CITY COUNCIL MEETING & PUBLIC HEARING
MAY 4, 2026

ALPHARETTA CITY HALL
COUNCIL CHAMBERS
2 PARK PLAZA
6:30 PM

1. CALL TO ORDER

2. ROLL CALL

3. PLEDGE TO THE FLAG

4. PRESENTATIONS & PROCLAMATIONS

A. Proclamation: Alpharetta High School Indoor Percussion Team

B. Proclamation: Public Works Week 2026

5. CONSENT AGENDA

A. City Council Meeting Minutes (Meeting of 04/27/2026)
Approval of the City Council meeting minutes from the meeting of April 27, 2026.

6. PUBLIC HEARING

A. Announcement of Public Hearing Procedures

B. MP-26-03/CLUP-26-01/Z-26-01/CU-26-05/V-26-02 TPG Brookside West
Consideration of a master plan amendment, comprehensive land use plan amendment, rezoning, conditional use, and variances to allow for the redevelopment of a 5 story, 130,828 square foot office building with 104 'For-Sale' townhomes on 8.76 acres in the Brookside Master Plan. A master plan amendment is requested to the Brookside Master Plan Pod A to allow the proposed development and add it to the Portman Brookside mixed-use development. A comprehensive land use plan amendment is requested from 'Corporate Office' to 'Mixed Use' and a rezoning is requested from O-I (Office-Institutional) to MU (Mixed Use). A conditional use is requested to allow 'Dwelling, 'For-Sale', Attached' and variances are requested from Unified Development Code (UDC) Subsection 2.2.20(B) to reduce the minimum office percentage and UDC Subsection 3.2.8(B)(1)(a) to modify the 50' undisturbed buffer to a 15' planted buffer. The property is located at 3650 Brookside Parkway and is legally described as being located in Land Lots 43 & 44, 1st District, 1st Section, Fulton County, Georgia.

C. Ordinance: Alcohol Ordinance Text Amendments
DEFERRED: This item has been deferred by staff to the June 1, 2026 City Council meeting and will not be considered at this meeting.
Consideration of an Ordinance to amend Chapter 4 of the Code of the City of Alpharetta, referred to as Alcoholic Beverages, to amend the provisions related to definitions; inspections of licensed establishments; condition of premises; licensing qualifications; excise taxes; renewal of licenses; transfer of licenses; purchases from wholesalers; revocation, suspension or other penalties; hearing and appeal procedures; hours of sale; and for other purposes.

7. NEW BUSINESS

A. Resolution: Revised Employee Manual and Benefits Handbook
Consideration and approval of a Resolution adopting the revised Employee Manual and Benefits Handbook.

B. Resolution: Formalizing Administrative Updates to the Employee Manual and Benefits Handbook
Consideration and approval of a Resolution formalizing the administrative update process and its defined conditions for the Employee Manual and Benefits Handbook.

C. **Resolution: Appointment of Code Enforcement Board Member**
Consideration and adoption of a Resolution to appoint Carlos Campos as a member of the Code Enforcement Board.

D. **Ordinance: Offenses and Miscellaneous Provisions Ordinance Text Amendments**
DEFERRED: This item has been deferred by staff to the May 18, 2026 City Council meeting and will not be considered at this meeting.

SECOND READING: The first reading of this item occurred during the April 27, 2026 City Council meeting.
Consideration and approval of an Ordinance to amend Chapter 30, referred to as Offenses and Miscellaneous Provisions, of the Code of the City of Alpharetta to amend provisions regarding the discharge of firearms; to amend provisions regarding urban camping and the improper use of property; to regulate the discharge of bows and crossbows; to prohibit interference of a city officer; to prohibit false representations to a city officer; to prohibit loitering and prowling; to prohibit trespass; to prohibit street racing and reckless driving exhibitions; to prohibit vandalism; to prohibit aggressive panhandling; to prohibit public drunkenness; to provide for traffic violations for disobeying or avoiding an official traffic control device; to prohibit public urination or defecation; to prohibit creating a disturbance at schools; to provide for enforcement; to provide for penalties for violations; to repeal conflicting ordinances; and for other purposes.

8. **WORK SESSION ITEMS**

A. **Alpharetta Rental Housing Study Update Presentation**
The City of Alpharetta engaged KB Advisory Group to examine the historical relationship between rental and owner housing in the City and analyze the potential proportion of future rental housing in Alpharetta to be consistent with the 2040 Comprehensive Plan. Housing Policy 2 of the comprehensive plan seeks to maintain a balance between 'owner-occupied' and 'renter-occupied' in Alpharetta such that at least 68% of the housing stock is 'owner-occupied'. Geoff Koski, KB Advisory Group, will present an overview of the Alpharetta Rental Housing Study Update, December 2025.

B. **Fiscal Year 2027 Budget**
Discussion of the upcoming FY 2027 budget.

9. **PUBLIC COMMENT**

10. **REPORTS**

11. **EXECUTIVE SESSION (IF NECESSARY)**

12. **ADJOURNMENT**

A PROCLAMATION
BY THE MAYOR AND COUNCIL OF THE CITY OF ALPHARETTA, GEORGIA

"RECOGNIZING THE ALPHARETTA HIGH SCHOOL INDOOR PERCUSSION ENSEMBLE FOR WINNING THE 2026 WINTER GUARD INTERNATIONAL WORLD CHAMPIONSHIP"

WHEREAS: The Alpharetta High School Indoor Percussion Ensemble, made up of 36 dedicated student musicians, invested countless hours in rehearsals and performances throughout the 2026 season, consistently demonstrating commitment, talent, and pride in representing their school and community; and

WHEREAS: In their first-ever appearance at the Winter Guard International (WGI) World Championship in Dayton, Ohio, the ensemble delivered an exceptional preliminary performance, finishing with the highest score of the day and establishing a strong lead over the national field; and

WHEREAS: The ensemble continued to excel through semifinals and finals, ultimately earning a finals score of 97.850—one of the highest in class history—and securing **1st place** and the title of **2026 WGI Scholastic A World Champions**, marking a historic achievement for Alpharetta High School and the State of Georgia; and

WHEREAS: This outstanding accomplishment reflects the dedication of the students, the leadership of their instructional staff and designers, and the support of the Alpharetta Band Boosters, the Alpharetta High School community, and school administration, all of whom contributed to the ensemble's success.

NOW THEREFORE: We, the Mayor and City Council of the City of Alpharetta, proudly recognize and commend the Alpharetta High School Indoor Percussion Ensemble for their remarkable national debut and world championship title, and for representing the City of Alpharetta with excellence and integrity.

SO PROCLAIMED: This 4 day of May 2026, by the Mayor and City Council of the City of Alpharetta, Georgia.

_____

Jim Gilvin
Mayor of the City of Alpharetta

_____

Grace Orehosky
Acting City Clerk for the City of Alpharetta

A PROCLAMATION
BY THE MAYOR AND CITY COUNCIL OF THE CITY OF ALPHARETTA, GEORGIA

PUBLIC WORKS WEEK: MAY 17 – 23, 2026

WHEREAS: Public Works professionals focus on infrastructure, facilities, and services that are of vital importance to sustainable and resilient communities, and also to the public health, high quality of life, and well-being of the people of the City of Alpharetta; and

WHEREAS: These infrastructures, facilities, and services could not be provided without the dedicated efforts of public works professionals, who are engineers, managers, and employees at all levels of government and the private sector, and responsible for rebuilding, improving, and protecting our nation's transportation, water supply, water treatment, solid waste systems, public buildings, and other structures and facilities that are essential for citizens; and

WHEREAS: It is in the public interest for our residents, business professionals, and visitors to the City of Alpharetta to gain knowledge of and to maintain ongoing interest and understanding of the importance of public works and public works programs in their respective communities; and

WHEREAS: This year's Public Works Week, with the theme "Rooted in Service, Powered by Community," marks the 66th annual National Public Works Week sponsored by the American Public Works Association; and

NOW, THEREFORE: We, the Mayor and City Council of the City of Alpharetta do hereby proclaim May 17 through 23, 2026 to be "Public Works Week" in the City of Alpharetta, and urge all citizens to join with representatives of the American Public Works Association and government agencies in activities, events, and ceremonies designed to pay tribute to our public works professionals, engineers, managers, and employees and to recognize the substantial contributions they make to protect our health, safety, and quality of life.

