Strengthen ties with faith-based groups, nonprofits, and neighborhood associations to expand outreach.
- Creates partnerships with senior centers and veterans' organizations to involve diverse volunteer groups.

### Active Recruitment

- Leverage social media, email campaigns, and city websites to share volunteer needs.
- Creates a centralized volunteer database to quickly mobilize individuals when needed.
- Provides clear onboarding and flexible opportunities to accommodate different schedules and abilities.

### Volunteer Retention & Engagement

- Match volunteers to opportunities that meet their needs.
- Offering training workshops and skill-building sessions to keep volunteers engaged.
- Conducting surveys and feedback sessions to improve the volunteer experience.
- Regularly communicates with volunteers to ensure they feel valued and informed about new opportunities.



# Best Practices In Volunteer Engagement





# Examples



## Plano

6,619 volunteers

76,674 hours

\$2.4 million value



## Boulder

4,104 volunteers

54,440 hours

\$3 million value



## Frisco

1,560 volunteers

27,323 hours

\$870,000 value



# FY26 Potential Investment

## Software

- Currently the Parks and Recreation Department is pursuing a volunteer management software, intending to select and implement in summer of 2025. Needs include: tracking volunteer opportunities, hours, schedules, communications. Other departments have similar needs. The CRT department currently uses Timecounts.
- Discussions have begun to coordinate efforts
- Possible solutions at a variety of prices:
  - Better Impact (Grand Prairie, Frisco)
  - Volly (LISD, McKinney events)
  - Timecounts (Lewisville events)
  - Galaxy Digital (Denton, Fort Worth)
  - GivePulse (Boulder)
- Annual recurring cost of \$5,000-\$25,000
- Current budget of \$6,000/yr

## Position and role

- Volunteer Coordinator
- Overall program coordination including technology management, program planning and support, effective volunteer recruiting and onboarding, process improvement, tracking, and growing community partnerships. This position will measure program success while supporting, convening, and aligning the various staff managing volunteer activities throughout the City.
- Salary \$61,345; full cost of \$92,990





# Questions & Discussion







# CoCare

Brook Rollins, Chief of Police

Mark McNeal, Fire Chief



# Objective

---

- CoCare History
- Authorized Positions
- CoCare Mission
- Data & Challenges
- Area Comparison
- Looking Ahead





# CoCare History

---

- Listen, Learn, Lead (2020) – Recommendation #13
  - *As part of the annual budget process, review emerging trends and explore options for alternative response to certain types of police calls through civilian personnel trained in mental health specializations, specially trained police personnel, or partnerships with community service agencies.*
- Community Caretaking (CoCare) Unit
  - Presented to Council on March 13, 2021 (Retreat)
  - Field response format with some follow-up service
  - Daily staffing, one 12-hour shift (10 AM – 10 PM)
  - Council directed CoCare to begin right away, in June 2021, instead of waiting for October 2021 (budget). Staffing included:
    - 2 LPD police officers
    - 1 LFD firefighter/paramedic who was also a certified police officer\* (2 additional LFD certified police officers added in 2022)
    - 1 MHMR clinician (approved by Council on February 7, 2022)
- Serve Lewisville
  - Approved by Council on July 18, 2022
  - Construction 2022-2023
  - Opened with CoCare in November 2023
  - Occupants: MHMR of Tarrant County, Blue Door Market Pantry (Boys & Girls Club), Single Parent Advocates, Boys & Girls Club

\*Police officers are necessary because they have legal authority to detain a person on a Notification of Emergency Detention (involuntary)



# CoCare Authorized Positions

## Police Department

2 Police Officers  
(1 Vacancy)

## Fire Department

3  
FF/Paramedic/Arson  
Investigators  
(1 Vacancy)







# Fire Department CoCare Positions

- One CoCare position per shift
  - Firefighter/Paramedic
  - Arson Investigator (Peace Officer)
- Served dual roles:
  - CoCare
  - Investigations
    - Fire
    - Background
- Vehicle was funded as part of the program



# CoCare Mission

- Original concept was a field response team that would address calls for service (CFS) involving mental health crises. 4 goals were planned:
  - Reduce CFS for LPD/LFD
  - Connect consumers to necessary MH care
  - Build relationships with MH community
  - Focus on field-response to increase CoCare on-scene care
- After CoCare began, challenges emerged (briefed to Council on October 2, 2023):
  - Relationship building/partnerships was important
  - Proactive care to prevent future 911 use was key
  - CoCare cannot be at every MH call, unrealistic expectation
  - Documentation issues noted
  - MHMR clinician resigned
  - Conclusion: Follow-up care is more valuable than originally theorized; field response is unsustainable



# CoCare Data & Challenges

## Productivity Measurements Not Established

- There is no metric to track success (hours, calls, persons)

## CFS Data Collection Challenges

- CAD does not have a tracking component
- Resulted in manual data counting and tracking

## CAD/RMS Implementation

- New CAD/RMS data conversion is still in progress; data is migrating to the new system
- Until full migration, data analytics are not automated

## Lack of Tracking of Repeat CFS, Locations, and/or Consumers

- No formal system exists



# Mental Health-Related Calls for Service

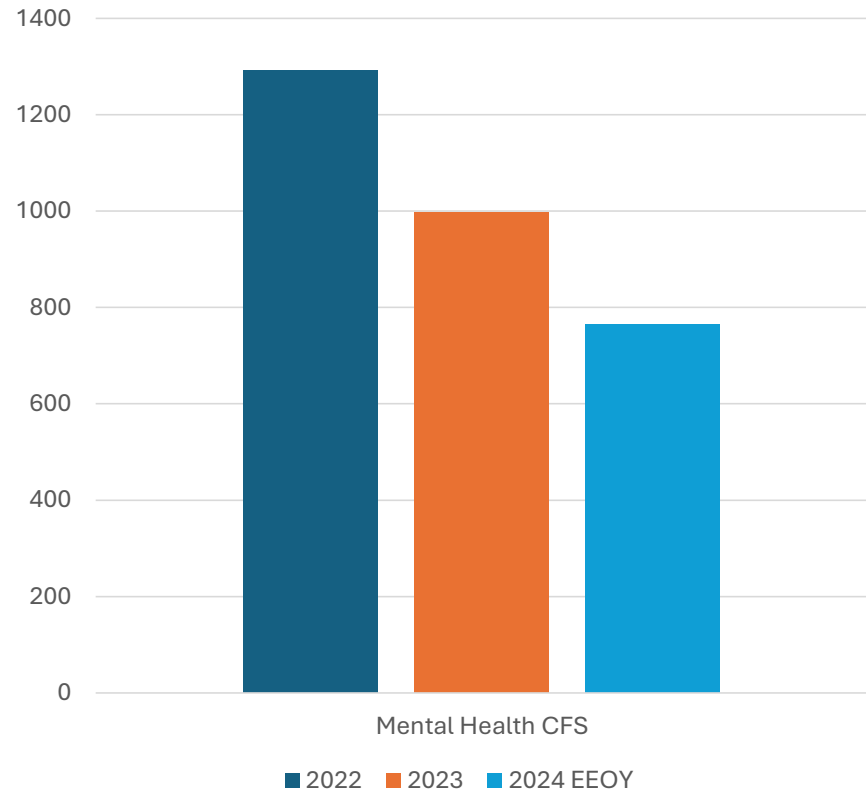


Total calls for  
service involving  
LPD and/or LFD

2022 = 1,291  
2023 = 997  
2024 *EEOY* = 765  
• (Jan-Sept) = 573

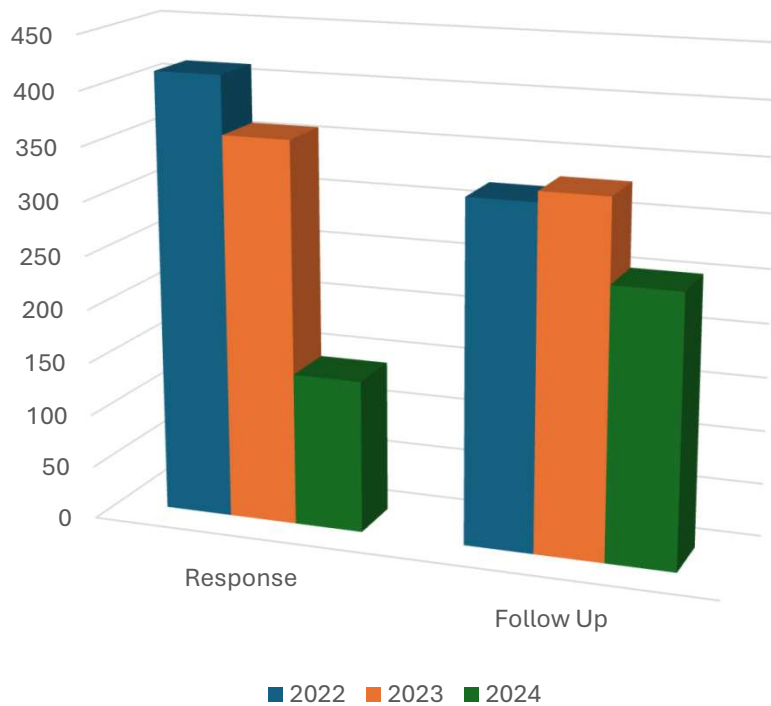


Overall decrease of 41%





# CoCare Performance Metrics



## Field Response

2022 = 412

2023 = 363

2024 EEOY = 143

• Jan-Sept = 107



## Follow-Up Care

2022 = 320

2023 = 330

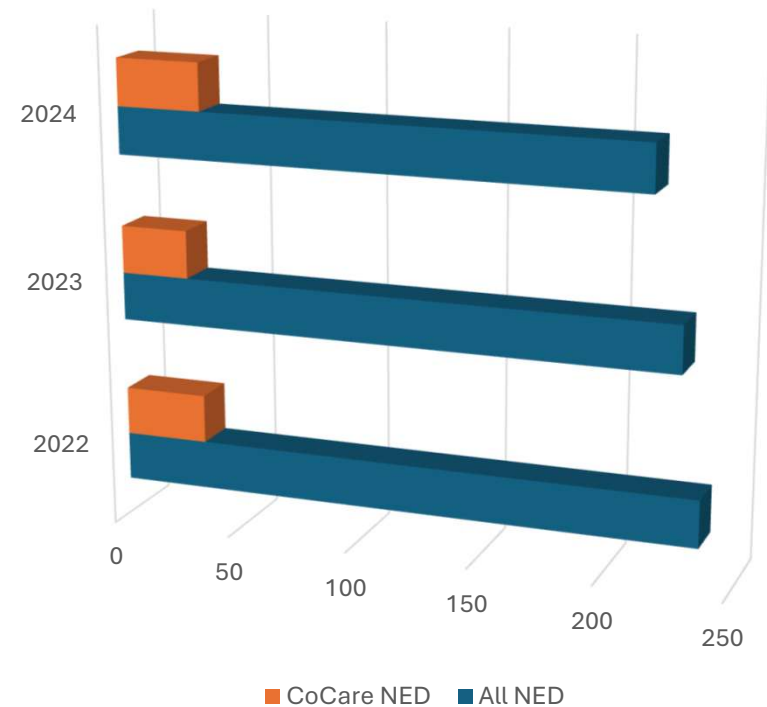
2024 EEOY = 253

• Jan-Sept = 190



# Mental Health Treatment

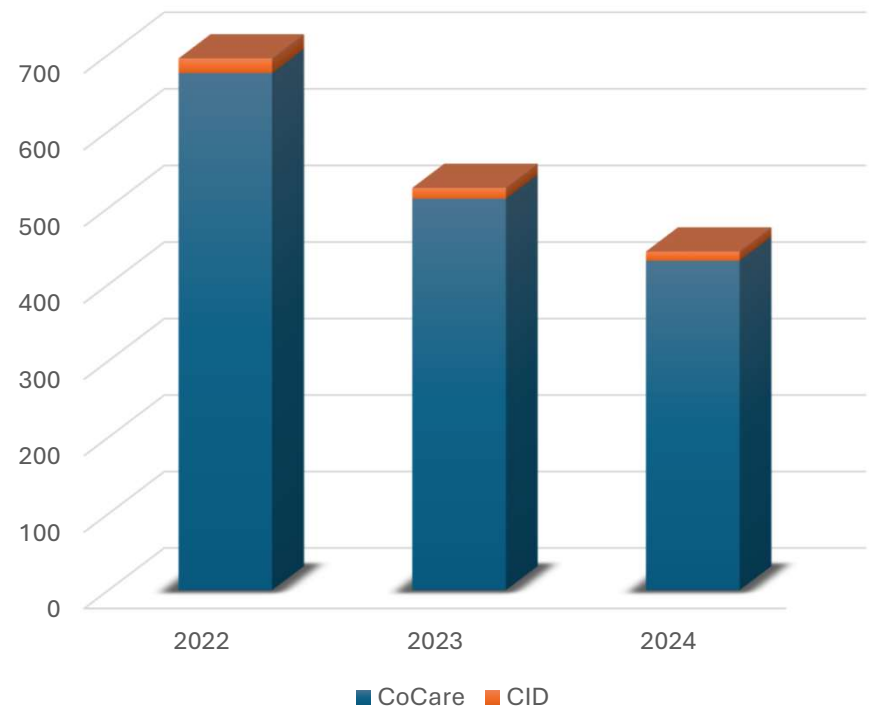
- Transport to a facility with an Emergency Detention Order (EDO)
  - 2022 = 237
  - 2023 = 229
  - 2024 EEOY = 217  
Jan-Sept = 163
- Transport to a facility with EDO by CoCare
  - 2022 = 34
  - 2023 = 28
  - 2024 EEOY = 35  
Jan-Sept = 26





# CoCare – Case Assigned

- Case Reports – CoCare
  - 2022 = 676
  - 2023 = 512
  - 2024 EEOY = 431  
Jan-Oct = 359
- Case Reports – All Other CID
  - 2022 = 19
  - 2023 = 14
  - 2024 EEOY = 12  
Jan-Oct = 10





# Mental Health Response – Area Comparison

- **Denton County SO**

- 6 Deputies, 4 Clinicians
- Co-responder model ineffective
- Deputies handle in-progress
- Clinicians handle follow-up
- Limited success, most refuse follow up care

- **Denton Police Department**

- 8 Officers, 7 Clinicians, 1 Paramedic
- Officers and Clinicians pair up for field response
- Limited success due to resource constraints

- **Flower Mound PD**

- 1 Officer, 1 Mental Health Coordinator, 6 Collateral-Duty Officers available as needed
- Relationship building with consumers and families to divert future CFS
- Concierge-style approach, frequent check-ins, proactive stance
- CFS have steadily decreased since program inception

**Common thread:** Focusing resources on proactive follow-up ensures longer-term success rather than reactive crisis intervention.



# Future Strategy - LPD

## ✓ Focused, Mission-Driven Team

- Combine NRO & CoCare personnel (6) into one **centralized unit**.
- Three-pronged approach to community impact:
  - **Crime Prevention**
  - **Mental Health Follow-Ups**
  - **Homelessness Outreach.**
- **Geographic Accountability:** 5 Officers assigned by district

## ✓ Stronger Mental Health & Aftercare Support

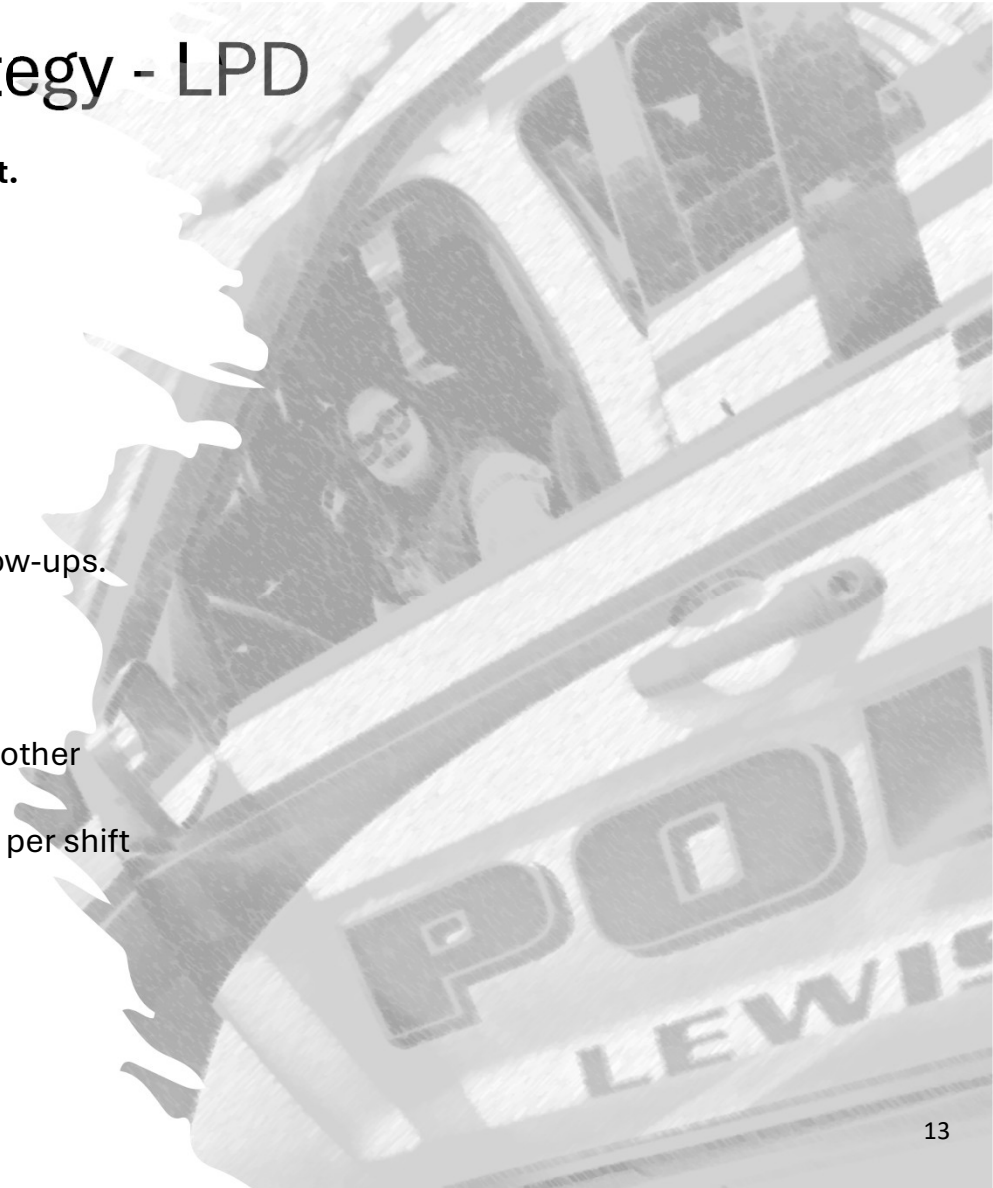
- **1 Officer** dedicated to managing & assigning mental health follow-ups.
- **Proactive approach** to reduce repeat 911 calls.

## ✓ Enhanced Partnerships & Training

- Explore expanded collaboration with **Denton County MHMR** or other non-profit organizations specializing in mental health services.
- Train an additional **8-10 Mental Health Peace Officers (MHPO)** per shift as a collateral-duty assignment.
- **Quarterly training** for NRO, CoCare, and MHPOs.

## ✓ Better Access to CoCare Resources

- Patrol and NRO Officers gain **direct access** to CoCare services.
- **Stronger, more compassionate** intervention.