SO PROCLAIMED: This 4th day of May 2026, by the Mayor and City Council of the City of Alpharetta, Georgia.

_____

Jim Gilvin
Mayor of the City of Alpharetta

_____

Grace Orehosky
Acting City Clerk for the City of Alpharetta

STAFF REPORT

Department: City Clerk
Submitted By: Grace Orehosky
Meeting Date: May 4, 2026

AGENDA ITEM:

City Council Meeting Minutes (Meeting of 04/27/2026)
Approval of the City Council meeting minutes from the meeting of April 27, 2026.

STAFF RECOMMENDATION:

Approve, as part of the Consent Agenda, the minutes for the April 27, 2026 City Council meeting.

BUDGET & PROCUREMENT:

BUDGETED ITEM: NO
FISCAL IMPACT: NO
INCLUDED IN CURRENT FY CPTL BUDGET: NO
INCLUDED IN CURRENT FY OPRT. BUDGET: NO
TOTAL PROJECT COST:
APPROPRIATIONS:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

EXTERNAL FUNDING SOURCES:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

ITEM DESCRIPTION:

Acting City Clerk, Grace Orehosky, prepared a synopsis of the pertinent information that occurred during the City Council meeting on April 27, 2026.

ALTERNATIVES:

Do not approve the City Council meeting minutes as part of the Consent Agenda and consider as a New Business item.

ATTACHMENTS:

1. 2026-04-27 CC Minutes

City Council Meeting & Public Hearing
APRIL 27, 2026
UNOFFICIAL MINUTES
Office of the City Clerk

ALPHARETTA CITY HALL
COUNCIL CHAMBERS | 2 PARK PLAZA | 6:30 PM

This summary is provided as a convenience and service to the public, media and staff. It is not the intent to record proceedings verbatim. Any reproduction of this summary must include this notice. This is not an official record of the Alpharetta City Council Meeting proceedings. Meetings are recorded and available for review at https://www.youtube.com/user/alpharettagov.

1. **CALL TO ORDER**
   - Mayor Gilvin called the meeting to order at 6:30 p.m.
2. **ROLL CALL**
   - **Council Members:**
     - **Present**
       - Mayor Jim Gilvin
       - T. Kirk Driskell
       - Katie Reeves
       - Douglas J. DeRito
       - John Hipes
       - Fergal M. Brady
     - **Absent:**
       - Mayor Pro Tem Dan Merkel
   - **Staff**
     - Chris Lagerbloom, City Administrator
     - John Robison, Assistant City Administrator
     - Molly Esswein, City Attorney
     - Grace Orehosky, Acting City Clerk

- Deanna McKay, Public Communication & Engagement Coordinator
- Kathi Cook, Director of Community Development
- Morgan Rodgers, Director of Recreation, Parks, and Cultural Services
- Pete Sewczwicz, Director of Public Works
- Tom Harris, Director of Finance
- Trent Lindgren, Chief of Police
- Brad Dekinger, Fire Chief
- Cris Randall, Director of Human Resources
- Charlie Jewell, Director of Economic Development
- Brooke Lappin, Director of Courts
- David Shostak, City Arborist
- Erik Wideman, IT Network Manager

3. PLEDGE TO THE FLAG

4. BOARDS & COMMISSIONS

   A. Swearing in of Natural Resources Commission Member by Mayor Gilvin

      - This item was delayed at its original scheduled time, due to the late arrival of the appointee. The item later occurred following Public Hearing Item B, V-26-07 Alpharetta District Places Phase 1, and prior to Public Hearing Item C, Ordinance: Offenses and Miscellaneous Provisions Ordinance Text Amendments.
      - Mayor Gilvin swore in Nivedita Ranade as a new alternate member of the Natural Resources Commission.

5. PRESENTATIONS & PROCLAMATIONS

   A. Presentation: New Fulton County Health & Human Services – North Facility

      - Dr. Pamela Roshell, Fulton County Chief Operating Officer, presented an update on the services provided at the new Fulton County Health & Human Services North Facility.

   B. Proclamation: Public Service Week 2026

- Mayor Gilvin presented a proclamation to Director of Human Resources, Cris Randall, to recognize and thank the employees of the City of Alpharetta.

6. CONSENT AGENDA

A. City Council Special Called Meeting Minutes (Meeting of 4/13/2026)

Consideration and approval of the City Council special called meeting minutes from the special called meeting of April 13, 2026.

B. Financial Management Report (Month Ending February 28, 2026)

Consideration and approval of the Financial Management Report for the month ending February 28, 2026.

C. Final Order & Judgement: Windward Parkway Pedestrian Bridge and Windward Parkway Drainage Modification Project – Parcel 4

Consideration of approval of the ratification of a Consent Order and Final Judgment in the total amount of $30,000 for Tax Parcel No. 21 561011050280 in the Windward Parkway Pedestrian Bridge and Windward Parkway Drainage Modification Project, Parcel 4, Property Owner: Windward Community Services Association, Inc.

D. Easement Agreements: Sawnee Electric Membership Corporation – McGinnis Ferry Road

Consideration and approval of the ratification of two Right of Way Easement Agreements with Sawnee EMC for the McGinnis Ferry Phase 2 Project 0021232, Parcels 5 and 6 to place two power poles and install approximately 200 feet of underground power, and with authorization for the Mayor to execute all necessary documents.

PUBLIC COMMENTS:

- There were no public comments.

❖ Council Member Hipes offered a motion to approve the consent agenda.

- Council Member Brady seconded the motion.
- The motion was approved unanimously (6-0).

7. PUBLIC HEARING

A. Announcement of Public Hearing Procedures

- City Attorney, Molly Esswein, read the public hearing procedures aloud.

B. V-26-07 Alpharetta District Places Phase 1

Consideration of a variance request to allow a specimen tree to be removed along Marietta Street. A variance is requested to Unified Development Code (UDC) Subsection 3.2.8(K) to allow a specimen tree in the building setback along Marietta Street to be removed. The property is located at 131 South Main Street and 82 Marietta Street and is legally described as being located in Land Lots 695 & 1269, 1st District, 2nd Section, Fulton County, Georgia.

- Director of Community Development, Kathi Cook, came forward to present this item.
- The applicant, Erik Rowen, is requesting a variance to allow a specimen tree to be removed in the building setback along Marietta Street. The applicant proposes to construct Phase 1 of the Alpharetta District Places development, which includes approximately 17,700 square feet of retail use and 17,700 square feet of restaurant use on 5.34 acres in the Downtown. The subject property is located at 82 Marietta Street and 131 South Main Street near the southeast corner of Roswell Street and Marietta Street.
- Staff recommends that Mayor and Council approve V-26-07 Alpharetta District Places Tree Variance, subject to the following conditions:

    1. Developer shall be permitted to remove tree #41 (54" Water Oak). Recompense shall consist of the following:

        a. The size of the 5 overstory trees along Roswell Street shall be increased from 4" to 6" caliper;

        b. The size of the 3 overstory trees along Marietta Street shall be increased from 4" to 6" caliper; and

        c. Reconstruct approximately 70' of the Alpha Loop installed along the frontage of the Alpharetta District Places development along Roswell Street in order to create a planter to allow for overstory tree plantings. The scope shall include demolition of the mis-aligned section and repouring of the Alpha Loop and tree installation.