## Looking Ahead - LFD

### ✓ Engine 6/4 Man Staffing Commitment:

- FY 2024-25 budget included a portion of the funding needed for future staffing needs due to adding Engine 6 and 4 man staffing to Station 8.
- We applied for the 2024 SAFER grant to help fund this initiative, we were not selected as a recipient.
- FY 2025-26 budget proposal will include funding for future staffing. However, the total of 15 firefighters needed is now being reduced to 12 due to reallocating the 3 arson investigators.
- We will apply for the 2025 SAFER grant.
- Arson investigators will continue to conduct investigations while on shift.

### ✓ Vehicle will be reallocated to the Police Department.



## Next Steps:

- ✓ **Standardizing Protocols & Procedures**
  - Develop clear operating procedures for follow-ups and outreach.
  - Align response protocols with best practices and community needs.
- ✓ **Developing Measurable Goals**
  - Define success metrics for crime prevention, mental health follow-ups, and homelessness outreach.
  - Establish tracking and reporting processes.
- ✓ **Staffing & Team Alignment**
  - Assign personnel and finalize team structure.
  - Ensure a smooth transition into refocused roles.
- ✓ **SERVE Lewisville Exploration**



# Driving Success Through Intentional Steps

## Ensure Stability Before Execution

- Roll out changes **strategically**, avoiding rushed transitions.
- Align new processes with **real-time feedback and operational needs**.

## Gradual and Coordinated Implementation

- Regularly assess progress and make **data-driven improvements**.
- Adjust strategies based on **community and officer feedback**.

## Maintain Status Quo Until Strategic Action Items Complete

- Focus on **building a strong framework** before full-scale implementation.
- Ensure all **personnel, policies, and partnerships** are fully aligned.









# Lewisville Urban Forestry Progress

City Council Retreat | Feb 2025





# TABLE OF CONTENTS

- 1 Background and Goals
- 2 Urban Forestry Management
- 3 Technology and Equipment
- 4 Restoration & Habitat Enhancement
- 5 Community & Communication

.....  
.....





# Plans

- **Healthy Infrastructure Plan**

- Tree Survey
- Site Surveys
- Partners

- **Other Guiding Plans**

- Lewisville 2025
- Green Centerpiece Master Strategy
- Restoration Plans for LLELA and Thrive Nature Park
- Business Plan





# HIP Goals and Objectives

## GOAL 5

Utilize Nature as a  
Centerpiece

## Objective 5.2

Preserve and grow  
the urban tree  
canopy

HIP Action Step	Action Step Description
5.2.1	Protect high value replacement trees
5.2.2	Protect riparian forest buffers surrounding riverine features
5.2.3	Enhance survivability of young stands of native trees
5.2.4	<b>*Create a dataset to prioritize suitable planting areas</b>
5.2.5	Create pocket prairies with trees as centerpieces
5.2.6	Conduct follow up studies to monitor urban forest
5.2.7	Free or low cost trees give-a-ways and education for residents
5.2.8	Use air monitors to help identify and prioritize planting areas
5.2.9	<b>*Establish Urban Forestry Unit</b>
5.2.10	Partner with private development to support urban tree canopy
5.2.11	Build complete streets to improve tree canopy

Lewisville Parks & Recreation







## Urban Tree Management

- Staffing
- Urban Planning
- Tree Management Plans



## Technology & Equipment

- Air Quality
- GIS/Survey/Inventory
- Equipment



## Restoration & Habitat Enhancement

- In-house Projects
- Integrated Environmental Solutions (IES)
- Partners



## Community & Communication

- Centennial Plans
- Community Engagement
- Communication



## **Arbor Day Foundation**

### **Tree Impact on Property Value**

According to the Arbor Day Foundation, trees can increase property values up to 15%.



### **30-Year Tree City USA**

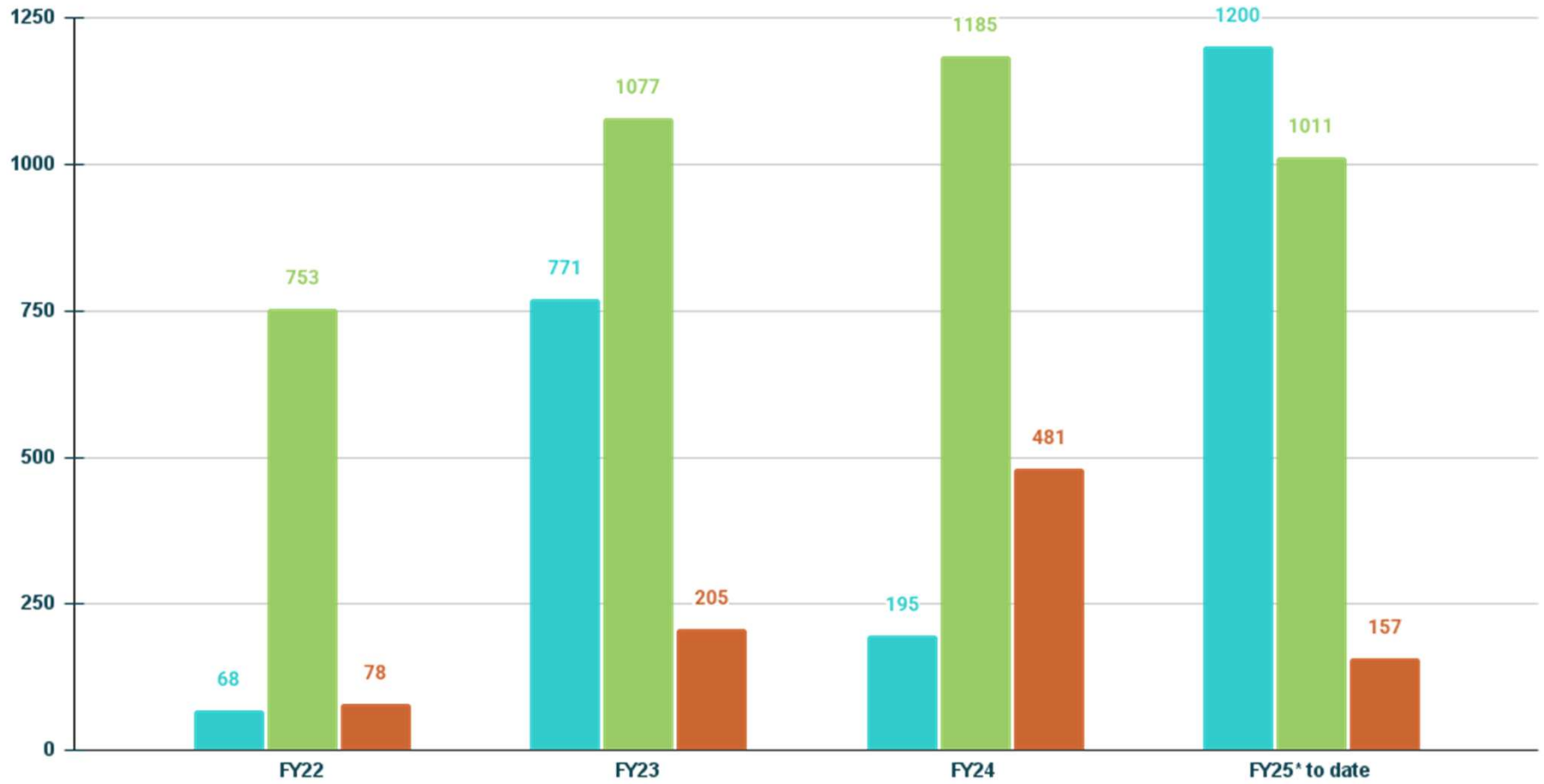
#### **Designation**





## Tree Management by Year

■ Trees planted ■ Trees pruned ■ Trees removed





**Urban  
Tree  
Management**

Louisville Parks & Recreation

The collage features several hexagonal images: a large tree being removed by a skid steer loader; a worker in a bucket truck performing maintenance on a high branch; a close-up of a tree trunk with a yellow measuring tape; a worker planting a new tree; a close-up of a tree trunk with a white sensor; a worker using a chainsaw on a log; a worker in a hard hat and safety vest standing in a field; and a worker using a shovel to plant a tree. The background is white with teal and orange geometric shapes.

■ ■ ■



# Urban Planning

## Complete

UDC – Invasives, Species, Landscaping  
Tree Mitigation Updates

## In Progress

Participate in Development Review  
Texas Forest Service Community Grants

## Forecast

Updates to UDC Regulations  
Park and Development Agreement  
Complete Streets Design

EXHIBIT VIII.3.3-2 APPROVED SHADE TREES

SHADE TREES	
Common Name	Scientific Name
Afghan Pine	<i>Pinus eldarica</i>
American Elm <sup>1,2</sup>	<i>Ulmus americana</i>
Austrian Pine	<i>Pinus nigra</i>
Bald Cypress <sup>1</sup>	<i>Taxodium distichum</i>
Bigelow Oak <sup>1</sup>	<i>Quercus sinuata</i> var. <i>breviloba</i>
Black Hickory <sup>1,2</sup>	<i>Carya texana</i> (aka <i>Carya buckleyi</i> )
Black Locust	<i>Robinia pseudoacacia</i>
Bur Oak <sup>1</sup>	<i>Quercus macrocarpa</i>
Caddo Maple	<i>Acer saccharum</i> "Caddo"
Cedar Elm <sup>1,2</sup>	<i>Ulmus crassifolia</i>
Chinquapin Oak <sup>1</sup>	<i>Quercus muhlenbergii</i>

Non native tree would prefer: Mexican Sycamore, TX Walnut or Black Hickory

Non native prefer Desert Willow

Non native prefer Little Bluestem

Giant Liriope grows up to 3 feet tall

PRELIMINARY PLANS  
THIS DOCUMENT IS FOR REVIEW ONLY  
AND IS NOT TO BE USED FOR BIDDING OR PERMIT PURPOSES  
DATE: 10/18/2024

CRC SOUTH 171

REVISIONS

NO. DATE DESCRIPTION

PLAN INFORMATION

PROJECT NO. BRL24003  
FILENAME BRL24003-TL  
CHECKED BY JL  
DRAWN BY JS  
SCALE 20 SCALE  
DATE 07/03/2024  
SHEET

LANDSCAPE PLAN  
L5.0

PLANT SCHEDULE						
SYM	COMMON NAME	BOTANICAL NAME	CAL	HEIGHT	CONT	CANOPY
TREES						
RO	Shumard Red Oak	<i>Quercus shumardii</i>	3"	10'-12'	PER PLAN	1,256 SF
LO	Southern Live Oak	<i>Quercus virginiana</i>	3"	10'-12'	PER PLAN	1,256 SF
BC	Bald Cypress	<i>Taxodium distichum</i>	3"	10'-12'	PER PLAN	1,256 SF
CE	Cedar Elm	<i>Ulmus crassifolia</i>	3"	10'-12'	PER PLAN	1,256 SF
LE	Lacebark Elm	<i>Ulmus parvifolia</i>	3"	10'-12'	PER PLAN	1,256 SF
ORNAMENTAL TREES						
RB	Eastern Redbud	<i>Cercis canadensis</i>	20 GAL	7'-8'	PER PLAN	314 SF
CT	Chaste Tree	<i>Vitex agnus-castus</i>	20 GAL	7'-8'	MULTI TRUNK	79 SF
SYM	COMMON NAME	BOTANICAL NAME	CONT	HEIGHT	SPREAD	SPACING
SHRUBS						
DB	Dwarf Burford Holly	<i>Ilex cornuta</i> 'Burfordii Nana'	5 gal	30"	3'-0"	36" o.c.
LC	Loropetalum	<i>Loropetalum chinense</i>	3 gal	36"	PER PLAN	48" o.c.
PM	Pink Muhly	<i>Muhlenbergia capillaris</i>	3 gal	18"	3'-0"	36" o.c.
GROUND COVERS						
PB	Prairie Buffalo Grass	<i>Buchloe dactyloides</i> 'Prairie'	Sod			
LG	Giant Liriope	<i>Liriope gigantea</i>	1 gal	6"	8" min	12" o.c.

PRELIMINARY DRAWING - NOT RELEASED FOR CONSTRUCTION



LEWISVILLE  
UNIFIED DEVELOPMENT CODE (UDC)



# Urban Forestry Unit

## Complete

Urban Forester  
Crew Leader



## In Progress

Urban Forestry Intern



## Forecast

Full Crew  
(Planning, management and maintenance)





# Our Team



**Eric D'Antonio**

**Urban Forester**



**Cliff Geske**

**Crew Leader**



**Lauren Castilleja**

**Intern**

Lewisville Parks & Recreation



# Management Plans

## Complete

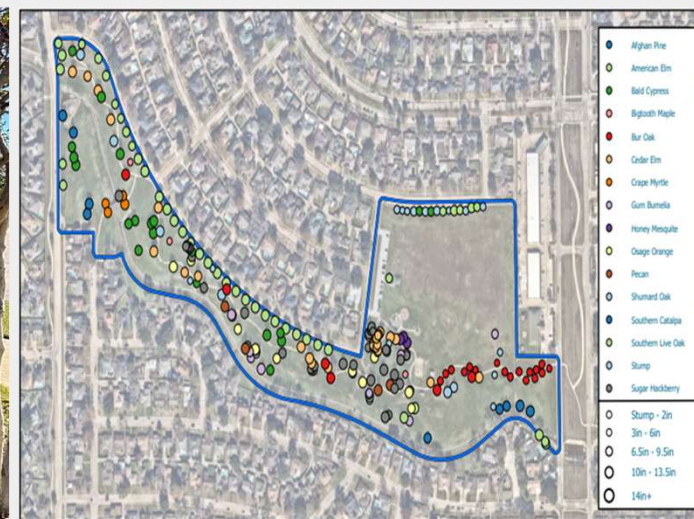
Half Site Surveys

## In Progress

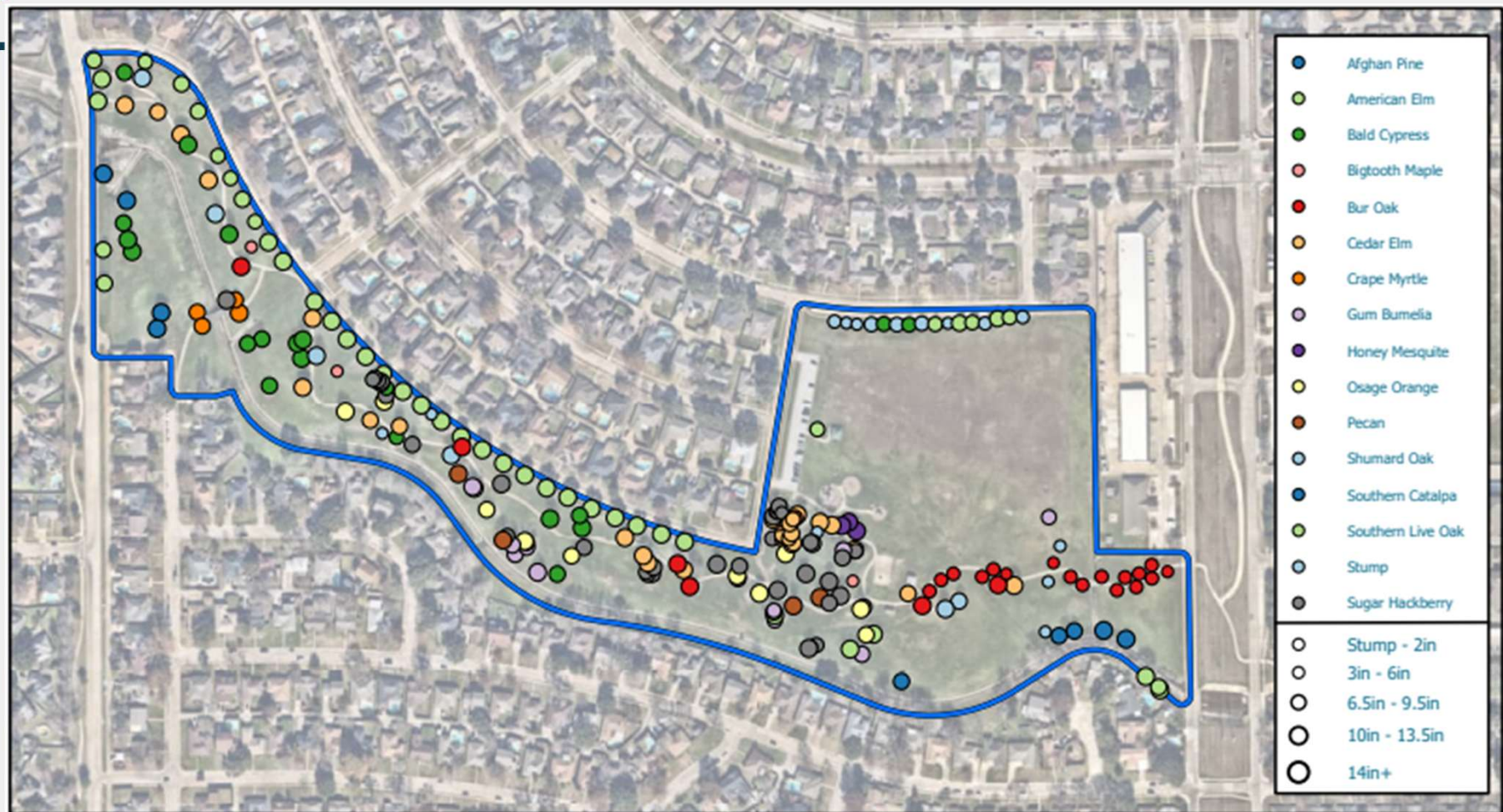
Tree Inventory

## Forecast

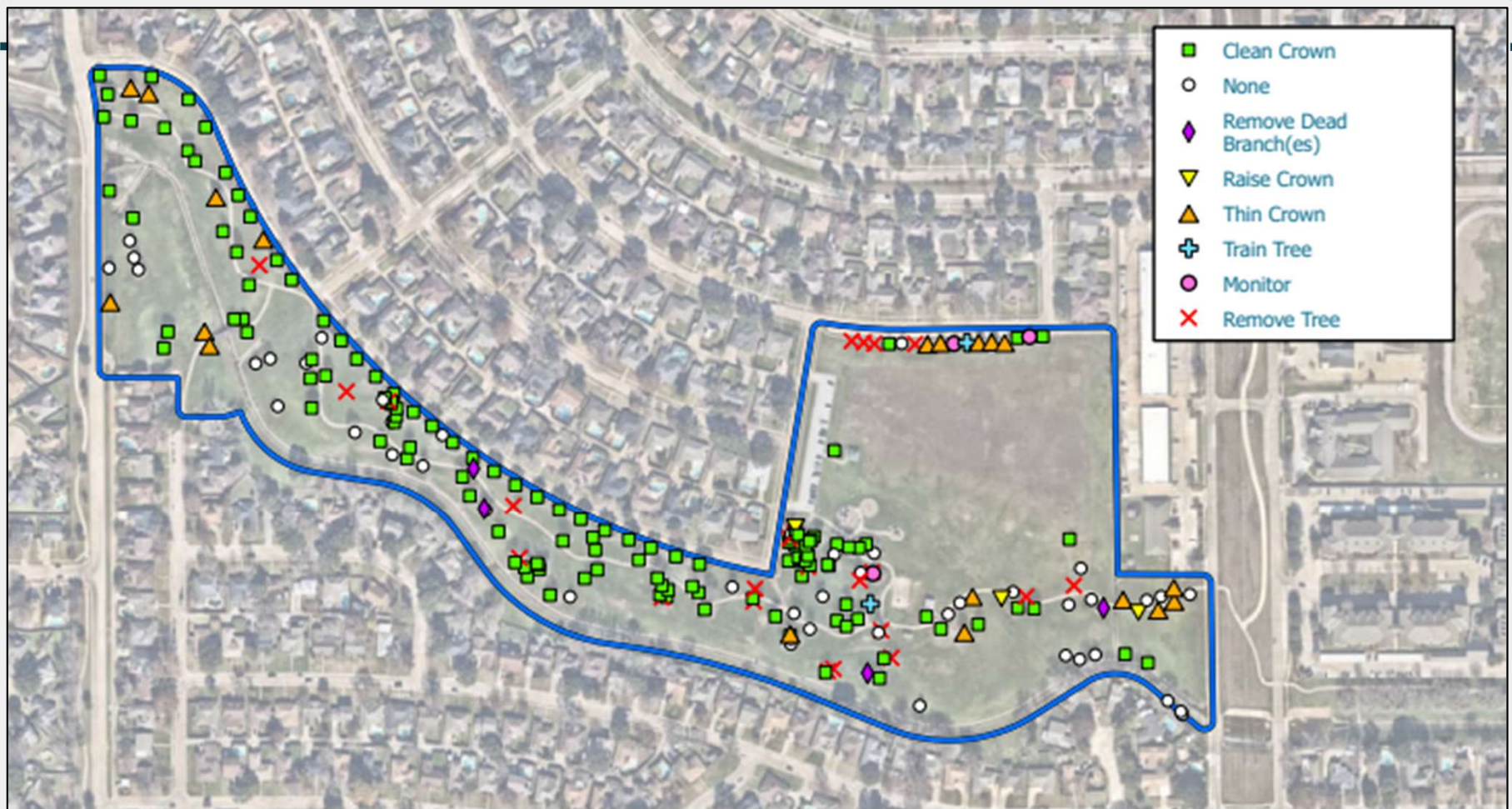
Using surveys/inventory as building blocks to create management plan