    2. Developer shall improve Marietta Street streetscape with a minimum 6' planter planted with street trees, minimum 8' sidewalk, curb and gutter (or as approved by Staff), decorative pedestrian lighting and street furnishings, with final approval by

Staff. Overhead utilities along the project side of Marietta Street may require relocation or placement underground in order to resolve conflicts with Code-required landscaping. Streetscape improvements may require additional right-of-way or easements. Streetscape improvements shall be installed using specific construction techniques, such as a floating sidewalk, to limit impacts to saved trees, as approved by Staff.

3. Developer shall install the City's Alpha Loop Special Detail striping at the Marietta Street/Roswell Street intersection pedestrian crosswalks, with final approval by Staff. Impact fee credits shall be used to develop off-site improvements if approved by Council as part of a development agreement.

4. Overstory shade trees shall be required in all landscape strips and shall be planted a minimum 15' from the face of the building and a minimum 15' from overhead utilities, as approved by DRB.

5. Applicant shall install signage and it shall be stated in the leases for the development that delivery trucks in excess of SU30 (6-wheel box truck) shall not use Marietta Street for ingress/egress.

- The submitted request, if approved, would allow for a specimen tree to be removed in the building setback along Marietta Street. The applicant proposes to construct Phase 1 of the Alpharetta District Places development, which includes approximately 17,700 square feet of retail use and 17,700 square feet of restaurant use on 5.34 acres in the Downtown. The subject property is located at 82 Marietta Street and 131 South Main Street near the southeast corner of Roswell Street and Marietta Street.

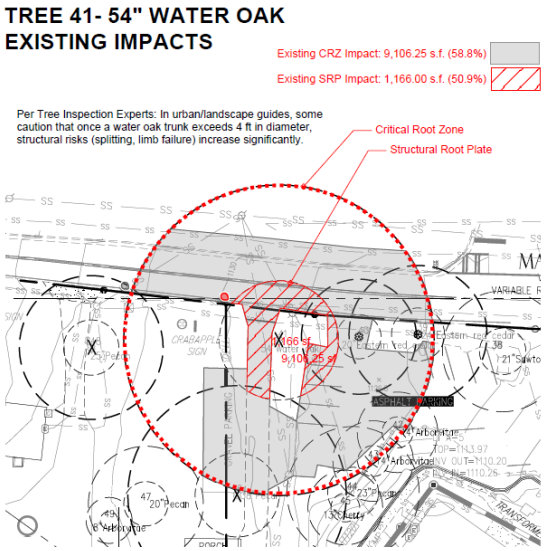
- The property is developed as a 20,000 square foot retail strip center, 4,200 square foot dry cleaners, and 2,400 square foot contractor's office. Surrounding properties are zoned C-2. Pure Taqueria, Next to Pure and Empire Homes offices are located to the west, Walgreens and Zaxby's are located to the south, the former Off Leash, Little Alley Steak, and Taco Bell are located to the east, and Surcheros and a commercial building are located to the north. The comprehensive land use plan designation of the property is 'Central Business District'.

- A variance is requested to Unified Development Code (UDC) Subsection 3.2.8(K) tree conservation and landscape requirements. The applicant cites the unusual shape of the

property, multiple road frontages, and the substandard right-of-way along Marietta Street as hardships contributing to the requested variance.

- There is a four-foot (4') sidewalk on the north side of Marietta Street and no sidewalk on the south side. Construction necessary to install the planter and sidewalk on the south side of Marietta Street will be within the structural root plate (SRP) and critical root zone (CRZ) of tree #41.

- The applicant submitted a tree assessment for tree #41 (54" Water Oak). The exhibit below depicts existing impacts (50.9%) to the structural root plate (SRP), as well as existing impacts (58.8%) to the critical root zone (CRZ) of tree #41. The arborist assessment gives the tree a risk rating of 'Moderate' and recommends that tree preservation would require a comprehensive tree care prescription (soil decompaction, mulching, PHC program, deadwood pruning) and full-time arborist oversight during demolition and construction to minimize root impacts. If significant encroachment into the CRZ is necessary during construction, it is recommended by the applicant's arborist and the City Arborist that the tree be removed.



- The City hired Bartlett Tree Experts to perform an assessment on tree #41. Bartlett, like the applicant's arborist, gave the tree a 'Moderate' risk rating. To lower the risk rating to 'Low', Bartlett recommended deadwood pruning, pruning to reduce the end weight on the main leaders, and cabling to limit branch movement. This recommendation is based on the current condition of the tree and does not assume future impacts from the construction of the applicant's proposed development and installation of the required streetscape along Marietta Street.

- The applicant also requests that in lieu of paying the required recompense for the removal of tree #41, that the following improvements be used to compensate for the removal of the tree:

    1. Increase the size of the five (5) proposed overstory trees along Roswell Street from 4" to 6" caliper;

    2. Increase the size of the three (3) proposed overstory trees along Marietta Street from 4" to 6" caliper; and

    3. Reconstruct approximately 70' of the Alpha Loop installed along the frontage of the Alpharetta District Places development along Roswell Street in order to create a planter to allow for overstory tree plantings. The scope would include demolition of the mis-aligned section and repouring of the Alpha Loop and tree installation.

- The UDC requires recompense for specimen trees that cannot be saved equal to three (3) times the caliper inches of the tree. Therefore, removal of tree #41 would require recompense of 162 caliper inches, or 40.5, four-inch (4") caliper trees. The applicant's alternate recompense proposes sixteen inches (16") of recompense plantings, as well as to correct a portion of the Alpha Loop that was installed along the property's frontage on Roswell Street. The City Arborist recommends $300/caliper inch when paying into the tree bank. Therefore, a balance of $43,800 would be owed by the applicant. According to the City's Public Works Department, the construction cost for the installation of the Alpha Loop along Roswell Street was approximately $700/linear foot. Therefore, the cost of the proposed reconstruction of the Alpha Loop along the property's frontage would exceed the recompense balance for the removal of specimen tree #41.

- The Citizen Participation Plan Report submitted by the applicant states that property owners within 500' were contacted regarding the applicant's intent. The report states that no comments were received.

- Community Zoning Information Meeting was held on April 8, 2026. There were public comments with concerns over increased traffic and noise, as well as the size of the development.

- Staff has reviewed the applicant's proposal against the established review criteria for a variance. The property has peculiar conditions related to the existing impacts to the tree,

the close proximity of the tree to Marietta Street, and the sub-standard right-of-way along Marietta Street. Tree #41 is located approximately fifteen feet (15') from the right-of-way line along Marietta Street. Installation of the required streetscape improvements will further impact the tree. The applicant's arborist and City Arborist have concluded that any additional impacts to the tree from construction or demolition activities would negatively impact the tree to the point that it should be removed.

- The applicant, Erik Rowen, and Civil Landscape Engineer, Jennifer Sprayberry, came forward in support of the application.
- The applicant, Erik Rowen, provided rebuttal to the public comments.