[illegible]

# Technology & Equipment

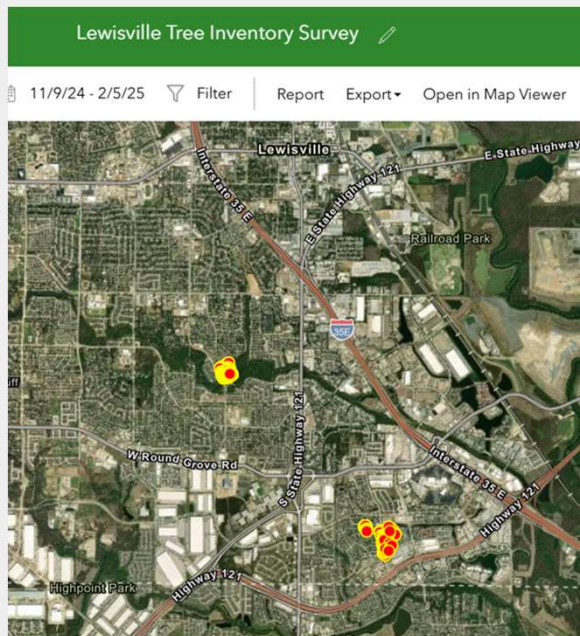
Louisville Parks & Recreation



# GIS/Survey/Inventory

## Complete

Set up ArcGIS Survey 123 for conducting surveys



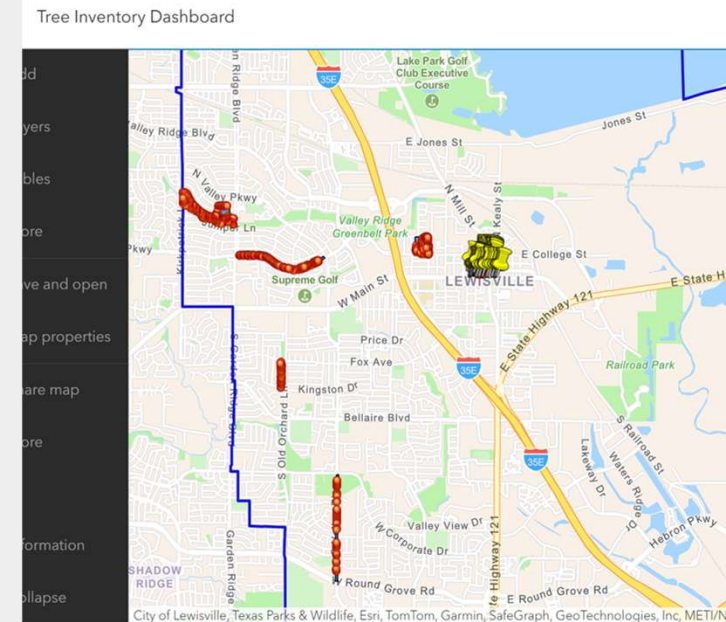
## In Progress

Surveying with assistance of volunteers  
(Citizen Foresters, YAC, TMN, etc.)



## Forecast

Citywide Urban Tree Inventory GIS Dashboard





# Equipment & Software

## Complete

Stump grinder  
Chipper



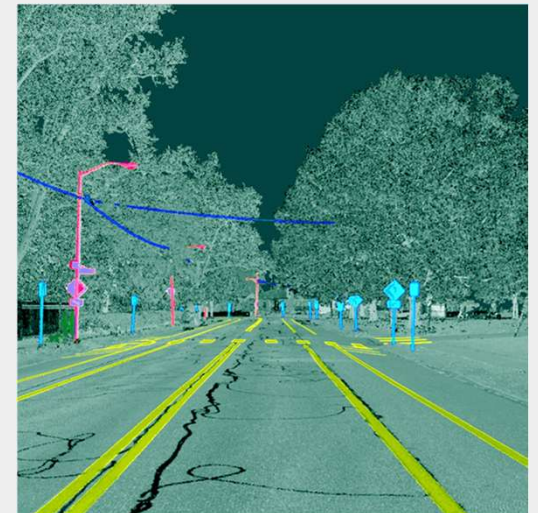
## In Progress

Maintenance  
Vehicles and Equipment



## Forecast

Drone applications  
LIDAR  
Treekeeper





# LIDAR Demo



Lewisville Parks & Recreation



# Air Quality Monitoring

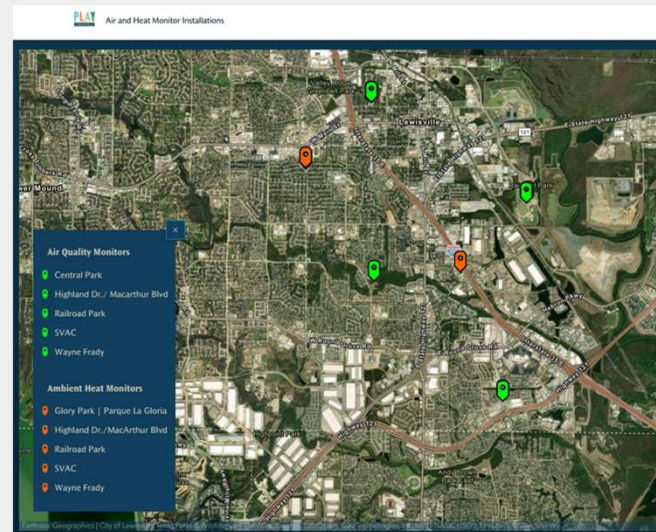
## Complete

H.I.P. baseline data for six neighborhood sites



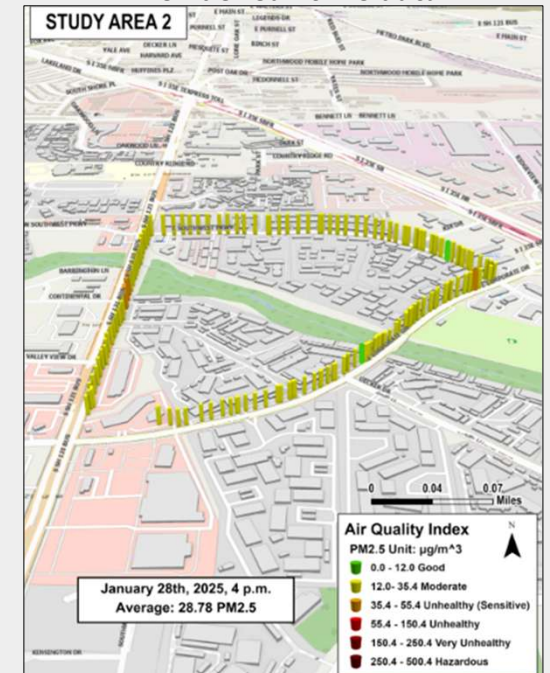
## In Progress

Texas Forest Service Grant Monitoring



## Forecast

Gather data on Tree Impact  
Provide real-time data





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## Glory Park | Parque la Gloria

[Font Size: + -](#) [Share & Bookmark](#) [Feedback](#) [Print](#)

Glory Park | Parque la Gloria is located at 301 E. Southwest Pkwy and opened in June 2024. The park is 2.85 acres in size and introduces residents to the three ecosystems that converge in Lewisville, Blackland Prairie, Cross Timbers Forest, and wetlands. In 2019, the Urban Land Institute (ULI) conducted a National Study Visit to assist the city in developing strategies for overcoming the park desert that existed in the neighborhood. In 2020, Community Development Block Grant (CDBG) funds were allocated for the purchase of the property located at the corner of Southwest Parkway and Kia Drive, which is a private drive. The design of the park was born from the visions drawn at the initial Movement on the Parkway in the Fall of 2019 and continually confirmed/modified after multiple community engagement efforts through Play Lewisville on Wheels activities and subsequent pop-up parks. In addition to driving the design, the residents voted on the name, Glory Park/Parque La Gloria, to honor the rich backgrounds and cultures of the people who live in the neighborhood.

Phase 2 of the project will entail the closure of Kia Drive (a private drive) to through traffic for use by food trucks and maintenance vehicles, as well as a space for special events. A public art piece will also be included in this phase. The department will partner with the Arts Advisory Board to identify an artist for the piece.

### Park amenities include:

- Playground
- Outdoor fitness equipment
- Green space for open play
- Shade structures
- Picnic tables and benches
- Farmers Market area
- Walking trail loop - approximately 0.25 miles
- Outdoor classroom space
- Native trees/plants with interpretive signage

For additional information on this park, please call 972.219.3550.

To report an issue with this park, follow this link: <https://lewisvilletx.citysourced.com/>

On February 4th, 2025, 3:19:13 PM CST

10-minute Average  
US EPA PM2.5  
(AQI) is now

15

0-50: Air quality is satisfactory, and air pollution poses little or no risk with 24 hours of exposure.

Now	10 Min	30 Min	1 hr	6 hr	1 Day	Week
-	15	15	13	9	13	11

Sensor: UNT-GEO-68



**Restoration & Habitat Enhancement**

Louisville Parks & Recreation

The collage features several images: a large excavator working on a dirt mound near trees; a worker in a bucket truck performing maintenance on a high tree branch; a close-up of a tree trunk with a yellow measuring tape; a worker using a chainsaw to cut a log; a worker in a hard hat and safety vest standing in a field with orange survey flags; a close-up of a tree trunk with a white protective cap; and a group of workers planting a young tree in a grassy area.

**Restoration & Habitat Enhancement**

Louisville Parks & Recreation



# Extending the Green

## Complete

Completed pocket prairies  
Green Ribbon Projects



## In Progress

LLELA  
Thrive Nature Park



## Forecast

Future areas within PARD  
Future Green Ribbon and Hebron Pkwy Projects





# Integrated Environmental Solutions (IES)

## Complete

Invasive clearing and planting  
Prairie Creek



## In Progress

Central Park  
Wayne Frady Park



## Forecast

Future areas within PARD  
(Timber Creek, Duwe Properties, Rodeo Grounds)





# Texas Master Naturalists

## Complete

Agreement with COL  
Sustainability in Practice

## In Progress

LLELA  
Extending The Green (RFW, Pollinators)  
Thrive Nature Park

## Forecast

Complete Restoration Plans  
Grow programs (RFW, Education)





[illegible]

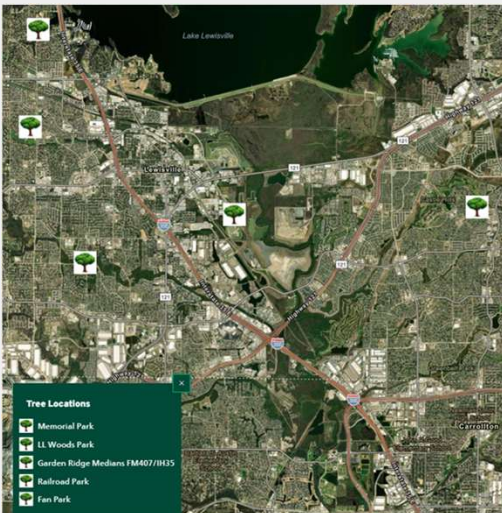
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# Centennial Plans

## Complete

Memorial Tree Planting Program



## In Progress

Service Saturday Volunteer Events  
2,025 Trees



Copyright © Robert O'Brien

## Forecast

Texas Arbor Day Planting  
Residential Tree Program





# Community Engagement

## Complete

Public Presentations  
Tree giveaways  
Tree City USA – 30 Year Designation



## In Progress

Tree Inventory with Citizen Foresters and YAC  
Spring/Fall Tree Plantings  
Tree Giveaways



## Forecast

Roots For Wings for Commercial  
Urban Forestry Webpage





# HIP Action Step Summary

## Action Item Progress



Lewisville Parks & Recreation





# Conclusion



The Lewisville Urban Forestry initiative represents a comprehensive effort to preserve and expand our urban tree canopy, benefiting both the environment and the community. Through targeted actions like data-driven site analysis, the establishment of an urban forestry unit, and the integration of advanced technology, we are on track to achieve our strategic goals.





# Decision Points

- **UDC updates**

- ☐ Consider recommendations from TFS Grant Program best practices
- ☐ Offer Park Development Agreements

- **Residential Tree Enhancement Program**

- ☐ PEP Focus and Expansion
- ☐ Pilot Program

- **Roots for Wings**

- ☐ Expansion for commercial owners



# Questions?





# Retiree Health Insurance

## City Council Retreat

February 21, 2025

Tadd Phillips & Dave Erb



# Background

- Summer of 2023
  - Studied 100% of premiums option – cost prohibitive
  - Pledged to survey 17 cities
- Summer of 2024
  - Shared survey of 17 cities
  - Average net premium for a 20-year retiree with Lewisville was \$974/mo. while the survey city average was \$694/mo.
  - Our retiree rates are calculated each year independently – based only on retiree prior claim experience. Roughly half of cities blend the retiree and employee experience.
  - Many of the other cities possess significant OPEB liability.
  - Pledged to ask actuary to study implications on premiums and long-term liability if we moved completely or partially to the implicitly subsidized standard





Retiree Premiums

City OPEB Liability &  
Annual Contributions

# Valuing Our People In A Fiscally Responsible Way



# Policy Considerations

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- How do we build a policy toward long-tenured employees that reflects the Lewisville Way?
  - Value – We are stronger together because our relationships and diversity create a foundation of commitment and success
  - Serve – We take pride in serving our community through teamwork, communication, and integrity
  - Build - We create positive change, embrace innovation, and develop our people to grow and thrive
- To what level do we want to subsidize retiree cost?
- What's a sustainable approach?





# OPEB Fundamentals

- OPEB – Other Post Employment Benefits
  - Refers to benefits (other than pensions) received after retirement
    - City provides life insurance and health benefits to eligible retirees
  - Benefit creates a liability to be funded pay-as-you-go or pre-funded
  - City established an irrevocable trust to accumulate assets for funding OPEB obligations
    - Plan assets restricted in their use - payment for/reimbursement of benefits
- Actuarial Valuation
  - Performed annually by a certified actuary (Lewis & Ellis)
  - Determines liability size/funding status based on certain benefit level and current plan assets
  - Liability (or asset) is reported on the City's financial statements
  - OPEB Pre-Funding
    - Actuarially Determined Contribution (ADC)
      - Calculated amount needed to adequately fund the plan over time



# OPEB Funding Philosophy

- American Academy of Actuaries – Issue Brief
  - Soundness of a pension or benefit plan
- Key points
  - No single level of funding defines a line between healthy and unhealthy
  - Plans are better evaluated on strategy in place to attain a funded ratio of 100 percent (committing to the full actuarial determined contribution (ADC))
- GFOA “Best Practice”
  - OPEB Governance and Administration – “Commit to the obligation to fund the ADC in full every year, based on the funding plan”
  - Sustainable Funding Practices – Funding policy with a target funded ratio of 100 percent or more (full funding)
- City practice – Contributing annual service cost even when fully funded, improved budgeting and investment performance



# Proposed OPEB Funding Plan

- Plan to minimize impacts from changes to Retiree Health Insurance premium and subsidy
- Increase in long-term liability resulting from any benefit increase
- Utilize reserves to reduce net OPEB liability
- Better than expected claims experience for both Health and Risk Management
  - Growth in fund reserves enables a one-time transfer to reduce OPEB liability
- Previous \$2M Risk Fund transfer to the General Fund
  - Available for future one-time needs
  - Proposed contribution to OPEB Fund



# Proposed OPEB Funding Plan

- Current OPEB Fund adjusted summary balance - \$5,141,545
- Additional contributions proposed for current FY
  - Risk Fund - \$4,353,454
  - Health Fund - \$2,450,611
  - General Fund - \$2,000,000
- Reserves in Risk Fund and Health Fund remain strong post-transfer
- Combined with FY2024 results, no negative impact to GF from transfer
- Total balance available to support OPEB liability - \$13,945,610
- ***Key: Continuing commitment to funding 100% of the ADC***



# Actuarial Review



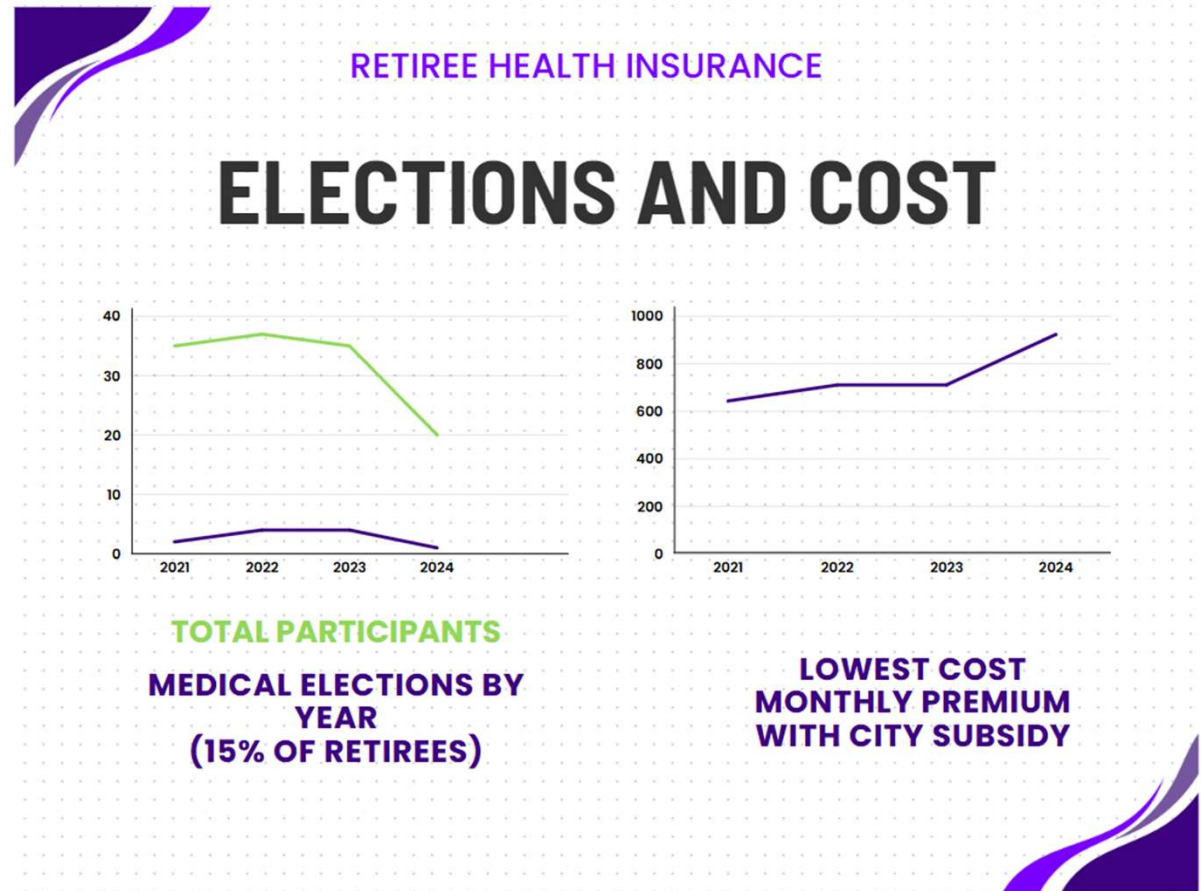
- Lewis & Ellis - Bonnie Albritton, FSA, MAAA. Vice President & Principal
- Analysis starting point – establish calendar 2025 Retiree rates based on experience
- Projected rate increase of 16% - Example:
  - Lowest cost plan 2024 employee-only premium (no subsidy) \$1,474
  - Lowest cost plan 2025\* employee-only premium (no subsidy) \$1,706
- Why? – fewer participants with higher cost experiences

*\*No changes were made to premiums in January 2025 pending this discussion*



# Retiree Health Demographics

- Current impact on retiree
- Cause: segregation of participants
- Options to address issue of increasing costs - higher subsidy, blended rates
- How blended rates “smooth” costs
- Best solution to solve the problem.