CITY COUNCIL DISCUSSION:

- Council Member DeRito asked staff why this tree is being discussed as part of this current project, since the tree is outside the parameters of this Phase 1 project.
- Council Member DeRito asked staff if the tree in question is on property owned by a different group or the same group.
- Council Member DeRito asked City Attorney, if the City should be considering approval of a tree removal on this request and as part of this project, since it resides on a different plot of land than the current Phase 1 application.
- Council Member Brady asked staff when the City's planned road and sidewalk improvements to Marietta Street will occur, if they will happen close in time to when the developer of this property will be improving the road and sidewalk, and if the future widening of Marietta Street will be accounted for when the sidewalk is installed.
- Council Member Reeves asked staff about installation of the sidewalk and trees, and if developers install lighting on their property.
- Council Member Hipes asked staff about what the recompense for the tree is.

PUBLIC COMMENTS:

- Michael Buchanan, 135 Pebble Trace, Alpharetta, GA 30009, came forward to speak in opposition to the application.
- Taylor Melesh, 365 Rainey Circle, Alpharetta, GA 30009, came forward to speak in opposition to the application.

- Council Member Hipes offered a motion to approve V-26-07 Alpharetta District Places Phase 1, subject to the following conditions:

  1. Developer shall be permitted to remove tree #41 (54" Water Oak). Recompense shall consist of the following:

     a. The size of the 5 overstory trees along Roswell Street shall be increased from 4" to 6" caliper;

     b. The size of the 3 overstory trees along Marietta Street shall be increased from 4" to 6" caliper; and

     c. Reconstruct approximately 70' of the Alpha Loop installed along the frontage of the Alpharetta District Places development along Roswell Street in order to create a planter to allow for overstory tree plantings. The scope shall include demolition of the mis-aligned section and repouring of the Alpha Loop and tree installation.

  2. Developer shall improve Marietta Street streetscape with a minimum 6' planter planted with street trees, minimum 8' sidewalk, curb and gutter (or as approved by Staff), decorative pedestrian lighting and street furnishings, with final approval by Staff. Overhead utilities along the project side of Marietta Street may require relocation or placement underground in order to resolve conflicts with Code-required landscaping. Streetscape improvements may require additional right-of-way or easements. Streetscape improvements shall be installed using specific construction techniques, such as a floating sidewalk, to limit impacts to saved trees, as approved by Staff.

  3. Developer shall install the City's Alpha Loop Special Detail striping at the Marietta Street/Roswell Street intersection pedestrian crosswalks, with final approval by Staff. Impact fee credits shall be used to develop off-site improvements if approved by Council as part of a development agreement.

  4. Overstory shade trees shall be required in all landscape strips and shall be planted a minimum 15' from the face of the building and a minimum 15' from overhead utilities, as approved by DRB.

5. Applicant shall install signage and it shall be stated in the leases for the development that delivery trucks in excess of SU30 (6-wheel box truck) shall not use Marietta Street for ingress/egress.

- Council Member DeRito seconded the motion.
- There was the following discussion during the motion:
  - Council Member DeRito shared that while he is in support of the project, he understands the frustrations of the residents regarding the removal of a specimen tree.
  - Council Member Reeves shared that the widening of Marietta Street and adding sidewalks for safety is the priority.
  - Council Member Hipes shared that the City's requirements that the developer make improvements to Marietta Street will cause the encroachment on the root zone of the tree and that the arborist reports state the health of the tree is moderate at best and will be further compromised by the construction.
- The motion was approved unanimously (6-0).

C. Ordinance: Offenses and Miscellaneous Provisions Ordinance Text Amendments

Consideration and approval of an Ordinance to amend Chapter 30, referred to as Offenses and Miscellaneous Provisions, of the Code of the City of Alpharetta to amend provisions regarding the discharge of firearms; to amend provisions regarding urban camping and the improper use of property; to regulate the discharge of bows and crossbows; to prohibit interference of a city officer; to prohibit false representations to a city officer; to prohibit loitering and prowling; to prohibit trespass; to prohibit street racing and reckless driving exhibitions; to prohibit vandalism; to prohibit aggressive panhandling; to prohibit public drunkenness; to provide for traffic violations for disobeying or avoiding an official traffic control device; to prohibit public urination or defecation; to prohibit creating a disturbance at schools; to provide for enforcement; to provide for penalties for violations; to repeal conflicting ordinances; and for other purposes.

- City Attorney, Molly Esswein read the Ordinance title aloud and presented this item.

- The City Council reviewed and discussed as a Work Session item, proposed text amendments to Chapter 30, Offenses and Miscellaneous Provisions, of the Code of the City of Alpharetta at the Special Called City Council meeting on March 23, 2026.
- The intent of the proposed amendments and new ordinances is to provide more control to the local police in terms of discouraging undesirable behaviors without necessarily giving someone a permanent criminal record. The new and amended ordinances will allow the City Police to maintain local control to address these behaviors at the municipal level by providing authority to issue citations for ordinance violations.
- The changes to the code from the Work Session on March 23, 2026, were largely limited to the provisions related to giving false information to and/or interfering with city officers to add fire personnel. The other change was to eliminate the permitting requirement to shoot a bow or crossbow in the city.
- Revisions:
    - Sec. 30-5 Firearms
    - Sec. 30-7 Urban Camping and Improper Use of Property
    - Sec. 30-85 Loitering for the Purpose of Engaging in the Solicitation of Sex Acts
- New:
    - Sec. 30-9 Discharge of Bows or Crossbows
    - Sec. 30-10 Interference of a City Officer
    - Sec. 30-11 False Representations to City Officers
    - Sec. 30-12 Loitering or Prowling
    - Sec. 30-13 Petty Trespass
    - Sec. 30-14 Street Racing and Reckless Driving Exhibitions
    - Sec. 30-15 Vandalism
    - Sec. 30-16 Aggressive Panhandling
    - Sec. 30-17 Public Drunkenness
    - Sec. 30-18 Avoiding a Traffic Sign, Signal, or Light

- Sec. 30-19 Public Urination or Defecation
- Sec. 30-20 Creating a Disturbance at Schools
- Sec. 30-86 Loitering for the Purpose of Engaging in Drug-Related Activity

CITY COUNCIL DISCUSSION:

- Council Member DeRito asked the City Attorney what the enforcement mechanism for the bow/crossbow section is.
- Council Member Brady asked the City Attorney about the consequences if a child were to discharge a bow/crossbow and what measures would be taken.
- Mayor Gilvin asked Chief Lindgren about the decision to remove the permitting process in the bow/crossbow section and if the ordinance is enforceable without a permitting process.
- Council Member DeRito asked Chief Lindgren about the decision to remove the permitting process in the bow/crossbow section.

PUBLIC COMMENTS:

- There were no public comments.

❖ Council Member Reeves offered a motion to adopt an Ordinance to Amend Chapter 30 of the Code of the City of Alpharetta, Offenses and Miscellaneous Provisions; To Provide for Effective Dates; And for Other Purposes.

- Council Member DeRito seconded the motion.
- The motion was approved unanimously (6-0).

D. **The following items have been deferred or withdrawn and will not be considered during this meeting:**

1. **Z-25-07/CU-25-15/V-25-20 Alpharetta District Places**

   WITHDRAWN: This request has been withdrawn by the Applicant and will no longer be considered.

   Consideration of a rezoning, conditional use, and variances to allow for the construction of 165 'Dwelling, 'For-Rent' units and approximately 35,000 square feet of retail/restaurant on 3.02 acres in the Downtown. A rezoning is requested

from C-2 (General Commercial) to DT-C (Downtown Core) and a conditional use is requested to allow 'Dwelling, 'For-Rent'. Variances are requested to Unified Development Code (UDC) Subsection 1.4.2 and Subsection 3.2.2 to allow utilities in a required landscape strip, Subsection 3.2.8(D) to reduce the landscape strip along Marietta Street, Subsection 3.2.8(K) to remove trees within the building setback along Marietta Street, Appendix A Subsection 2.3.3(E) to modify the Collector Street Commercial/Mixed-Use streetscape requirements for Marietta Street, and Appendix A Subsection 3.5.5 to increase the maximum building footprint. The property is located at 0 South Main Street and 131 South Main Street and is legally described as being located in Land Lot 695, 1st District, 2nd Section, Fulton County, Georgia.

2. CU-26-03/V-26-04 7Brew Coffee/11378 State Bridge Road

DEFERRED: This request has been deferred by Applicant to the June 1, 2026 City Council meeting and will not be considered at this meeting.

Consideration of a conditional use and variance to allow a 'Restaurant w/Drive-Thru Window' for 7Brew Coffee. A conditional use is requested to allow 'Restaurant w/Drive-Thru Window' in the C-1 (Neighborhood Commercial) zoning district and a variance is requested to Unified Development Code Subsection 2.2.14(D) to reduce the front building setback. The property is located at 11378 State Bridge Road and is legally described as being located in Land Lot 129, 1st District, 1st Section, Fulton County, Georgia.

8. NEW BUSINESS

A. 2026-2027 City Wide Employee Health and Related Benefits

Consideration and approval to award contracts for certain Employee Health and Related Benefits for Plan Year 2026-2027: City's group Medical and Dental coverage to Cigna; Vision coverage to Eye Med; Life and Disability coverages to New York Life; and Wellness Services to Engagement Health Group; and to authorize the Mayor to execute all necessary documents.

- Director of Finance, Tom Harris, came forward to present this item.

- For certain Employee Health and Related Benefits for Plan year 2026-2027, staff recommends that contracts be awarded as follows: The City's group Medical and Dental coverage to Cigna; Vision coverage to Eye Med; Life and Disability coverage to New York Life; and Wellness Services to Engagement Health Group.
- The City's Broker of record, Alliant Insurance Services (8th largest global brokerage firm), solicited proposals from the market (Anthem, UHC, Aetna) for our medical and other related coverage. After months of negotiations, and with some reasonable plan changes, our current carrier, Cigna, is the recommended provider for both Medical (8.5% increase - $800k) and Dental (2% increase - $9.9k) for plan year 2026-2027. Cigna will provide a $25k optional service fund and a $5k wellness fund.
- This is an expected and a very reasonable renewal given that the current year's medical claims loss ratio is at 127% (total loss ratio of 111%), meaning medical claims paid by Cigna are exceeding medical premiums paid to Cigna by 27% (11% in excess of total premiums - medical and admin) and, based on projected a national medical trend increase of 7%, an increase in the range of 20% or more could be expected. The closest competing carrier provided a renewal proposal with an increase of 29%. Cigna's final proposal is indicative of their commitment to continue to serve the City of Alpharetta. With this increase, it should be noted that the City's 6-year average increase has been 4.0% compared to the trend of 7% for the same period.
- In an effort to achieve annual savings with minimal impact to employees' coverage benefit, staff recommended the following changes to be included in the above renewal ($200k in annual savings).
- Only offer 1 plan design under an HSA (Health Savings Account) and thus close the more expensive HRA (Health Reimbursement) plan ($100k in savings / 20 employees);
- Move from standard formulary for prescriptions to value formulary ($100k in savings / approx. 143 users out of 1000 total plan users are affected / however, 133 of these are a result of other suitable over-the-counter drugs available for conditions of allergy, heartburn or nasal congestion). The change to value formulary replaces 20 types of drugs to equally effective non-prescription/generic. No other changes.
- Our medical coverage with Cigna is a Fully Insured Plan designed as a Minium Premium/Shared Return Plan. With the plan, if medical claims come in under the

premiums set by Cigna, the City saves. If claims exceed the premiums, Cigna cuts the City a check for the difference. No other carrier offers this savings potential under a fully insured plan.

- Eye-Med is the recommended carrier for vision care. They proposed a 0% increase.
- NY Life proposed a 0% increase in their Basic Life/AD&D as well as 0% in their policies for Long Term and Short Term Disability coverage.
- Engagement Health Group provides wellness services to city employees. The cost for this service will remain flat at $73,025.
- The total increase over the prior year for all services/premiums for our Employee Health and Related Benefits for Plan Year 2025-2026 is approximately 7.0%.
- The premium increases, in terms of dollars, will be shared using the same percentages currently allocated to the employee (approx. 10%) and employer (approx. 90%) as the current year. Thus, the premium increases, in terms of percentage growth, for both the employee and employer will be approximately 8.0%, depending on coverages chosen by the employee.
- See attached 2026-2027 Renewal Executive Summary for the coverages and related premiums and costs.

CITY COUNCIL DISCUSSION:

- Council Member DeRito asked staff about total cost to the City after the netted savings of eliminating the HRA plan and changing the prescription formulary, and the impact to the typical employee.
- Council Member Hipes asked staff about amending the staff report that the cost is coming out of the Fiscal Year Operating Budget, not Unallocated.
- Council Member Brady commented that the original increase was 17%, and thanked the City Administrator and Finance Director for their hard work to reduce that.

PUBLIC COMMENTS:

- There were no public comments.

❖ Council Member Brady offered a motion to approve the agreement for certain Employee Health and Related Benefits for Plan Year 2026-2027: City's group Medical and Dental

coverage to Cigna; Vision coverage to Eye Med; Life and Disability coverages to New York Life; and Wellness Services to Engagement Health Group, and with authorization for the Mayor to execute all necessary documents.

- Council Member DeRito seconded the motion.
- The motion was approved unanimously (6-0).

B. GDOT Local Road Assistance (LRA) Administration Grant Application

Consideration and approval of a resolution to authorize the submission of a Fiscal Year 2026 Local Road Assistance Grant Application to the Georgia Department of Transportation and with authorization for the Mayor to execute the submittal cover letter and all necessary documents.

- City Administrator, Chris Lagerbloom, came forward to present this item.
- The Governor and the state Legislature included Local Road Assistance Administration funds (LRA) in the amended fiscal year 2026 budget. The LRA funds will be administered through the Georgia Department of Transportation (GDOT) and distributed utilizing the current Local Maintenance and Improvement Grant (LMIG) application system. All eligible activities / projects for LRA funds will be the same as the LMIG program. LRA funds will require no match.
- GDOT began accepting applications on March 23, 2026, and all electronic applications must be received no later than June 15, 2026. For an application to be processed, the following requirements must be met:

    1. A local government must be in audit compliance with the Department of Audits and Accounts (DOAA). A local government must also be in compliance with the Department of Community Affairs (DCA) minimum standards under the Georgia Planning Act, related to immigration and the Service Delivery Strategy law. (A non-compliant local government may start a draft application and then submit it once the local government is compliant.)
    2. A signed cover letter must be attached that includes the completion status of the last three fiscal years' LMIG Grants. (This has been completed by the Public Works Department)

3. A signature page must include both the local government seal and the notary seal. The application website provides a blank signature page for you to download, complete and upload as an attachment.

- The City of Alpharetta is slated to receive funding from this grant in the amount of $838,403.13. The funding will go towards FY 27 Milling and Resurfacing of paved City roadways.

PUBLIC COMMENTS:

- There were no public comments.

❖ Council Member Reeves offered a motion to approve the resolution to authorize the submission of a Fiscal Year 2026 Local Road Assistance Grant Application to the Georgia Department of Transportation, and with authorization for the Mayor to execute all necessary documents.

- Council Member Brady seconded the motion.
- The motion was approved unanimously (6-0).

C. Request for Proposal 26-112: Firefighter Turnout Gear

Consideration and approval of the award of a contract for RFP 26-112 to MES Service Company, LLC for firefighter turnout gear and with authorization for the Mayor to execute all necessary documents.