# Options Comparison

	2024 Current	Option 1 2025 No Change	Option 2 Direct Subsidy A	Option 3 Direct Subsidy B	Option 4 Blended Active/Retiree	
Plan	Purple Green	Purple Green	Purple Green	Purple Green	Purple Green	
<b>Base Monthly Premium</b>						
Employee Only	\$ 1,474 \$ 1,961	\$ 1,834 \$ 1,706	\$ 1,834 \$ 1,706	\$ 1,834 \$ 1,706	\$ 884 \$ 822	
<b>City Direct Subsidy/Surcharge</b>						
<10 Yrs	\$ - \$ -	\$ - \$ -	\$ - \$ -	\$ 412 \$ 412	\$ (228) \$ (228)	
10-14 Yrs	\$ - \$ -	\$ - \$ -	\$ 300 \$ 300	\$ 612 \$ 612	\$ (128) \$ (128)	
15-19 Yrs	\$ - \$ -	\$ - \$ -	\$ 600 \$ 600	\$ 812 \$ 812	\$ - \$ -	
20-24 Yrs	\$ 500 \$ 500	\$ 500 \$ 500	\$ 900 \$ 900	\$ 1,012 \$ 1,012	\$ 128 \$ 128	
25+ Yrs	\$ 550 \$ 550	\$ 550 \$ 550	\$ 1,200 \$ 1,200	\$ 1,212 \$ 1,212	\$ 228 \$ 228	
<b>Net Premium</b>						
Employee Only <10 Yrs	\$ 1,474 \$ 1,961	\$ 1,834 \$ 1,706	\$ 1,834 \$ 1,706	\$ 1,422 \$ 1,294	\$ 1,112 \$ 1,050	
Employee Only 10-14 Yrs	\$ 1,474 \$ 1,961	\$ 1,834 \$ 1,706	\$ 1,534 \$ 1,406	\$ 1,222 \$ 1,094	\$ 1,012 \$ 950	
Employee Only 15-19 Yrs	\$ 1,474 \$ 1,961	\$ 1,834 \$ 1,706	\$ 1,234 \$ 1,106	\$ 1,022 \$ 894	\$ 884 \$ 822	
Employee Only 20-24 Yrs	\$ 974 \$ 1,461	\$ 1,334 \$ 1,206	\$ 934 \$ 806	\$ 822 \$ 694	\$ 756 \$ 694	
Employee Only 25+ Yrs	\$ 924 \$ 1,411	\$ 1,284 \$ 1,156	\$ 634 \$ 506	\$ 622 \$ 494	\$ 656 \$ 594	
2024 Total OPEB Liability	\$ 4,303,000	\$ 3,139,000	\$ 10,303,000	\$ 12,281,000	\$ 17,500,000	
2044 Total OPEB Liability	\$ 4,913,000	\$ 2,969,000	\$ 20,478,000	\$ 26,079,000	\$ 55,186,000	
2024 Current OPEB Assets	\$ 5,141,545	\$ 5,141,545	\$ 5,141,545	\$ 5,141,545	\$ 5,141,545	
2025 Additional Contributions	\$ -	\$ -	\$ 8,804,065	\$ 8,804,065	\$ 8,804,065	
Total Assets	\$ 5,141,545	\$ 5,141,545	\$ 13,945,610	\$ 13,945,610	\$ 13,945,610	
Net Position (Assets - 2024 Liability)	\$ 838,545	\$ 2,002,545	\$ 3,642,610	\$ 1,664,610	\$ (3,554,390)	
Funded Ratio (Assets / 2024 Liability)	> 100%	> 100%	> 100%	> 100%	80%	
ADC - Actuarial Determined Contrib.	\$ 153,000	\$ 87,103	\$ 436,653	\$ 589,647	\$ 1,194,618	
Increased ADC from Current	\$ -	\$ (65,897)	\$ 283,653	\$ 436,647	\$ 1,041,618	

Retiree

City



# Recommendations & Next Steps

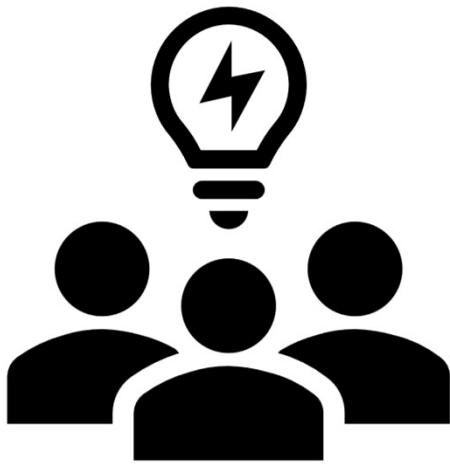
## Recommendation

- Change retiree health strategy to Option 4, because it:
- values our retirees by lowering premium costs to market-competitive rates
- decreases the likelihood of large rate increases in the future by use of the blended active/retiree rate
- modifies the direct subsidy to a subsidy/surcharge system that models our value for long-term employee service
- will be funded in a fiscally responsible manner

## Next Steps

- Staff will bring City Council meeting action items to:
- Request supplemental appropriations to move funds into the OPEB fund as follows:
  - Risk Fund - \$4,353,454
  - Health Fund - \$2,450,611
  - General Fund - \$2,000,000
- Update the HR medical plan policy to increase the allowed annual direct subsidy increase from .5% to 3%.
- If approved by the City Council, updated rates to all current retirees would begin in May 2025





# City Council Discussion

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- Would Council like to proceed with staff's recommendation?
- Questions?



# Appendix – Slide from July 2024 Presentation





## Summer of 2024

City of Lewisville Retiree Medical Premium Analysis  
June 2024

Monthly Medical Premium Subsidy			
	15yr	20yr	25yr
Allen	\$ -	\$ -	\$ -
Arlington	\$ -	\$ 500	\$ 550
Carrollton^	\$ -	\$ -	\$ -
Coppell	\$ -	\$ -	\$ 943
Dallas~	\$ -	\$ -	\$ -
Denton	\$ 120	\$ 160	\$ 200
Flower Mound	\$ 215	\$ 220	\$ 225
Fort Worth*	\$ -	\$ -	\$ -
Frisco	\$ 200	\$ 200	\$ 200
Garland"	\$ 516	\$ 516	\$ 516
Grand Prairie	\$ 595	\$ 757	\$ 919
Grapevine	\$ 61	\$ 141	\$ 141
Irving**	\$ -	\$ -	\$ 400
McKinney	\$ -	\$ -	\$ -
Mesquite	\$ 62	\$ 244	\$ 425
Plano	\$ -	\$ 110	\$ 165
Richardson	\$ -	\$ 551	\$ 551
Average	\$ 104	\$ 200	\$ 308
Median	\$ -	\$ 141	\$ 200
% of Cities	41%	59%	71%

Low Cost Plan Retiree Only	
	Net Monthly Premium @ 20 yrs
	\$ 1,327
	\$ 129
	\$ 1,305
	\$ 943
	\$ 1,378
	\$ 381
	\$ 574
	\$ 1,077
	\$ 800
	\$ 287
	\$ 324
	\$ 71
	\$ 1,218
	\$ 707
	\$ 301
	\$ 603
	\$ 373
	\$ 694
	\$ 603

OPEB Liability (millions)	OPEB fully funded?	Likely implicitly subsidized rates
\$ 1.7	No	No
\$ 99.3	No	Yes
\$ 2.8	No	No
\$ 3.3	No	No
\$ 208.4	No	No
\$ 41.5	No	Yes
\$ 4.7	No	Yes
\$ 750.0	No	No
\$ 3.4	Yes	No
\$ 97.4	No	Yes
\$ 57.6	No	No
\$ 74.9	No	Yes
\$ 13.5	No	No
\$ 16.2	No	Yes
\$ 31.0	No	Yes
\$ 131.7	No	Yes
\$ 49.3	No	No
\$ 93.3		
\$ 41.5		
	6%	47%

Lewisville#	\$ -	\$ 498	\$ 547
Difference (Avg)	\$ (104)	\$ 298	\$ 239
Difference (Med)	\$ -	\$ 357	\$ 347

	\$ 974
	\$ 280
	\$ 371

\$ 4.2	Yes	Yes
\$ (89.1)		
\$ (37.3)		

- 59% of cities provide some sort of subsidy to the total monthly medical cost at 20 years of service
- Lewisville's subsidy exceeds market averages
- Lewisville's net monthly premium for a 20 year retiree is higher than average
- Most cities do not fully fund their OPEB liability
- 47% of cities likely further subsidize their retiree medical costs from employee medical costs and analyzing through an actuary

- We discussed a monthly stipend paid to retirees. Our consultant has not seen such a program employed elsewhere. This option does not appear viable.
- Next Steps:
  - Ask actuary to study implications on premiums and long-term liability if we moved completely or partially to the implicitly subsidized standard (employee COBRA rate, currently \$870/mo.).
  - Share results and options with Council in November 2024.



# 2025 Lewisville Vision Plan Implementation

- Plan was approved in 2014 and updated in 2021.
- Implementation plan award was received by the City in 2020 (American Planning Association – National Planning Achievement Gold Award for Implementation)
- Annual updates on plan status has been provided through annual report to the residents.
- The majority of the plan initiatives (77%) have been accomplished, are ongoing, or determined to not be feasible.
- 38 action tasks remain.





# 2025 Lewisville Vision Plan Implementation

- Council has been asked to score remaining tasks
  - Average score: **7.04**
- Staff was also asked to score the same tasks
  - Average score: **6.53**
- Following are the top scores for City Council as well as the top scores for staff
  - ★ means task was identified as a high priority from both City Council and staff

Big Move	Goal	Action Priority	Status Update	Score	Special Consideration (Up to Three Action Priorities)	Total Score (Auto Calculated)
EXAMPLE BIG MOVE	EXAMPLE GOAL	EXAMPLE ACTION PRIORITY	PARTIALLY COMPLETE	7	5	12
Green Centerpiece	Create a Green Centerpiece within the large natural area of the Elm Fork floodplain and around Lewisville Lake.	Update Nature Center concepts to meet the needs and interests of Lewisville residents.	Partially Complete	7	0	7
		Secure adequate Green Centerpiece resource and funding commitments for the updated Master Strategy and Nature Center.	Partially Complete	7	0	7
		Develop a plan for the landfills and other adjacent properties so their future use enhances the Green Centerpiece.	Partially Complete	10	0	10
Extending the Green	Extending the Green by expanding the Green Centerpiece and trail system, both physically and visually, to connect with other parts of the City.	Provide financial support to existing community gardens that serve low-to-moderate income clientele or that provide produce to local food banks in order to build capacity and provide inexpensive fresh produce to those Lewisville residents in greatest need.	No Significant Progress	5	0	5
		Use education, incentives and other techniques to encourage existing Lewisville businesses to embrace green practices and connect to the green destinations and trails citywide.	No Significant Progress	5	0	5
Old Town	Continue investment in Old Town.	Evaluate additional activities that would bring people to Old Town (such as higher education classes, training, makerspace, incubator business, popup stores).	Partially Complete	7	0	7
Diverse & Thriving Neighborhoods	Maintain and enhance Lewisville's Diverse and Thriving Neighborhoods	Engage residents, private sector, medical providers, nonprofit organizations, faith-based communities and others in an initiative to define a set of 'essential neighborhood resources and services', identify current gaps in availability and create a strategy to address these.	No Significant Progress	6	0	6
		Develop a strategy for maintenance and rehabilitation of existing apartment complexes that improves residents' quality of life while continuing to include affordable housing.	Partially Complete	10	5	15
		Continue and expand the Police and Code Compliance Departments' Nuisance Abatement programs for multi-family and hotel/motel properties.	Partially Complete	10	0	10



## Council (Top 3rd of Scores)

	Order	Big Move	Action Priority	Status	Score
★	1	Diverse & Thriving Neighborhoods	Develop a strategy for maintenance and rehabilitation of existing apartment complexes that improves residents' quality of life while continuing to include affordable housing.	Partially Complete	12.57
★	2	Old Town	Evaluate additional activities that would bring people to Old Town (such as higher education classes, training, makerspace, incubator business, popup stores).	Partially Complete	9.86
★	3	Diverse & Thriving Neighborhoods	Continue and expand the Police and Code Compliance Departments' Nuisance Abatement programs for multi-family and hotel/motel properties.	Partially Complete	9.29
★	4	Connected City	Improve the access and connection of all residents to jobs, education and resources.	Partially Complete	9.00
★	5	Connected City	Provide free public WIFI at all public parks within Lewisville and continue to install smart technologies at these public locations, with highest priority given to low and moderate income areas.	Partially Complete	9.00
★	6	Values-Driven Organization	Expand dialogue with communities of color to understand their experiences and identify actions to improve Lewisville as a place for them to live and work.	Partially Complete	8.86
★	7	Data-Driven Organization	Use data to identify demographics and geographies where more events and interaction are needed between residents and City staff.	Partially Complete	8.57
	8	Data-Driven Organization	Identify data to use in monitoring issues among populations in group quarters, such as senior living centers.	No Significant Progress	8.43
★	9	Economic Vitality	Develop an inventory of retail establishments in Lewisville, for use in communication, marketing and business support.	Partially Complete	8.14
	10	Identity, Place, and Communications	Way-finding, messaging and informational materials should create inviting and understandable routes between Lewisville's distinctive places.	Partially Complete	8.14
★	11	Values-Driven Organization	Involve the entire diverse community in implementation of Lewisville 2025 and in service on City Boards and Commissions.	Partially Complete	8.14
★	12	Green Centerpiece	Secure adequate Green Centerpiece resource and funding commitments for the updated Master Strategy and Nature Center.	Partially Complete	7.86
	13	Data-Driven Organization	Continue the conversation on racial inclusiveness and ideas which will help Lewisville be the kind of place where all residents want to work and live.	Partially Complete	7.86

## Staff (Top 3rd of Scores)

	Order	Big Move	Action Priority	Status	Score
★	1	Diverse & Thriving Neighborhoods	Develop a strategy for maintenance and rehabilitation of existing apartment complexes that improves residents' quality of life while continuing to include affordable housing.	Partially Complete	9.31
★	2	Values-Driven Organization	Involve the entire diverse community in implementation of Lewisville 2025 and in service on City Boards and Commissions.	Partially Complete	8.94
	3	Identity, Place, and Communications	Central I-35E: Work with owners and offer incentives to redo, improve or redevelop commercial centers.	Partially Complete	8.75
★	4	Diverse & Thriving Neighborhoods	Continue and expand the Police and Code Compliance Departments' Nuisance Abatement programs for multi-family and hotel/motel properties.	Partially Complete	8.44
★	5	Connected City	Provide free public WIFI at all public parks within Lewisville and continue to install smart technologies at these public locations, with highest priority given to low and moderate income areas.	Partially Complete	7.88
	6	Green Centerpiece	Develop a plan for the landfills and other adjacent properties so their future use enhances the Green Centerpiece.	Partially Complete	7.75
★	7	Connected City	Improve the access and connection of all residents to jobs, education and resources.	Partially Complete	7.75
★	8	Green Centerpiece	Secure adequate Green Centerpiece resource and funding commitments for the updated Master Strategy and Nature Center.	Partially Complete	7.56
★	9	Data-Driven Organization	Use data to identify demographics and geographies where more events and interaction are needed between residents and City staff.	Partially Complete	7.38
	10	Identity, Place, and Communications	All Gateways: Continue to improve gateways into Lewisville to provide distinctive entrances and create a unique sense of place for pedestrians and cyclists as well as drivers.	Partially Complete	7.25
★	11	Economic Vitality	Develop an inventory of retail establishments in Lewisville, for use in communication, marketing and business support.	Partially Complete	7.13
★	12	Old Town	Evaluate additional activities that would bring people to Old Town (such as higher education classes, training, makerspace, incubator business, popup stores).	Partially Complete	7.00
★	13	Values-Driven Organization	Expand dialogue with communities of color to understand their experiences and identify actions to improve Lewisville as a place for them to live and work.	Partially Complete	7.00



# Highest Priority Tasks (Averaged)

Order	Big Move	Action Priority	Status	Score - Council	Score - Staff	Score - Averaged
1	Diverse & Thriving Neighborhoods	Develop a strategy for maintenance and rehabilitation of existing apartment complexes that improves residents' quality of life while continuing to include affordable housing.	Partially Complete	12.57	9.31	<b>10.94</b>
2	Diverse & Thriving Neighborhoods	Continue and expand the Police and Code Compliance Departments' Nuisance Abatement programs for multi-family and hotel/motel properties.	Partially Complete	9.29	8.44	<b>8.86</b>
3	Values-Driven Organization	Involve the entire diverse community in implementation of Lewisville 2025 and in service on City Boards and Commissions.	Partially Complete	8.14	8.94	<b>8.54</b>
4	Connected City	Provide free public WIFI at all public parks within Lewisville and continue to install smart technologies at these public locations, with highest priority given to low and moderate income areas.	Partially Complete	9.00	7.88	<b>8.44</b>
5	Old Town	Evaluate additional activities that would bring people to Old Town (such as higher education classes, training, makerspace, incubator business, popup stores).	Partially Complete	9.86	7.00	<b>8.43</b>
6	Connected City	Improve the access and connection of all residents to jobs, education and resources.	Partially Complete	9.00	7.75	<b>8.38</b>
7	Data-Driven Organization	Use data to identify demographics and geographies where more events and interaction are needed between residents and City staff.	Partially Complete	8.57	7.38	<b>7.97</b>
8	Values-Driven Organization	Expand dialogue with communities of color to understand their experiences and identify actions to improve Lewisville as a place for them to live and work.	Partially Complete	8.86	7.00	<b>7.93</b>
9	Green Centerpiece	Secure adequate Green Centerpiece resource and funding commitments for the updated Master Strategy and Nature Center.	Partially Complete	7.86	7.56	<b>7.71</b>
10	Economic Vitality	Develop an inventory of retail establishments in Lewisville, for use in communication, marketing and business support.	Partially Complete	8.14	7.13	<b>7.63</b>
11	Identity, Place, and Communications	Central I-35E: Work with owners and offer incentives to redo, improve or redevelop commercial centers.	Partially Complete	6.43	8.75	<b>7.59</b>
12	Connected City	Way-finding, messaging and informational materials should create inviting and understandable routes between Lewisville's distinctive places.	Partially Complete	8.14	6.25	<b>7.20</b>
13	Connected City	Increase collaboration with social service agencies, non-profits, utility providers and others to help the Lewisville community become more adaptable and resilient, and to offer the community coordinated support in times of crisis.	Partially Complete	7.43	6.88	<b>7.15</b>



# Consensus on Remainder of Tasks

- Remaining tasks with an average score of 5.00 and up:
  - Incorporate into Lewisville 2035, but not as urgent as highest priority tasks that will be accomplished in FY 2026.
- Remaining tasks with an average score of 4.99 or less:
  - Consider removal due to infeasibility or lack of public interest.