- The Fire Department annually purchases Structural Turnout Gear and Pull-on boots for our Firefighter personnel as either an initial issue or as a replacement for out-of-service gear. With this RFP, the City intends to award a 1-year non-exclusive contract to the vendor(s) that best meet the requirements listed in the RFP.
- The Fire Department and Finance worked together to prepare a Request for Proposal (RFP 26-112) and advertised for proposals on January 29, 2026, with responses due on February 26, 2026. The City only received two (2) proposals from:
    - MES Service Company, LLC
    - Bennett Fire Products Co., Inc
- Turnout gear is a highly specialized form of equipment with limited suppliers. The MES Service Company, LLC proposal meets all Fire Department turnout gear specification

requirements. The Evaluation Committee evaluated the proposals based on turnout gear: jacket, pants and boots.

- The resulting score for the MES Service Company, LLC proposal was 90.83 for the jacket & pants and 90.83 points for boots.
- The turnout gear replacement schedule is nonstandard and should be determined by the gear's age, frequency of use, and condition after use. The National Fire Protection Association recommends a 10-year service life for turnout gear. Based on this life expectancy, the department anticipates replacing approximately 10 sets of gear and purchasing 10 sets for new recruits in fiscal years 2026 and 2027. Funding for replacement and initial-issue gear (e.g., new hires) is provided through the General Fund.
- The Fire Department desires to enter into a one-year contract with MES Service Company, LLC.

CITY COUNCIL DISCUSSION:

- Council Member Brady asked staff if this cost is part of the Operating Budget for the year.

PUBLIC COMMENTS:

- There were no public comments.

❖ Council Member Hipes offered a motion to approve the award of RFP 26-112 to MES Service Company, LLC , a one-year contract for firefighter turnout gear in an amount not to exceed $100,000, and with authorization for the Mayor to execute all necessary documents.

- Council Member Driskell seconded the motion.
- The motion was approved unanimously (6-0).

D. Request for Proposal 26-113: Design/Build: Wills Park Field Artificial Turf Conversion

Consideration and approval of the award of RFP 26-113, Design/Build: Wills Park Field Artificial Turf Conversion, to Sprinturf, LLC in the amount of $546,286.00 for Wills Park artificial turf conversion, and with authorization for the Mayor to execute all necessary documents.

- Director of Recreation, Parks, & Cultural Services, Morgan Rodgers, came forward to present this item.
- Wills Park Field 5 is currently a natural grass field that has experienced persistent drainage issues for several years. As a result, scheduled games and practices are frequently canceled due to poor field conditions. The Alpharetta Youth Baseball Association (AYBA), which has relied on this field for many years, has expressed ongoing concerns about its limited usability. AYBA has agreed to partner with the City to address these issues through the conversion of the field to artificial turf along with necessary drainage improvements and has committed to funding 50 percent of the total project cost.
- The City is seeking a qualified and experienced contractor to design and construct a synthetic turf field at Wills Park Baseball Field 5. The existing sod field has poor drainage and frequently necessitates cancellation of activities following rain. The City desires to replace the existing sod field with a new synthetic turf field. According to Georgia Public Works Law, public works construction means the building, altering, repairing, improving, or demolishing of any public structure or building or other public improvements of any kind to any public real property other than road construction or the routine operation, repair, or maintenance of existing structures, buildings or real property. A. Permits anticipated for this project: I. The Design-Build Contractor is responsible for the preparation of all required documents, plans, and forms for compliance with Georgia's NPDES permit. II. The Design-Build Contractor is responsible for all required NPDES testing as set forth in the State of Georgia DNR-EPD Permit No. GAR100001. III. The Design-Build Contractor is responsible for the Erosion and Sediment Control permit from the City of Alpharetta. B. There are no anticipated rights of way and/ or easements required for this project. The work is within City-owned property and right of way. C. The Cost Proposal form will be used as the primary representation of each Design-Build Contractor’s cost/ price. Evaluation of cost proposals will follow review process and evaluation criteria noted in this RFP. Award will be based on the best value to the City. Georgia Procurement Registry Event ID: PE-66085-NONST-2026-000000081 (RFP 26-113, Design / Build: Wills Park Field Artificial Turf Conversion).

- The Department of Recreation, Parks and Cultural Services, with guidance from the Finance Department, prepared RFP 26-113 which was issued on January 22, 2026. RFP 26-113 was advertised through the City's e-procurement site (Bonfire) as well as the Georgia Procurement Registry and resulted in 2,350 vendor invites and 54 document takers. RFP 26-113 responses were received on February 24, 2026, and included proposals from 2 firms.
- An Evaluation Committee from members of the Recreation, Parks and Cultural Services Department evaluated the proposals based on the following criteria (max of 100 points):
    - Phase 1 Evaluation Criteria
        - Project Team, Resumes, Statement of Qualifications, References and Comparable Projects (25 points)
        - Technical Proposal, Project Approach, Product Information (25 points)
        - Cost (50 points)
        - Evaluation Committee members independently evaluated and scored each proposal for all criteria above, excluding cost. Upon completion of the independent evaluations, cost was added to the overall scoring resulting in the following rankings:
- Total Project costs are $564,286.00 and include funding for the Base Scope (design/build of turf field conversion).
- The Evaluation Committee recommends the award of RFP 26-113 to Sprinturf, LLC as the high-scoring proposal and believes their proposal best meets the criteria intent in overall design approach, materials, necessary durability, and cost competitiveness. In addition, Sprinturf, LLC has been contracted by the City for five previous turf replacement projects since 2017. The level of service and products delivered on those projects has consistently exceeded expectations and the artificial turf fields have proven to be durable and well received by our customers.

CITY COUNCIL DISCUSSION:

- Council Member Driskell asked staff if this item is for the entire field or just the outfield.

PUBLIC COMMENTS:

- There were no public comments.

❖ Council Member Hipes offered a motion to approve the award of RFP 26-113 to Sprinturf, LLC for the design/build conversion of Wills Park Baseball Field 5 to an artificial turf field in an amount totaling $546,286.00, accept the funding and associated payment terms from the Alpharetta Youth Baseball Association in an amount totaling $282,143.00, and with authorization for the Mayor to execute all necessary documents.

- Council Member Brady seconded the motion.
- The motion was approved unanimously (6-0).

E. Agreement: ICON Venue Group LLC d/b/a CAA ICON – Second Amendment Services

Consideration and approval of a Second Amendment for additional services to the January 13, 2023 Agreement, and with authorization for the Mayor to Execute all necessary documents.

- City Administrator, Chris Lagerbloom, came forward to present this item.
- The City of Alpharetta entered into an agreement with ICON Venue Group, LLC d/b/a CAA ICON dated January 17, 2023. Presented here is the Second Amendment delivered by CAA Icon setting the expectations of the parties going forward. The additional offering is defined as general advisory services and are more completely defined in the attached document labeled Phase 1.
- If the Second Amendment is approved, the professional monthly fee of $25,000 for a minimum of four months, plus reimbursable expenses will be encumbered.
- To give some idea of the topics that will be studied, general advisory services can be defined, but not limited to:
- General advisory assistance and negotiation support services
  - Establish weekly call/meeting cadence
  - Participate in key City briefings/meetings/presentations
  - Meet with Client's representative(s)
  - Assist in developing overall negotiation strategy

- Prepare a comprehensive review and evaluation of comparable NHL deal structures and leases
- Identify and consider alternative financing structures/options
- Identify key considerations and issues list
- Develop public relations strategy
- Assess key stakeholder goals/objectives and alternatives
- Participate in negotiations
- Consider team alternatives.