Order	Big Move	Action Priority	Status	Score - Council	Score - Staff	Score - Averaged
35	Identity, Place, and Communications	Southwestern Gateway: Use economic development policy to support international trade and distribution businesses located in the Southwest Lewisville area.	Partially Complete	5.29	5.00	<b>5.14</b>
36	Identity, Place, and Communications	All Gateways: Incorporate energy efficiency and sustainable design in improvements to gateways and identity focal points.	No Significant Progress	4.00	4.94	<b>4.47</b>
37	Connected City	Have more community gardens so people connect with their neighbors.	No Significant Progress	4.86	4.06	<b>4.46</b>
38	Identity, Place, and Communications	All Gateways: Engage community residents, property owners and other stakeholders in each of these areas to create appropriate and appealing names for these places.	No Significant Progress	3.00	3.81	<b>3.41</b>



# Next Steps

- **Short-Term:** Top Lewisville 2025 Action Priorities will become the focus of the FY 2026 budget.
- **Medium-Term:** Council’s previously-identified Strategic Focus Areas will remain in place, but serve as more broad guidance over the next few years.
  - Discuss whether any changes are need to Strategic Focus Areas.
- **Long-Term:** The Lewisville 2025 plan will become Lewisville 2035. 2035 initiatives will then serve as the City’s long-term goals.

Short-Term (FY 2026) Lewisville 2025 Top Action Priorities	Medium-Term (Broader Direction) Strategic Focus Areas	Long-Term (Overarching Goals) Lewisville 2035 Initiatives
Develop a strategy for maintenance and rehabilitation of existing apartment complexes that improves residents' quality of life while continuing to include affordable housing.	Affordable Housing  Lake District/Northern Gateway  City Infrastructure and Planning  Beautification Initiatives  Mall Redevelopment  10-Minute Walk to a Park  Business 121 Corridor Planning  Public Engagement	To Be Determined
Continue and expand the Police and Code Compliance Departments' Nuisance Abatement programs for multi-family and hotel/motel properties.		
Involve the entire diverse community in implementation of Lewisville 2025 and in service on City Boards and Commissions.		
Provide free public WIFI at all public parks within Lewisville and continue to install smart technologies at these public locations, with highest priority given to low and moderate-income areas.		
Evaluate additional activities that would bring people to Old Town (such as higher education classes, training, makerspace, incubator business, popup stores).		
Improve the access and connection of all residents to jobs, education and resources.		
Use data to identify demographics and geographies where more events and interaction are needed between residents and City staff.		
Expand dialogue with communities of color to understand their experiences and identify actions to improve Lewisville as a place for them to live and work.		
Secure adequate Green Centerpiece resource and funding commitments for the updated Master Strategy and Nature Center.		
Develop an inventory of retail establishments in Lewisville, for use in communication, marketing and business support.		





# Economic Outlook: Trends, Demographics, and Budget Insights

Lewisville City Council Retreat 2025





# **ECONOMIC OUTLOOK (AGENDA)**



Economic indices and trend information are included for the following areas:

**ECONOMIC  
INDICATORS**

**DEMOGRAPHICS**

**BUDGETARY &  
FINANCE**

These indices provide economic context leading into the annual budget process.





# **ECONOMIC INDICATORS**





# ECONOMIC INDICATORS

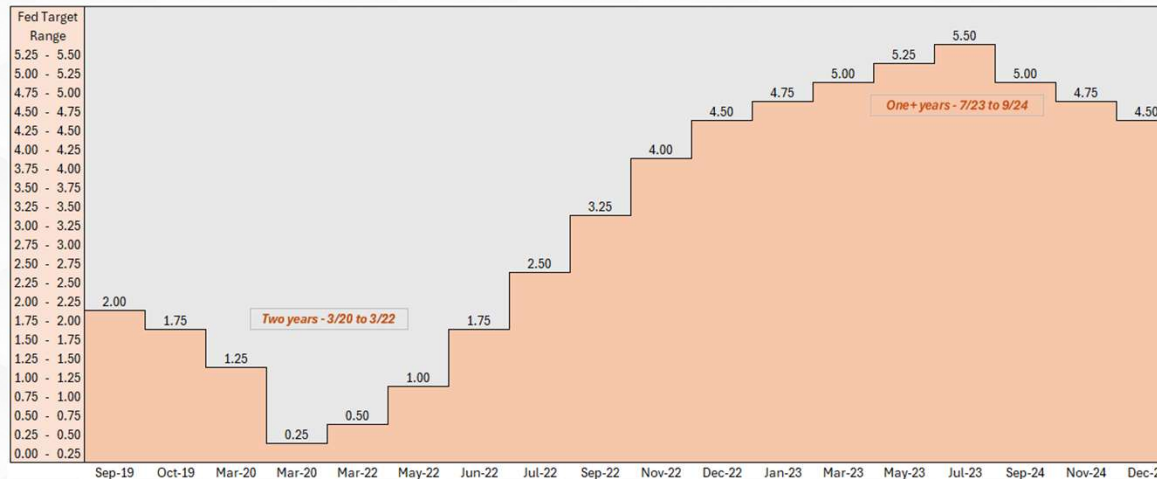


- Data information being presented reflect the most recent data available at the time of preparation.
- Policy changes may increase market uncertainty and trend projections.
- Key Policy Factors
  - Regulatory changes affecting businesses and economic activity
  - Tax policies influencing consumer and corporate behavior
  - Trade agreements & tariffs, impacting global commerce and costs
- Interest Rate & Inflation Impact
  - Federal Reserve actions in response to economic shifts
  - Changes in expectations for future inflation
  - Price volatility due to tariffs
  - Consumer sentiment fluctuations
- Employment Considerations
  - Supply chain disruptions affecting job markets
  - Shifts in hiring trends across industries



# INTEREST RATES

- The Federal Open Market Committee had been expected to make two quarter-percentage point rate reductions by the end of 2025. This is half a percentage point less than was anticipated this past September. Inflation had been falling much faster than expected when they updated their forecast in September. New job reports have come in better than expected impacting future rate cuts. Cuts are projected to start in July, if they proceed.
- The Federal Reserve cut the federal-funds rate by 0.25 percentage points to a target range of 4.25%-4.50%. The Fed has cut by a cumulative 1 percentage point since initiating cutting in September 2024. Before that, the rate had been at 5.25%-5.50% since July 2023.

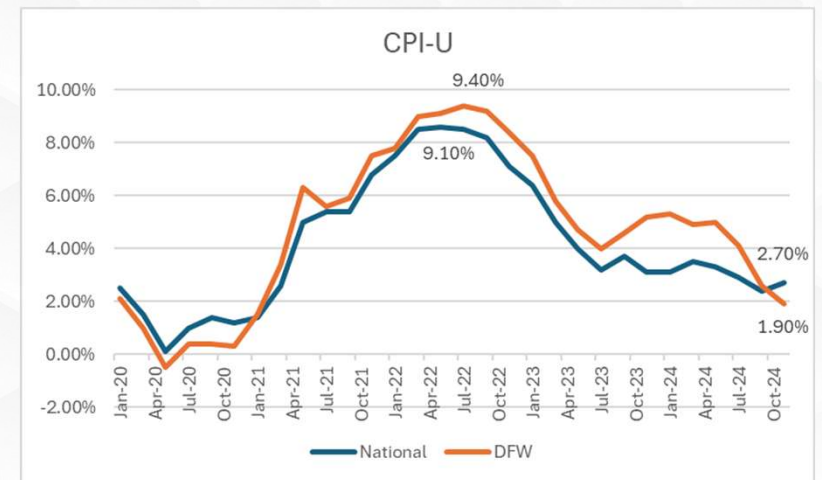


- **Impacts:** Interest rates on Series 2024 bonds were 3.41% and 3.42% on GO and Utility Issues compared to 3.56% and 3.40% on the Series 2023 bonds. Conservative rate estimates from our financial advisor on our Series 2025 bonds is 4.0%.



# INFLATION-CPI

- Consumer Price Index (CPI) is made up of eight major components:
  - Food and beverages, Apparel, Transportation, Medical Care, Recreation, education, and communication, Housing, Other goods and services, Government-charged user fees
- The National CPI for all urban consumers (CPI-U) increased 2.7% from November 2023 to November 2024. This is down from the peak of 9.1% in June 2022.
  - Food prices were 2.4% higher, Energy prices were 3.2% lower.
  - The index for shelter rose 0.3% in November, accounting for nearly 40% of the monthly increase.
  - Core inflation (excludes food and energy) remained steady at 3.3%.
- Inflation is not accelerating but remains "*persistently too high.*" Fed's target inflation rate is 2.0%.







# INFLATION-CONSTRUCTION



In 2024, the construction industry experienced moderate inflation, with building costs increasing by approximately 4% to 5% compared to the previous year. Turner Construction Company's Building Cost Index reported a 4.10% year-over-year increase in the second quarter of 2024. Looking ahead to 2025, forecasts suggest a continuation of this trend. JLL's 2025 U.S. Construction Outlook anticipates cost growth between 5% and 7%, with variations depending on specific materials.

*Note: utility projects have experienced higher construction inflation due to project complexity and number of qualified firms to bid on proposals.*

- Several factors are expected to influence construction costs in 2025:
  - **Material Costs:** Prices for key construction materials are likely to remain high due to ongoing supply chain issues and demand fluctuations.
  - **Labor Costs:** Labor shortages continue to be a challenge, with more than 90% of contractors reporting difficulties in finding both hourly and salaried positions. This shortage is expected to contribute to rising labor costs in 2025.
  - **Economic Factors:** Anticipated interest rate cuts in 2025 may boost construction activity, potentially increasing demand for materials and labor, which could exert upward pressure on prices.
- **Impacts:** Rising prices for basic materials and supplies can strain departmental budgets if not managed. City staff has been able to mitigate this for the most part through efficiency gains and adjusting priorities. The City has addressed rising construction prices through utilizing firms to assist with project controls and project management.





# EMPLOYMENT



- Texas employment increased 0.9% in November, faster than October's 0.1% increase
  - U.S. job growth was 1.7% in November
- The Dallas Fed's Texas Employment Forecast indicates jobs will increase by 1.6% in 2024
  - Forecast was 2.1% percent previously
  - Above the year-to-date growth for the U.S. of 1.4%
- Federal Reserve – Dallas through their Business Outlook Surveys show flat manufacturing and an expanding service sector currently
  - Expect an increase in demand over the next six months, due generally to favorable economic conditions
- Texas unemployment rate for November was 4.2% (at 12/20/2024). National unemployment rate also came in at 4.2% for the same period. Payrolls up by 227,000 in November 2024, higher than consensus estimate of 214,000.
  - Unemployment spiked in April 2020 to 12.8%
  - Significant drop to lowest level in April 2022 to 3.8%. Pre-pandemic low unemployment rate was 3.4% in June 2019
  - Hovered between 3.8% and 4.2% between April 2022 and November 2024
- **Impacts:** The City addressed challenges posed by tighter labor markets, which had made filling vacant positions difficult, by introducing several measures, including salary and benefit adjustments identified in a comprehensive compensation study conducted in Fall/Winter 2022-23.





# MULTI-FAMILY RENTAL RATE TRENDS



- Vacancy in Lewisville has stabilized over the past year thanks to improving demand.
- Throughout 2024, the daily asking rent per SF rose and fell, peaking at \$1.78 per SF in May before decreasing to \$1.73 towards the end of December. Rents declining is due to the sheer volume of units delivered in the market.
- Rent growth is expected to recover through mid-2025 before increasing in 2026 due to less supply and the market being relatively supply-constrained.





# OFFICE SPACE TRENDS



- Lewisville currently has 5.5M square feet of inventory for office space, which was an increase from last year's inventory of 5.3M square feet.
- In 2024, 187,000 square feet of office space was under construction, which has been consistent with 2023. In 2023, the occupancy rate ranged between 77.5% to 81.1%.
- In 2024, the average occupancy rate was 79.12%. Over the coming years, the trend shows that occupancy will remain at approximately 79%.
- Over the past year, Lewisville's vacancy rate has changed by about 2.6%, a result of 270,000 SF of net delivered space and -20,000 SF of net absorption.



# INDUSTRIAL SPACE TRENDS

- 19.5M square feet of inventory with 562K under construction.
- According to Costar, Lewisville's net absorption is strong for this submarket. The first half of 2024 has seen strong tenant demand in the first quarter and despite the move-outs in the subsequent period, the vacancy rate remained relatively stable at 6.5%, below the market average.
- The occupancy rate in 2024 was 95.5%. The trend shows that occupancy rates are anticipated to stay between around 95% in 2025.

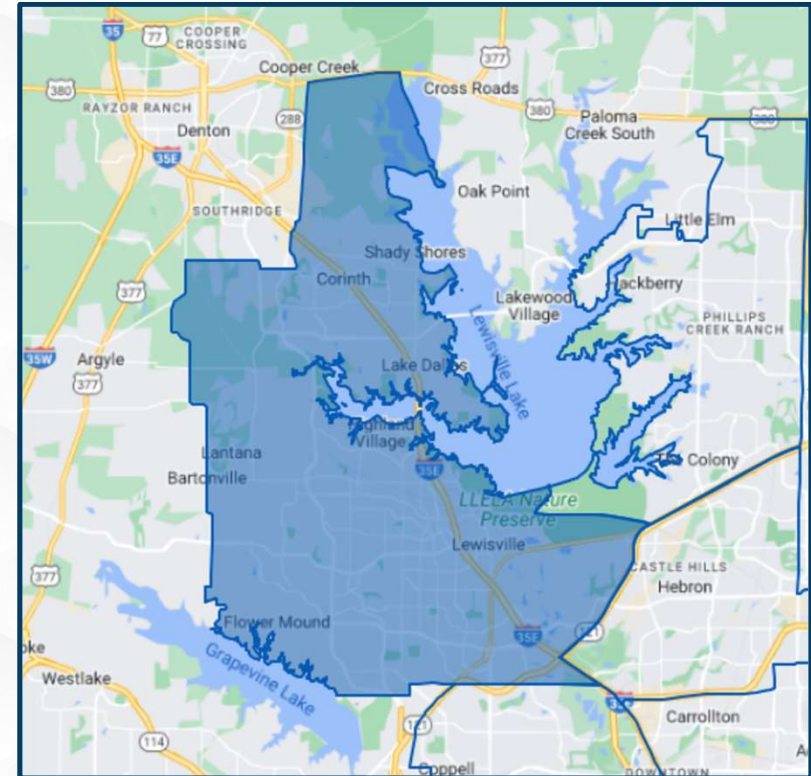
City	Total Sq. Ft. of Industrial	Percentage of Total Land Area Used for Industrial
Frisco	5M	0.3%
Allen	3M	0.4%
Plano	12M	0.6%
Denton	20.2M	0.8%
McKinney	16M	0.8%
Flower Mound	10.5M	0.9%
Richardson	8.8M	1.1%
Grapevine	13M	1.3%
Lewisville	19.5M	1.6%
Mesquite	23.5M	1.7%
Fort Worth	177M	1.8%
Dallas	198M	1.8%
Garland	31.1M	1.8%
Arlington	49M	2.0%
Irving	41.8M	2.2%
Grand Prairie	66.5M	2.9%
Carrollton	37.1M	3.6%
Coppell	29.2M	7.1%

\*Cities not built out are naturally lower



# RETAIL TRENDS

- In 2024, Lewisville occupancy rates remained steady at 93%. The forecast shows that occupancy will remain relatively flat at 93% over the coming years.
- In the last year, over 63,000 square feet of retail space was delivered.
- With 19.0 million SF of space, Lewisville remains the single largest retail submarket across all of North Texas.



Lewisville, Highland Village, Corinth, Lake Dallas, Flower Mound, Lantana, Bartonville, Copper Canyon





# DEMOGRAPHICS



# INCOME LEVELS IN LEWISVILLE



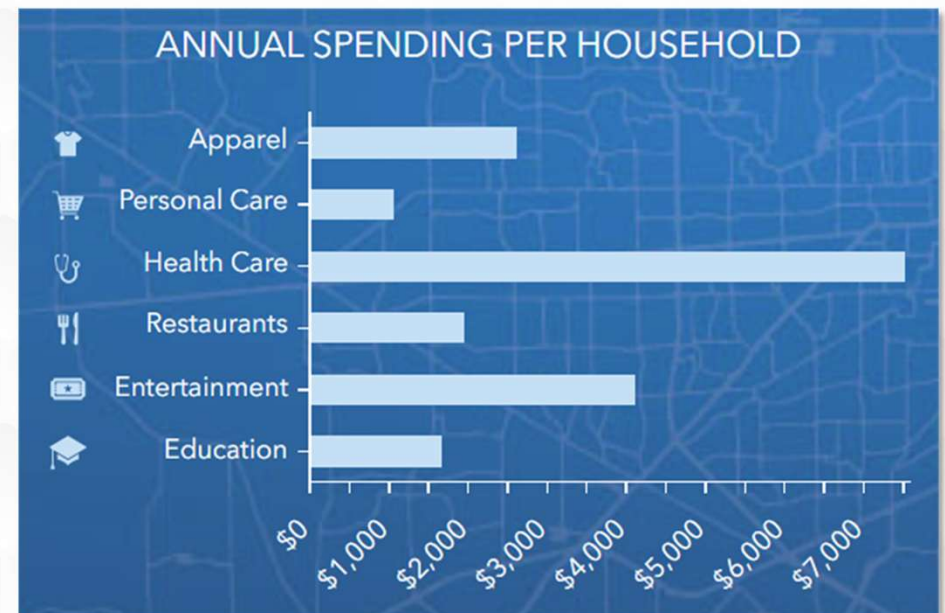
2024 Households by income (Esri)

The largest group: \$100,000 - \$149,999 (19.6%)

The smallest group: \$15,000 - \$24,999 (3.5%)

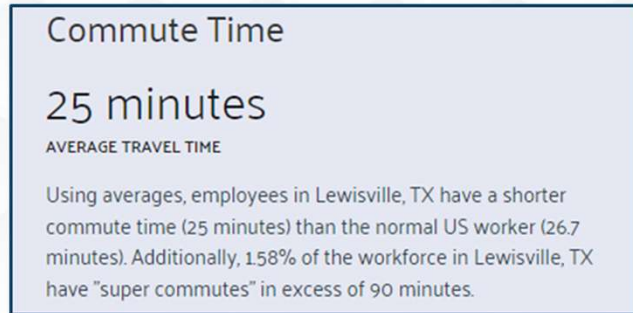
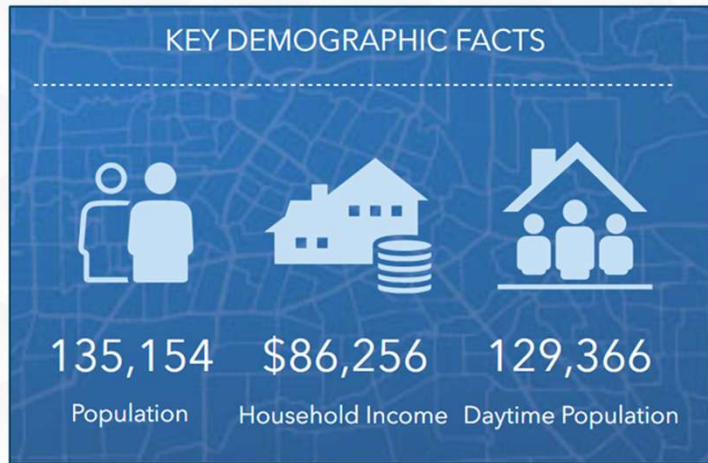
Indicator ▲	Value	Diff	
<\$15,000	5.0%	-0.2%	
\$15,000 - \$24,999	3.5%	+0.6%	
\$25,000 - \$34,999	5.6%	+1.6%	
\$35,000 - \$49,999	10.1%	+2.7%	
\$50,000 - \$74,999	18.3%	+4.9%	
\$75,000 - \$99,999	14.4%	+2.3%	
\$100,000 - \$149,999	19.6%	-1.1%	
\$150,000 - \$199,999	11.4%	-2.9%	
\$200,000+	12.1%	-8.1%	

Bars show deviation from Denton County

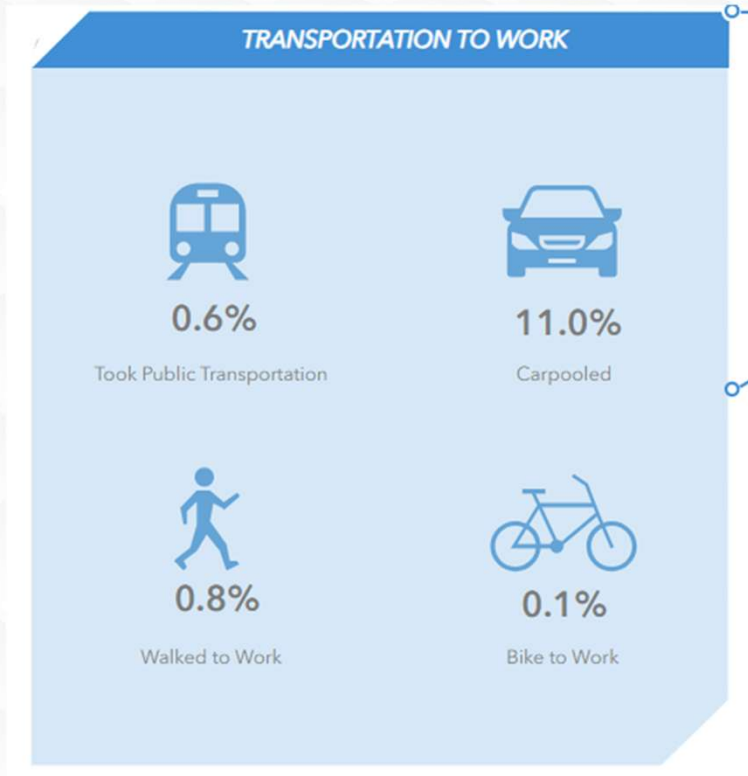




# DAYTIME POPULATION



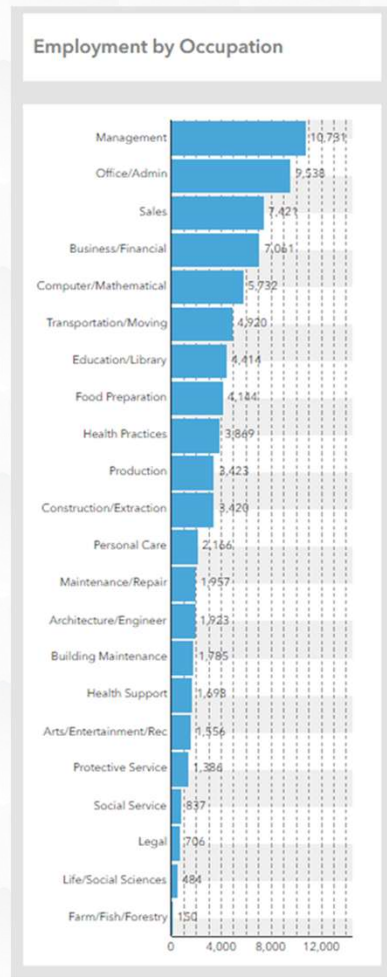
Source datausa.io/



Source: Esri: ArcGIS Business Analyst, US Census Bureau



# TOTAL NUMBER OF JOBS IN LEWISVILLE



Source: Esri: ArcGIS Business Analyst



# ASSESSED VALUE GROWTH

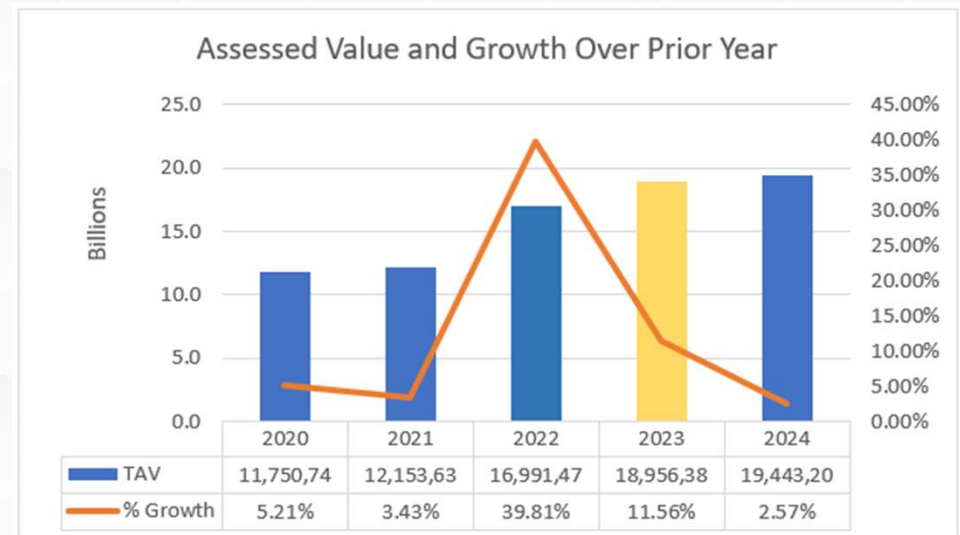
<u>Tax Year</u>	<u>Fiscal Year</u>	<u>TAV</u>	<u>% Growth</u>
2020	2021	11,750,744,030	5.21%
2021	2022	12,153,639,782	3.43%
2022	2023	16,991,471,159	39.81%
2023	2024	18,956,387,907	11.56%
2024	2025	19,443,205,141	2.57%

- The pace of growth had slowed prior to annexation
- Factors impacting tax values after annexation
  - Absorption of District parcels into City rolls and increased property values (TY 2022)
  - Increased property values (TY 2023)
  - Increased residential and multi-family property values offset by smaller gains in commercial and BPP (TY 2024)



# ASSESSED VALUE GROWTH

- Projection for overall growth in taxable assessed value beyond 2025
  - Assumptions used in Hilltop debt analysis
    - 4.5% for 2026-2028
    - 1.0% for 2029-2038
    - 0.25% for 2039 and thereafter
  - *Will revisit assumptions annually*

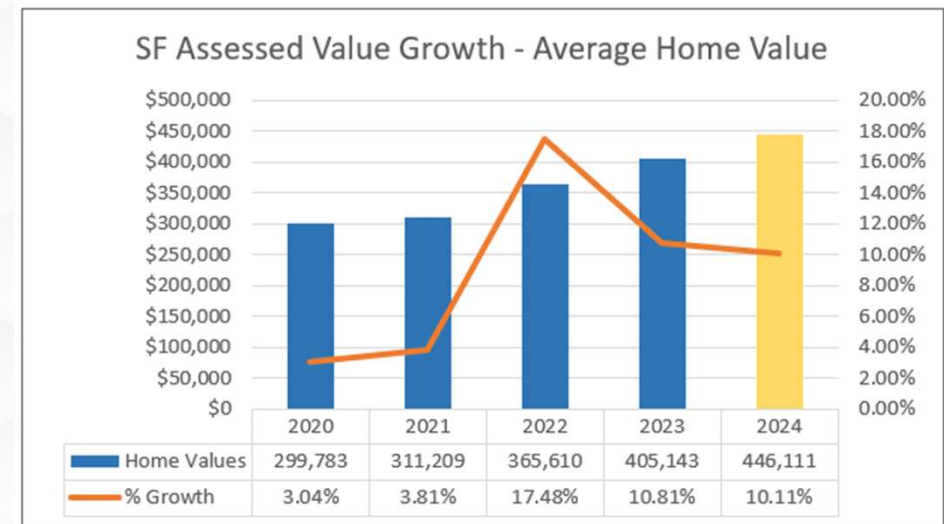




# SF ASSESSED VALUE GROWTH TREND

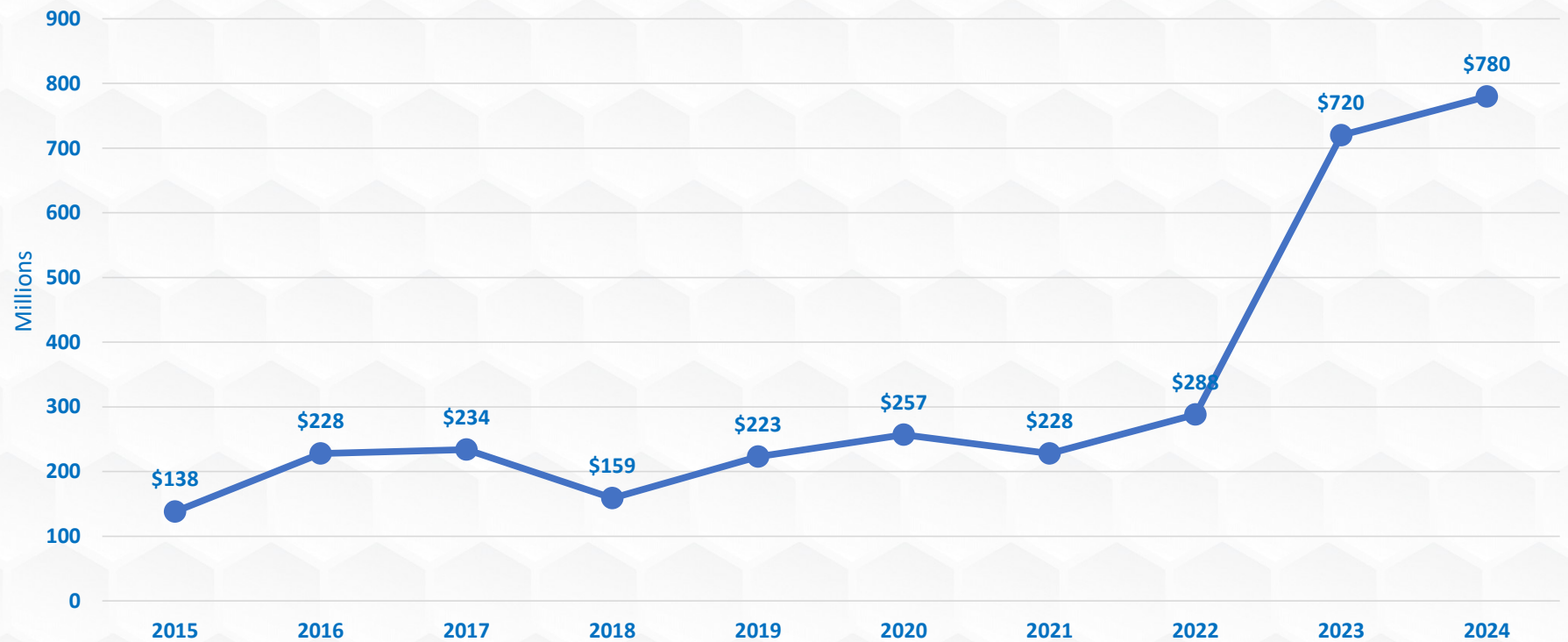
- Near-term projection for home value growth
  - Continue to be impacted by escalating home values
  - Some slowdown in the housing market
  - Playing "Catch-up" with market values
- Long-term increases of 4% - 6% projected
- Tracking average and median home values

Tax Year	Fiscal Year	Home Values			
		Average	% Growth	Median	% Growth
2020	2021	299,783	3.04%		
2021	2022	311,209	3.81%		
2022	2023	365,610	17.48%		
2023	2024	405,143	10.81%	351,567	
2024	2025	446,111	10.11%	371,349	5.63%





# TREND IN NEW VALUE





# OLD TOWN PROJECTS

## COMPLETED



### Station at Old Town

286 MF Units

Capital Investment: \$45M



### Main and Mill Lofts

203 MF Units

Capital Investment: \$40M



### Mill at Old Town

213 MF Units

Capital Investment: \$30M

## UNDER CONSTRUCTION



### Aura Main Street

325 MF Units

Capital Investment: \$102M



### The Whitlow

420 MF Units

Capital Investment: \$77M



### Deck On Main

Commercial – restaurant, office, event space

Capital Investment: \$5M+



# OTHER PROJECTS



## Heritage Trails/Heritage Towers

Complete

Townhomes; Multifamily Units

Capital Investment: \$98.8M



## Bison Grove

Complete

Office/Warehouse

Capital Investment: \$69.5



## Lakeside Crossing

Under Construction

Multifamily Units; Townhome;  
Retail/Restaurant; Live/Work units

Capital Investment: \$14.3M



## Wells Fargo

Under Construction

Data Center

Capital Investment: \$470M



## Merit (Legacy North)

Under Construction

Multifamily Units; Commercial and  
Dog Park

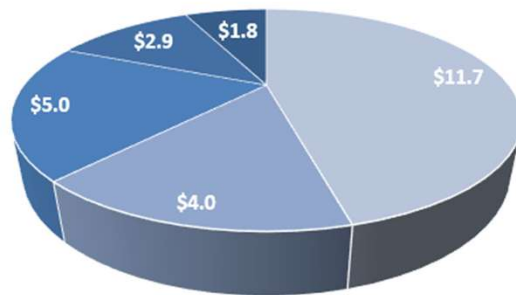
Capital Investment: \$41M



# CHANGES IN PROPERTY VALUATIONS BY CATEGORY

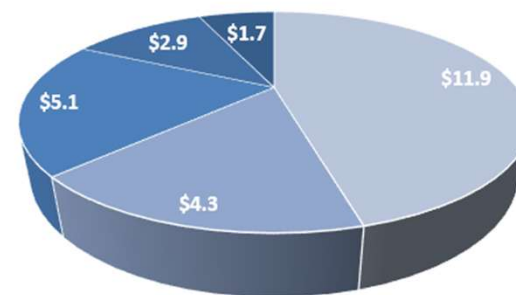
	2023		2024		Change from PY
	\$	%	\$	%	
Single Family	11.68	46.04%	11.91	45.87%	1.92%
Multi Family	3.98	15.69%	4.35	16.75%	9.26%
Commercial	4.98	19.62%	5.10	19.63%	2.40%
Business PP	2.94	11.60%	2.91	11.22%	-1.04%
Other	1.79	7.05%	1.69	6.52%	-5.32%
	25.37	100.00%	25.96	100.00%	2.31%

2023-24 Market Value  
(in Billions)



Single Family Multi Family Commercial Business PP Other

2024-25 Market Value  
(in Billions)



Single Family Multi Family Commercial Business PP Other





# BOND RATING CONSIDERATIONS



- The most recent ratings were conducted in August 2024
  - The city requested ratings from both S&P and Fitch bond rating agencies
  - Revenue Bonds are rated AAA by both S&P and Fitch, while General Obligation (GO) bonds are rated AAA by S&P and AA+ by Fitch
- Ratings from two agencies typically needed on larger sized issues
  - Series 2024 bonds issued - GO, \$25.5M and Utility Revenue, \$16.3M
- These ratings play a key role in determining borrowing costs and reflect the credit risk of the issue
  - The final interest rates for the Series 2024 GO and Utility Revenue bonds were 3.41% and 3.42%, respectively





# BOND RATING CONSIDERATIONS



- Notable comments from rating agencies from most recent review
- Methodology unchanged for S&P while Fitch implemented new U.S. Public Finance Local Government Rating Criteria
  - Measures City-Wide demographics along with traditional financial metrics
- Key rating drivers noted by S&P:
  - Strong expected **economic growth** due to redevelopment and infill development, steady population growth
  - Solid finances and **maintenance of solid reserves**, supported by growing major revenue sources and conservative financial-management practices (noted again for Series 2024 issues)
  - Very strong management with **strong financial management policies**, practices under their financial management assessment methodology showing a capital and financial planning program; policies guiding investments (and cash management), debt issuance, and reserves
- Fitch narrative:
  - Lewisville's financial resilience – strong
    - Driven by its 'High' **revenue and expenditure control**
    - Strong **population trend** and a **population and economy of sufficient size and diversification**





# BLUE RIBBON AND 2024 BOND ELECTION



- Blue Ribbon Committee identified capital project priorities to be funded over the next 10 years: \$263.4M
- Propositions considered were for Streets, Animal Shelter/Adoption Center Expansion, Public Safety, and Parks and Open Space
- Bond election overwhelmingly approved by voters in May 2024
- All propositions received strong support, averaging 74% voting in favor
- Funding of year-one projects includes (\$25.5M issued):
  - Animal Shelter/Adoption Center Expansion
  - Various neighborhood and arterial streets and roadways
  - Land acquisition for public safety and parks
  - Public Art (animal shelter and parks)



# YEAR 1 BLUE RIBBON BOND PROJECTS



## Corporate Drive Seg. 4 & 5

FY 2024 Issuance: \$540K

Funds used to cover inflation-related construction overages on Segments 4 & 5; estimated completion in late 2027



## Fire Station 4 Land Acquisition

FY 2024 Issuance: \$2.5M

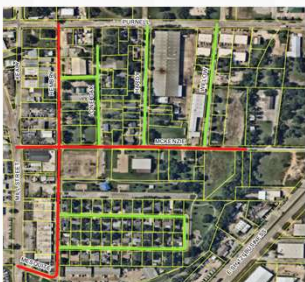
Working with third-party consultant to perform station study to determine best location, response time, and station needs



## Misc. Public Art Funding

FY 2024 Issuance: \$50K

To be utilized throughout course of design and construction of various art pieces for parks and trails