CITY COUNCIL DISCUSSION:

- Council Member Hipes asked staff if the monthly cost includes fees and expenses, or if expenses are separate.
- Council Member Reeves asked staff if the cost is captured in the FY 2027 budget.
- Council Member DeRito asked about the City Council's involvement in these discussions and negotiations.
- Council Member Mayor Gilvin responded that the City is not currently negotiating with anyone and this contract is akin to retaining an attorney and is to ensure the City has input from experienced professionals when the time comes.
- Council Member Reeves shared that she would like to be more informed.
- Council Member DeRito shared the same sentiment.
- City Administrator, Chris Lagerbloom, responded that because there is now a rezoning application, the Council should continue to remain relatively uninvolved and neutral until such a time as the rezoning application is decided.
- Council Member Driskell asked staff if the monthly cost is "use it or lose it."

PUBLIC COMMENTS:

- There were no public comments.

- ❖ Council Member Hipes offered a motion to approve a Second Amendment Services Agreement with ICON Venue Group, LLC d/b/a CAA ICON in an amount not to exceed $100,000, and with authorization for the Mayor to execute all necessary documents.
  - o Council Member DeRito seconded the motion.
  - o The motion was approved unanimously (6-0).

F. Resolution: Participation in Amicus Brief in Chang v. City of Milton

Consideration and approval of a Resolution authorizing the City of Alpharetta to participate in an Amicus Brief in Chang v. City of Milton on remand before the Georgia Court of Appeals or, if warranted, the Georgia Supreme Court, and with authorization for the Mayor to execute all necessary documents.

- City Attorney, Molly Esswein, read the Resolution title aloud and presented.
- The City Attorney's Office has requested the City's permission to file an amicus brief (friend of the court legal brief) on the City's behalf in the pending matter before the Georgia Court of Appeals, or if warranted, the Georgia Supreme Court, referred to as Chang v. City of Milton.
- The case involves a claim of liability against the City of Milton for personal injuries due to a 2016 vehicle collision with a fixed obstruction (a masonry planter) located on City-owned right of way where the obstruction was outside the motoring lanes of travel.
- If adopted, this resolution would allow the City Attorney's Office to file an amicus brief, which may include the City's name as a participating party.

CITY COUNCIL DISCUSSION:

- Council Member Hipes asked City Attorney, Molly Esswein, about the extent of the brief.

PUBLIC COMMENTS:

- There were no public comments.

- ❖ Council Member Hipes offered a motion to approve a Resolution authorizing the City of Alpharetta to participate in an Amicus Brief in the Chang v. City of Milton appeal pending in the Georgia Court of Appeals or, if warranted, the Georgia Supreme Court, and with authorization for the Mayor to execute all necessary documents.
  - o Council Member Brady seconded the motion.

- The motion was approved unanimously (6-0).

9. **PUBLIC COMMENT**

- There were no public comments.

10. **REPORTS**

- Council Member Reeves spoke about the City Police open house that occurred on April 25th.
- Council Member Hipes spoke about the upcoming Taste of Alpharetta on May 14th.
- Council Member Reeves spoke about her upcoming community meeting on the TSPLOST III project list.

11. **EXECUTIVE SESSION (IF NECESSARY)**

- There was not an executive session.

12. **ADJOURNMENT**

❖ Council Member Driskell offered a motion to adjourn the meeting.

- Council Member Brady seconded the motion.
- The motion was approved unanimously (6-0).

- With there being no further items to consider or discuss, Mayor Gilvin adjourned the meeting at 8:42 p.m.

Respectfully submitted,

Grace Orehosky

Grace Orehosky, Acting City Clerk

STAFF REPORT

Department: City Clerk
Submitted By:
Meeting Date: May 4, 2026

AGENDA ITEM:

Announcement of Public Hearing Procedures

STAFF RECOMMENDATION:

BUDGET & PROCUREMENT:

BUDGETED ITEM: NO

FISCAL IMPACT: NO

INCLUDED IN CURRENT FY CPTL BUDGET: NO

INCLUDED IN CURRENT FY OPRT. BUDGET: NO

TOTAL PROJECT COST:

APPROPRIATIONS:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

EXTERNAL FUNDING SOURCES:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

ITEM DESCRIPTION:

ALTERNATIVES:

ATTACHMENTS:

CITY COUNCIL STAFF REPORT

Department: Community Development
Submitted By: Kathi Cook
Prepared By: Michael Woodman
Meeting Date: May 4, 2026

AGENDA ITEM: MP-26-03/CLUP-26-01/Z-26-01/CU-26-05/V-26-02 TPG BROOKSIDE WEST

The applicant, Portman Holdings, is requesting a master plan amendment, comprehensive land use plan amendment, rezoning, conditional use, and variance to allow for the redevelopment of a five (5) story, 130,000 square foot office building with 104 'For-Sale' townhomes on approximately 8.76 acres in the Brookside Master Plan. A master plan amendment is requested to allow the proposed residential development and add the property to the Portman Brookside mixed-use development. A comprehensive land use plan amendment is requested from 'Corporate Office' to 'Mixed Use' and a rezoning is requested from O-I (Office-Institutional) to MU (Mixed Use). A conditional use is requested to allow 'Dwelling, 'For-Sale', Attached' use and variances are requested to reduce the minimum office percentage and reduce buffers. The property is located at 3650 Brookside Parkway near the southeast corner of Old Milton Parkway and Brookside Parkway.

This item was considered at the April 23, 2026 Planning Commission meeting. There were no public comments. After discussion, the Commission recommended approval subject to the staff recommended conditions and accepting a change from the applicant. Vote 7-0.

STAFF RECOMMENDATION:

Approve MP-26-03/CLUP-26-01/Z-26-01/CU-26-05/V-26-02 TPG Brookside West, subject to the following conditions:

1. The 8.76-acre property shall be zoned MU and incorporated into the Portman Brookside mixed-use development. The site shall be developed substantially similar to the site plan prepared by Kimley-Horn, dated 4/1/26, except for modifications required to comply with the conditions below. However, lot yield depicted is not guaranteed and subject to meeting all City code requirements and conditions of zoning.
2. The comprehensive land use designation of the property shall be Mixed Use.
3. 'Dwelling, 'For-Sale', Attached' shall be added as a permitted use on the subject property. The property shall be limited to no more than 104 'Dwelling, 'For-Sale', Attached' units with a maximum building height of 3 stories. Residential entitlement shall be deducted from the Brookside Master Plan Pod A non-residential maximum density at a 1:1 exchange rate.
4. Portman Brookside mixed-use development shall be permitted with an office-institutional percentage of 17.4%.
5. Architecture shall be substantially similar to the submitted renderings. Except that front entries along Brookside Parkway shall be recessed with pronounced covered porches, subject to final approval by Staff. Unpainted brick shall be the primary exterior material on all building elevations. Buildings shall include 4-sided architecture and materials. Where the side of a building faces Brookside Parkway, side elevation shall include a front entrance or have the appearance of a front entrance, as depicted in the submitted example elevation, with final approval by Staff.
6. No more than 46 townhome units shall have a minimum unit width of 18'.
7. Townhome buildings fronting on Brookside Parkway shall have a sidewalk connection to the sidewalk along Brookside Parkway, as approved by Staff.
8. Fencing along Brookside Parkway shall be decorative black metal with a maximum height of 4' and shall include brick columns with gates to provide access to the Brookside Parkway sidewalk, as approved by Staff.
9. Building setback shall be a minimum 20' along Brookside Parkway.
10. Minimum 10' landscape strip shall be provided along local streets (not including alleys). Unit stoops and lead walks shall be permitted to encroach into the landscape strip but may not displace required landscaping. Sidewalks shall not overlap the required landscape strip, except that an alternate landscape plan in compliance with the UDC minimum landscape material requirements may be approved by the Director.
11. Minimum 15' planted buffer shall be provided along the north and east property lines. Developer shall remove existing asphalt parking lot on the adjacent property to the east and shall plant the area has a buffer, as approved by Staff and the adjacent property owner.