## McKenzie-Hembry Neighborhood

FY 2024 Issuance: \$2M

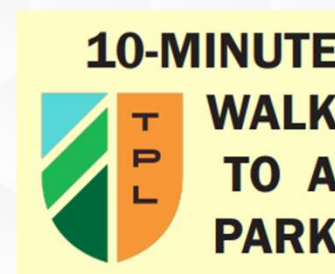
Phase 1 ROW acquisition underway; interlocal with Denton County for Phase 2 approved



## Vista Ridge Park & Amphitheater

FY 2024 Issuance: \$600K

Landscape architecture & design agreement approved in January 2025



## 10-Minute Walk to a Park Gap

FY 2024 Issuance: \$1.4M

City Council reviewed potential property acquisitions and priorities during annual retreat



## Lake Park Redevelopment

FY 2024 Issuance: \$1.4M

Master plan was approved by U.S. Army Corps of Engineers in December 2024. Infrastructure improvements are in design and will be made using a phased approach



## Denton County LID Trail

FY 2024 Issuance: \$1M

Multiple agreements have been executed for design and construction management



## Animal Shelter Expansion

FY 2024 Issuance: \$9.9M

Finalizing PSA for building design and landscaping to take to Council for approval



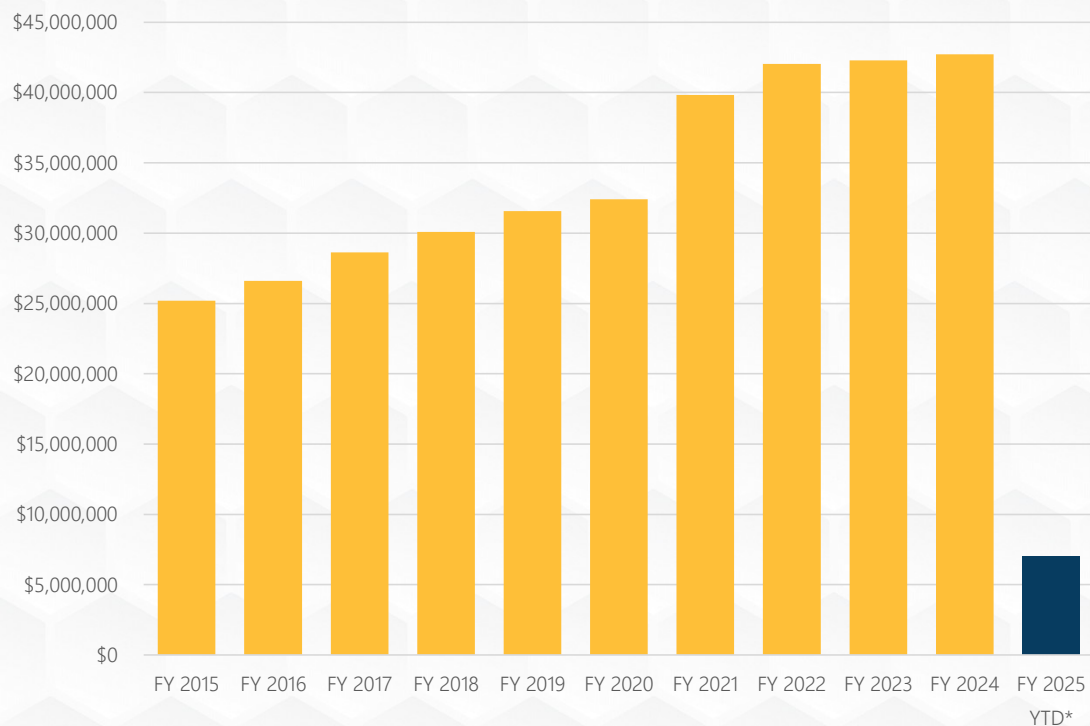


# **BUDGETARY & FINANCE**



# SALES TAX – GENERAL FUND

Actuals - General Fund



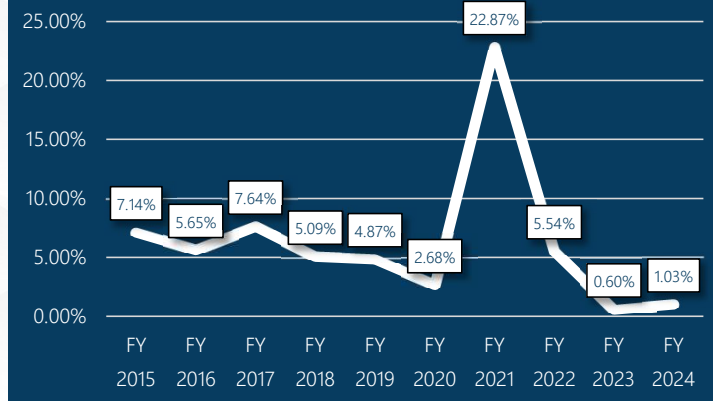
\*Data as of 2/5/2025.

FY 2024 actuals increased by \$435K or just over 1% when compared to last year's actuals.

In recent years, we continue to see increased sales tax revenue but have recognized a slowing of that growth, indicating a potential flattening of this revenue source.

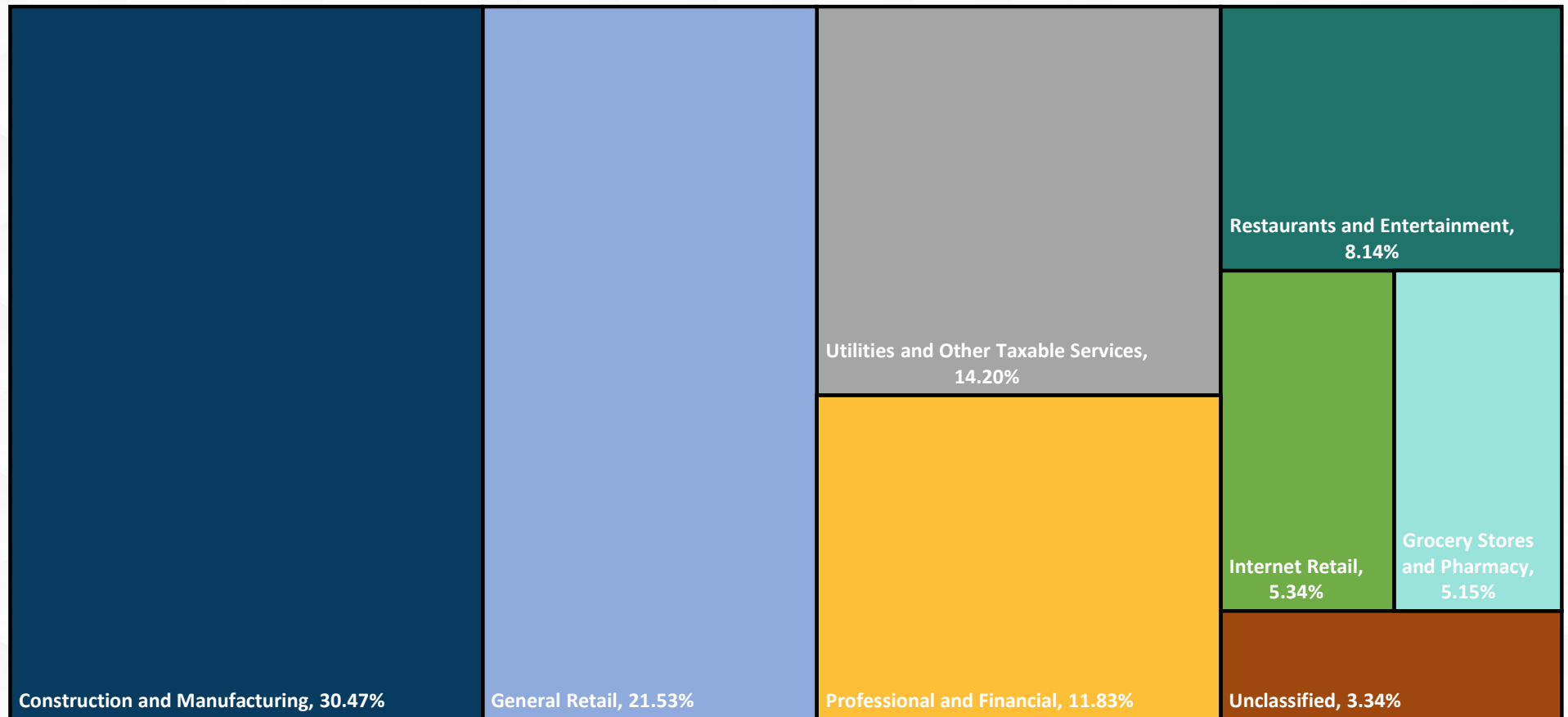
Staff is working with our sales tax audit firm to identify any potential audits that may produce additional revenue.

Percent Change from Prior Year



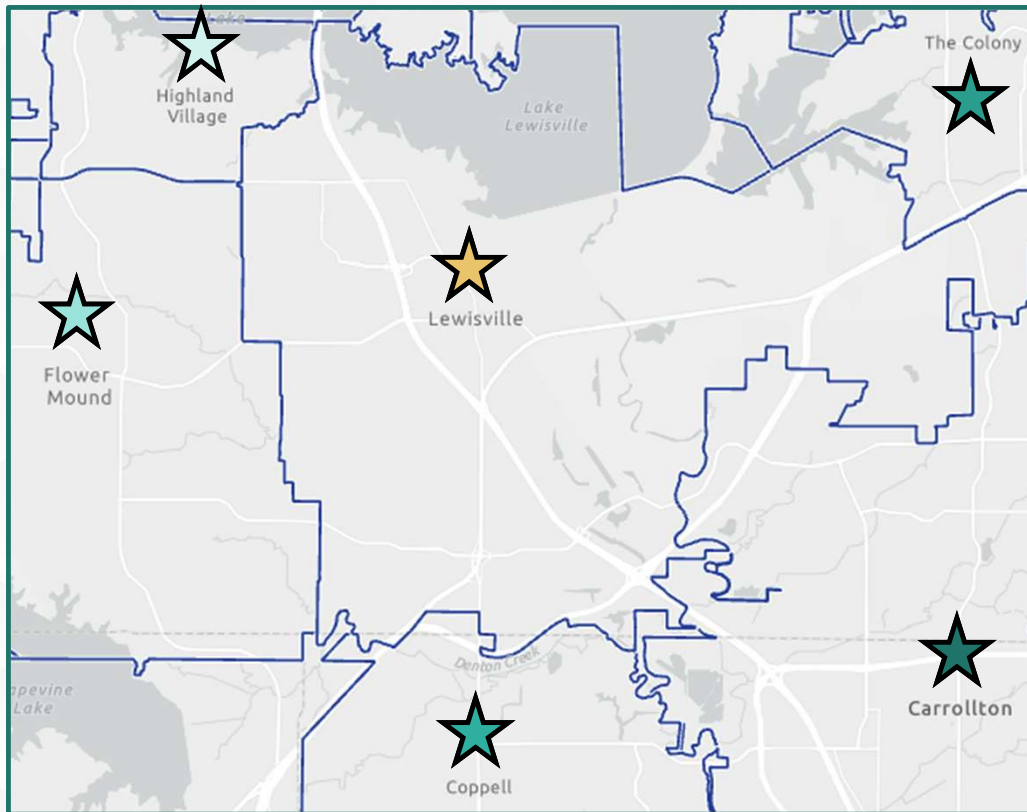


# LEWISVILLE SALES TAX MAKEUP





# NEIGHBORING SALES TAX PERFORMANCE



- ★ Lewisville: +1.33%
- ★ Carrollton: -1.41%
- ★ The Colony: -2.62%
- ★ Coppell: +0.40%
- ★ Flower Mound: +1.50%
- ★ Highland Village: +0.57%

\*Data includes city portion of tax (no special districts) collections from December 2023 to November 2024. Since collections are two months behind, this data corresponds with FY 2024.





# SALES TAX LITIGATION STATUS



- **July 2021** – Lawsuit was filed by the *Coalition for Appropriate Sales Tax Law Enactment (CASTLE)*. City of Coppel, Texas; the City of Humble, Texas; the City of DeSoto, Texas; the City of Carrollton, Texas; the City of Farmers Branch, Texas; and the City of Round Rock, Texas v. Glenn Hegar
- **August 2021** – Parties agreed on a temporary injunction, provisions of Rule 3.334 would not be implemented until final disposition on the litigation.
  - During the injunction period, the Comptroller introduced multiple amendments to refine definitions and meet procedural requirements. The provisions of Rule 3.334 remain unenforced throughout the injunction period.
- **May 2024** – Original trial date.
- **October 2024:** New trial date set.
  - Bench trial took place during the week of October 14th
- **December 2024:** Decision issued December 3rd
  - Ruling favored CASTLE and Round Rock, with the Comptroller being “permanently enjoined” from enforcing relevant sections of Rule 3.334
  - Some ambiguity remains in the ruling’s wording, prompting a request for clarification through a “Motion to Modify”
  - Expected a ruling by the end of the year, no updates have been provided as of today



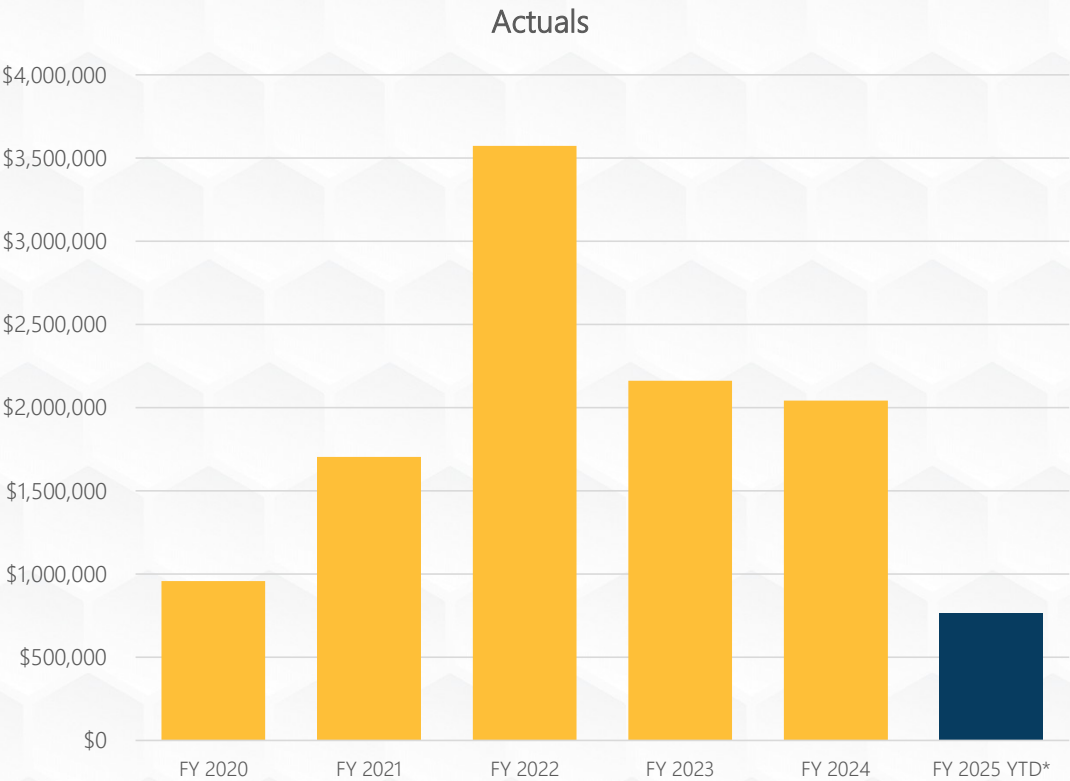
Building permit revenue is based on actual projects the City is aware of. Smaller permit revenue sources are typically not budgeted but add a small revenue boost each year.

FY 2024 actuals ended the year \$119k less than the year before, but \$341k more than the mid-year FY 2024 estimate.

Projects scheduled to occur in FY 2025 include Lakeside Crossing Multifamily and Townhomes and Valley Parkway Business Park.

As of early February, FY 2025 actuals are already close to \$800k.

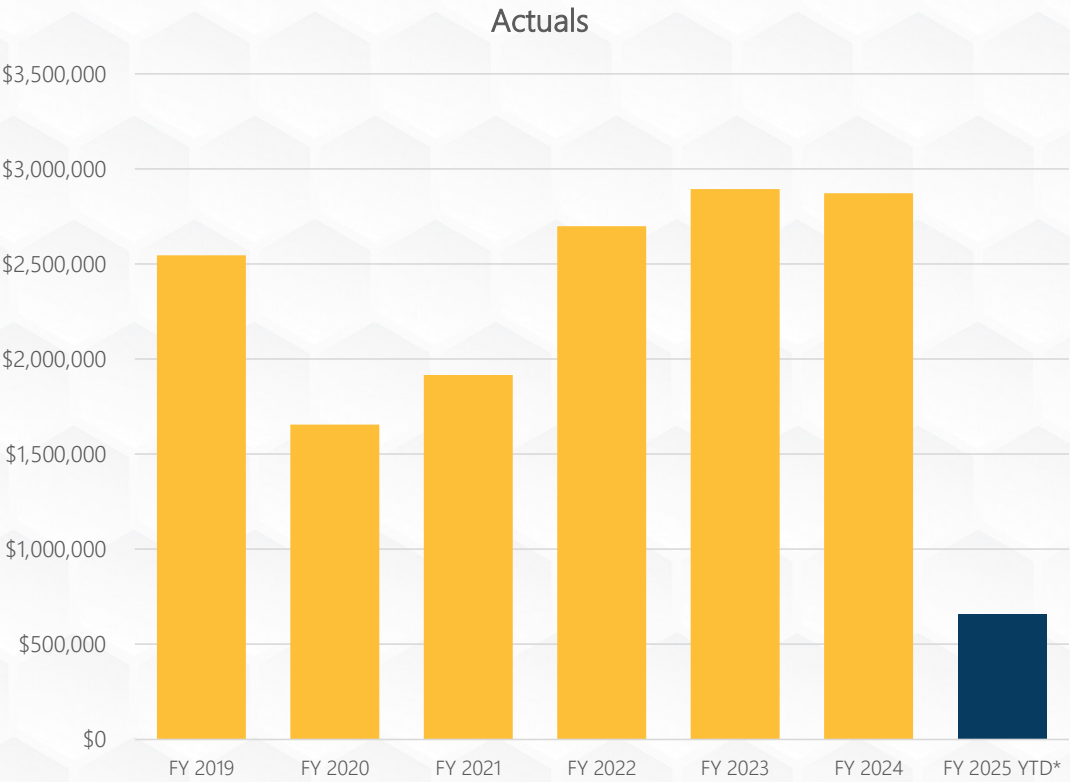
# BUILDING PERMITS



\*Data as of 2/5/2025.



# HOTEL/MOTEL TAX REVENUE



\*Data as of 2/5/2025.

FY 2024 actuals came in only \$22.5k less than the prior year, despite seeing a somewhat larger drop in occupancy rates.

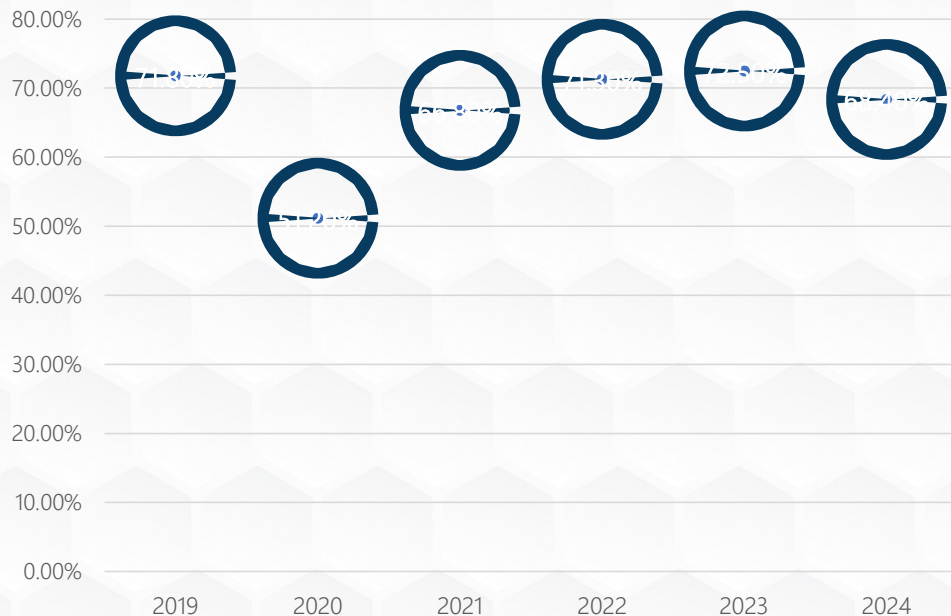
The City began collecting hotel occupancy taxes from short-term rentals in August 2024. This amounted to \$7,668 for those few months in FY 2024.

As of early February, FY 2025 STR hotel occupancy tax revenue amounts to \$33,369.



# HOTEL/MOTEL OCCUPANCY RATES

Occupancy Rates



\*Data through December 2024.

Number of hotels has not changed from 2023 to 2024, but total number of rooms has increased (hotels only, not including short-term rentals).

↑ Change in supply: **10,920** more room nights available than last calendar year.

↓ Change in demand: **23,152** less rooms nights demanded compared to last calendar year.

Result: More supply and less demand is contributing to decreasing occupancy rates. More importantly, though, this seems to be a regional pattern. Other DFW cities have experienced similar declines.

However, revenue has not been impacted to the same extent as demonstrated on the previous slide.



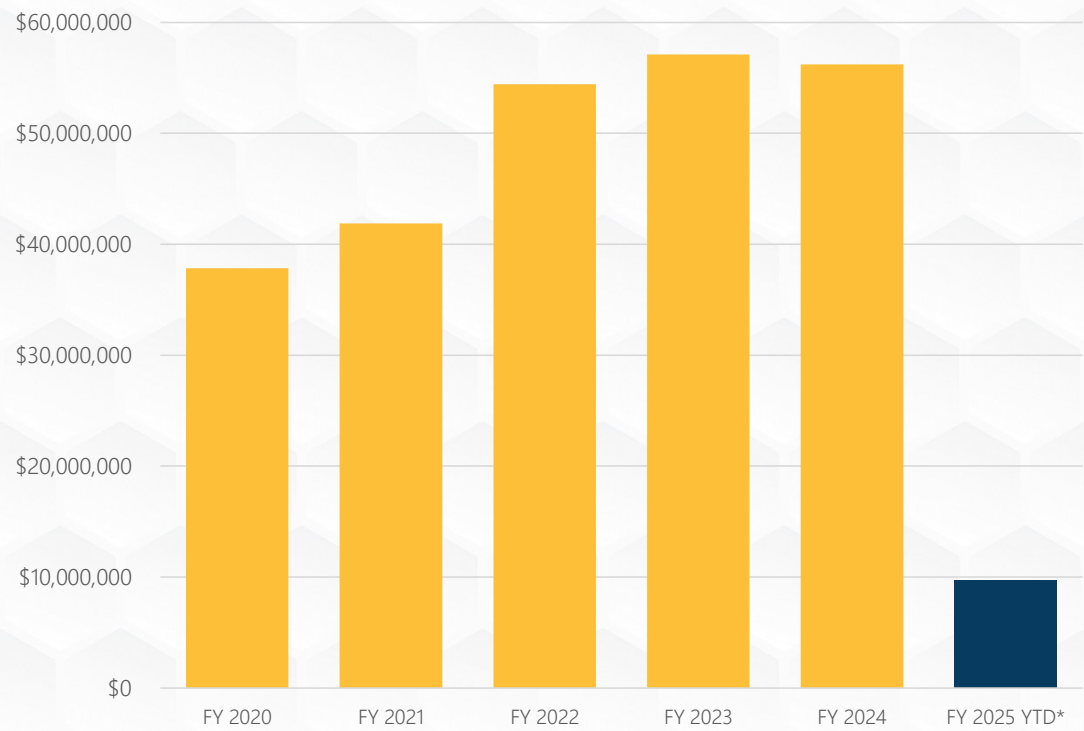
FY 2024 actuals slightly decreased by 1.6%, or \$903k when compared to the prior year's actuals. This is mostly due to FY 2024 being a rainier and cooler year than FY 2023. Despite this, actuals still came in \$4.4M more than the conservative adopted budget (due to water sales, capital recovery fees, and interest earnings).

For FY 2025, City Council approved an overall 9.7% increase for water and sewer rates.

Utility Fund revenues are heavily influenced by the weather, with hot and sunny days resulting in more water use and rainy days resulting in low water use. For this reason, this revenue source is closely monitored throughout the year.

# UTILITY FUND REVENUE

Actuals – Overall Fund



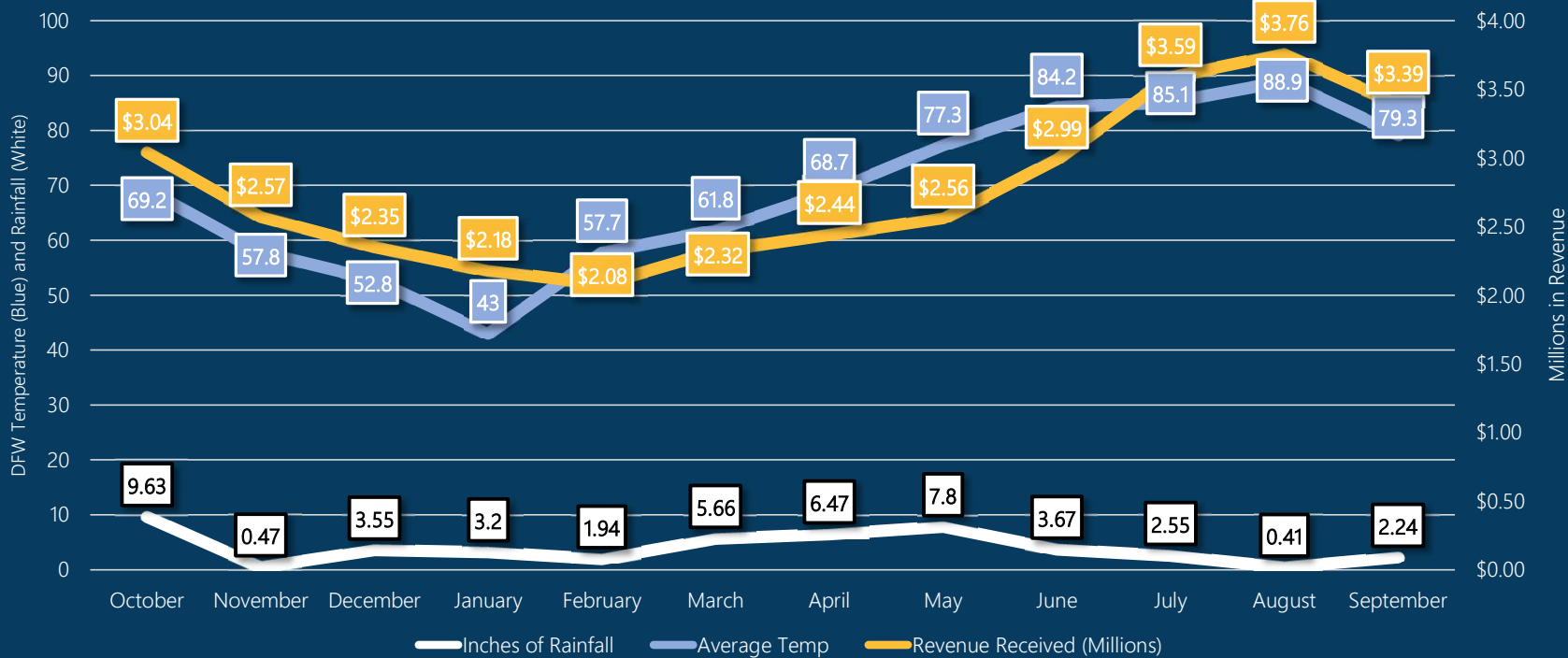
\*Data as of 2/5/2025.



# FY 2024 WEATHER DATA AND REVENUES

## Weather vs. Water Sales

\*Revenue data has been adjusted forward one month to reflect the revenue received for the month in which the temperature data and rain took place.



Average # of  
100-degree  
days: 20

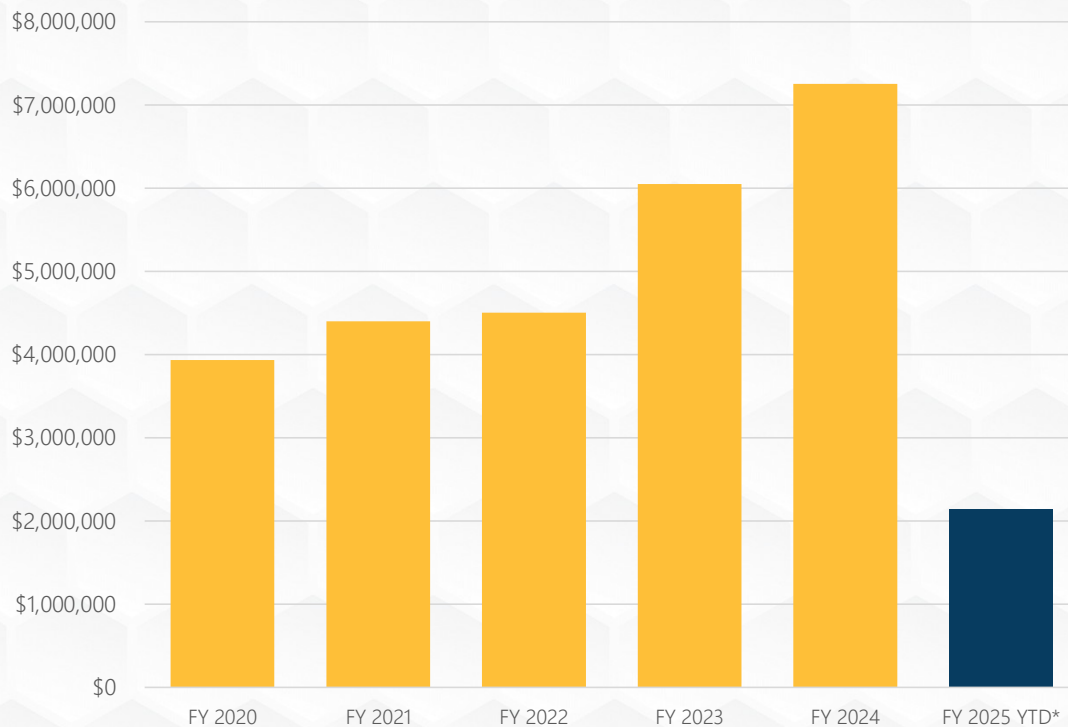
FY 2023: 55

FY 2024: 23



# DRAINAGE FUND REVENUE

Actuals – Overall Fund



\*Data as of 2/5/2025.

FY 2024 actuals increased by 19.9% or \$1.2M when compared to the prior year's actuals. This is also \$293k above the mid-year FY 2024 estimates (mostly due to interest earnings).

This is due to a rate increase, as well as continued new development in the City.

For FY 2025, City Council approved a \$1.00 per month rate increase for single-family residential and a \$0.36 per 1,000 square feet rate increase for non-single family. The 2022 NewGen drainage study called for a \$1.00 increase annually. The current year, FY 2025, is the final year of a three-year plan for drainage fee rate adjustments.





# ECONOMIC SUMMARY



- As the various economic indicators reflect, the revenue outlook for the City of Lewisville for the remainder of the current fiscal year is positive, but trends in sales tax revenue and hotel occupancy rates will need to be kept under observation.
- We will continue to monitor inflation rates and how they impact costs. In addition, we will keep apprised of interest rates and how they may impact borrowing power.





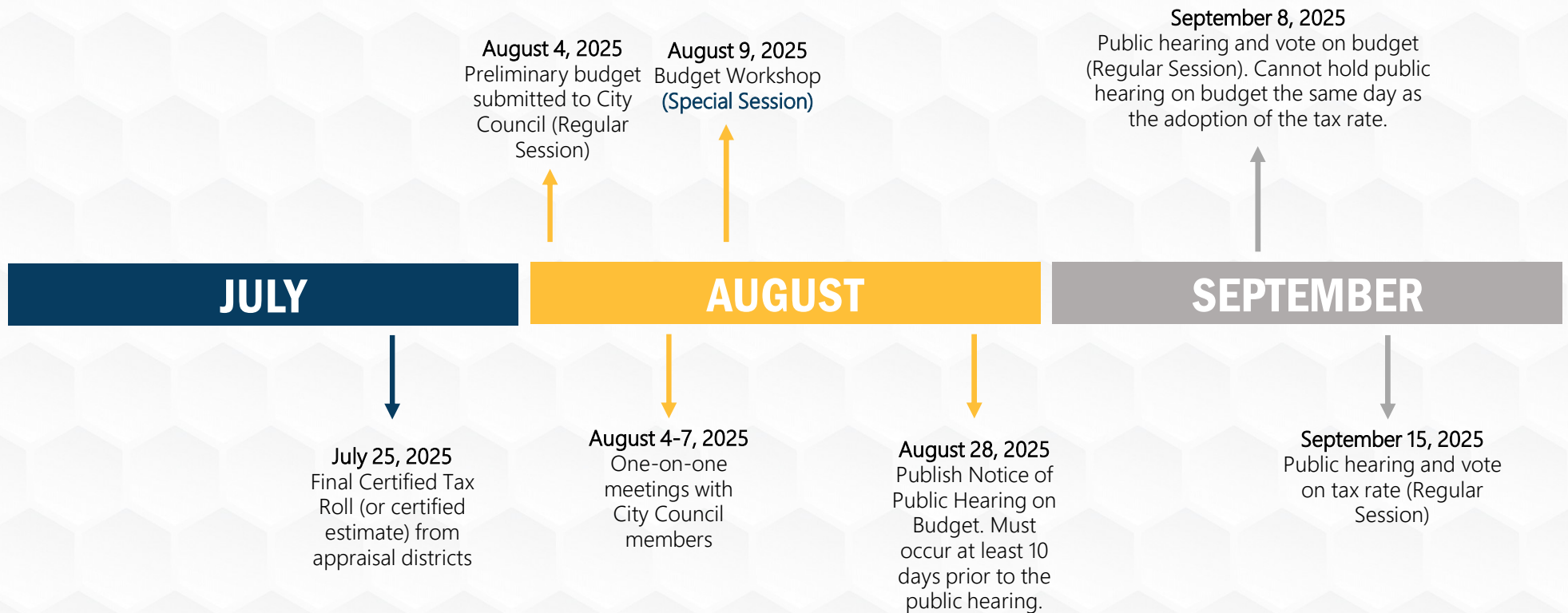
# BUDGET CALENDAR DISCUSSION



- Staff brings the budget calendar to City Council each year during retreat to determine if the calendar should include the option for an election.
- The budget calendar is based on state law and regularly-scheduled City Council meetings. State law requires different deadlines depending on whether or not an election will be called to increase the property tax rate more than 3.5% above the effective tax rate.

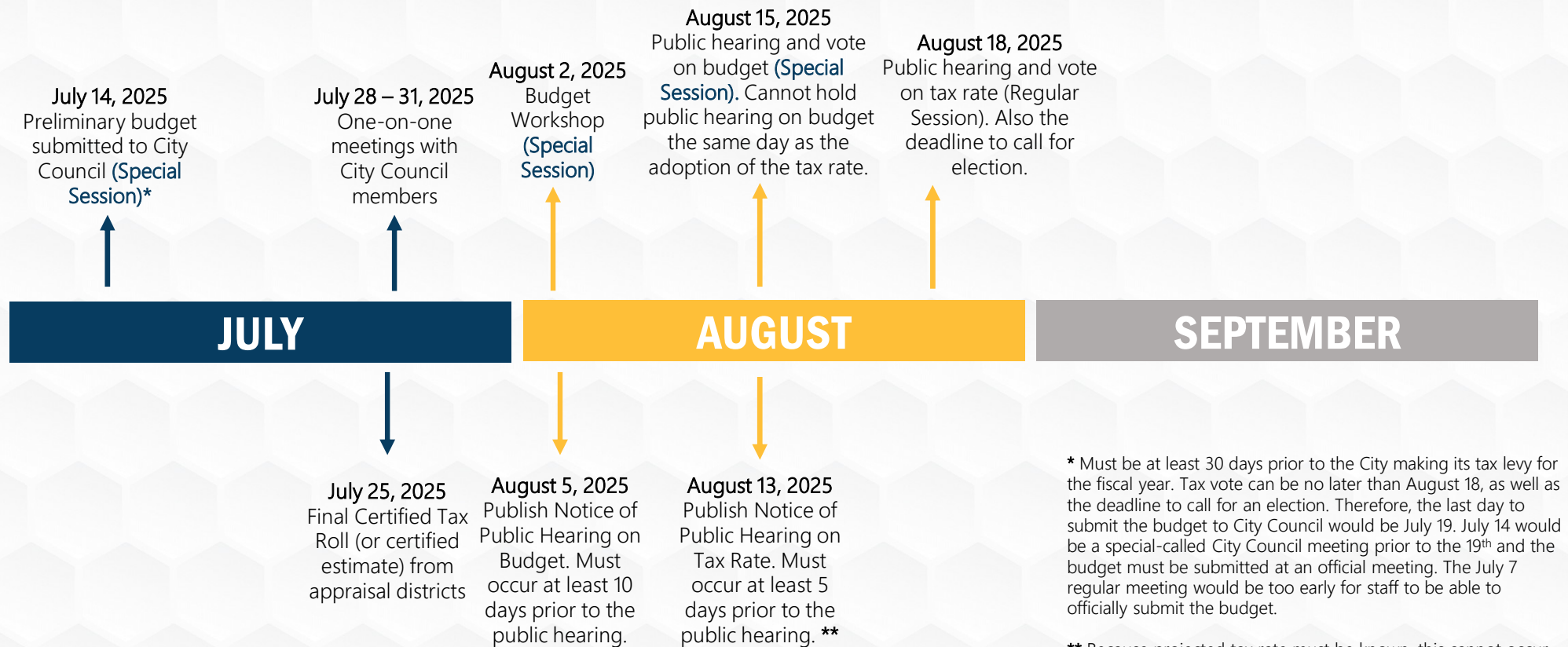


# BUDGET CALENDAR – NO ELECTION





# BUDGET CALENDAR – ELECTION OPTION







# STAFF RECOMMENDATION



- Expecting property tax revenue increase
- Most other major revenue sources continue to trend upward
- Staff will continue performing cost recovery audits to assess fees and charges for services to determine whether the City is appropriately recovering costs associated with providing these services
- Based on these economic trends and operational priorities, staff's recommendation is to proceed **without** the option of an election for FY 2026.