12. Developer shall provide a line-of-sight study to place landscaping to screen garage doors from Brookside Parkway, as approved by Staff.
13. Open space shall be developed substantially as depicted on the site plan prepared by Kimley-Horn, dated 4/1/26, or as approved by Staff.
14. The proposed development may be gated as depicted on the site plan prepared by Kimley Horn, dated 4/1/26, as approved by Staff.
15. Developer shall close the existing driveway curb cut on Brookside Parkway along the western property boundary and shall replace the existing driveway curb cut with new curb lines, sidewalk, and tree plantings, as approved by Staff.
16. Developer shall improve line of sight distances to the max. extent possible on either side of the development entrance without obstructing vertical and horizontal sight distance requirements, as approved by Staff.
17. Developer shall improve internal streets and alleys substantially as depicted on the site plan prepared by Kimley-Horn, dated 4/1/26. Streets and alleys shall include mountable header curb and decorative pedestrian lighting, with final design approved by Staff. New internal streets and alleys shall be private and maintained by the HOA.
18. Alleys terminating adjacent to Brookside Parkway shall be heavily screened with decorative landscape material and/or a decorative structure (wall, trellis, arbor, etc.), as approved by Staff.
19. Sidewalk connections between internal street and Brookside Parkway sidewalk shall be provided between Units 99 & 100, and Units 58 & 59.
20. Site plan shall accommodate the Brookside Parkway Road-Diet project Concept B, dated January 2026, which includes a minimum 6' planter, minimum 8' sidewalk, and pedestrian lighting along the property's frontage on Brookside Parkway, as approved by Staff.
21. Pedestrian crosswalk depicted across Brookside Parkway shall require further coordination with Staff as part of the LDP process.
22. Developer may identify a trail construction, enhancement project in the Brookside Small Area Plan and implement the project in exchange for impact fee credits, as approved by Staff.
23. Developer shall save existing oak trees along Brookside Parkway as depicted on the tree plan prepared by Kimley-Horn, dated 2/9/26, with final approval by Staff. To accommodate minimum sight distance requirements at the development entrance and the Brookside Parkway Road-Diet project, some of the existing oak trees may require removal, as approved by Staff.
24. Crape myrtles meeting specimen criteria shall not have recompense associated with their removal.
25. Retaining walls shall receive architectural façade treatment and/or be heavily landscaped, as approved by Staff. Retaining walls visible from developed areas exceeding 16' in height shall be terraced with landscaped areas between terraces.
26. Developer shall provide an original sculpture, minimum 12' in height, at the project entrance or another location as approved by Staff, with final approval by the City's Cultural Arts Commission.
27. No unfinished wood decks or fencing shall be visible from Brookside Parkway.
28. No more than 10% of the townhome units shall be rented as stated in the HOA covenants.

ITEM DESCRIPTION:

The submitted request, if approved, would allow for the redevelopment of a five (5) story, 130,000 square foot office building with 104 'For-Sale' townhomes on approximately 8.76 acres in the Brookside Master Plan. The proposed residential density in Pod A is 6.13 dwelling units per acre, which includes the 410 residential units approved on the adjacent property to the west (Portman Brookside – 3625 Brookside Parkway). A master plan amendment is requested to allow the proposed residential development and add the property to the Portman Brookside mixed-use development. A comprehensive land use plan amendment is requested from 'Corporate Office' to 'Mixed Use' and a rezoning is requested from O-I (Office-Institutional) to MU (Mixed Use). A conditional use is requested to allow 'Dwelling, 'For-Sale', Attached' use and variances are requested to reduce the minimum office percentage and reduce buffers. The property is located at 3650 Brookside Parkway near the southeast corner of Old Milton Parkway and Brookside Parkway.

The property is zoned O-I subject to the Brookside Master Plan Pod A and was developed in 1999 with a five (5) story, 130,000 square foot office building and surface parking lot. Surrounding properties are zoned MU (Mixed Use) and O-I to the west, O-I to the south and east, and C-2 (General Commercial) to the north. The Mansions at

Alpharetta is located to the east, the Portman Brookside mixed-use development is approved on the property to the west, Georgia State University is located to the south, and commercial outparcels are located to the north. The property has a comprehensive land use plan designation of 'Corporate Office', which requires an amendment to allow the applicant's proposal.

Brookside Master Plan was approved in 1997 as an office park with retail nodes along Old Milton Parkway. Pod A, which has a total area of 83.8 acres, was approved with a non-residential density of 20,000 square feet per acre, or 1,676,000 square feet, and maximum building height of eight (8) stories. Approximately 877,861 square feet, or 46%, of the non-residential entitlement remains unused in Pod A of the Master Plan. The applicant requests a master plan amendment to allow the proposed residential development and assign development regulations. The table below compares the applicant's proposal to the current entitlement in Brookside Master Plan Pod A.

Comparison of TPG Brookside West to the Brookside Master Plan Pod A Entitlement

Use	Applicant's Proposal	Brookside Pod A
Residential	104 'For-Sale' Townhomes*	335 'For-Rent' Units* 75 'For-Sale' Townhomes*
Residential Density	6.13 dus/acre (11.9 dus/acre on the 8.76-acre property)	4.89 dus/acre
Office	Remove 130,000 SF Office Bldg.	1,616,000 SF (738,139 SF existing)
Commercial	N/A	60,000 SF

*Residential entitlement will be deducted from the Brookside Master Plan Pod A non-residential maximum density at a 1:1 exchange rate.

The Horizon 2040 Comprehensive Plan identifies Old Milton Parkway east of Georgia 400 as a priority area in need of redevelopment and promotes retrofitting, repurposing, and mixed-use patterns to create activity nodes near or within existing suburban office parks. In response, the Brookside Small Area Plan was created and adopted in 2022. While the Plan does not include land use recommendations, its vision re-imagines the area as a walkable, connected environment in an effort to re-position the suburban office park which has one of the highest office vacancies in the City. Several capital improvement projects are recommended to achieve the Plan's vision, including the Brookside Parkway Road-Diet. The road-diet project envisions Brookside Parkway going from four (4) lanes to two (2) lanes with a planted median, twelve-foot (12') multi-use trail, and eight-foot (8') sidewalk. The Brookside Parkway road-diet is supported by a traffic study which contemplates existing and future development in Brookside.

As shown in the table below, the applicant requests variances to the Unified Development Code (UDC) related to the MU district development regulations and buffer requirements. The Portman Brookside mixed-use development includes 25.2%, or 4.95 acres, of office-institutional uses. With the addition of the 8.76-acre property to the mixed-use development, the office-institutional percentage is reduced to 17.4%. There is an additional 42.78 acres of office-institutional uses developed in Pod A of the Brookside Master Plan.

Applicant's Variance Requests

Code Reference	Applicant's Request
UDC Subsection 2.2.20(B) MU, Permitted Principal Uses	Reduce the minimum percentage of office use from 25% to 17.4%.
UDC Subsections 3.2.8(B)(1)(a) Tree Replanting, Buffer, and Landscape Standards, Buffer Requirements	Reduce and modify the 50' undisturbed buffer to a 15' planted buffer along the north and east property lines.

SITE PLAN

The submitted site plan depicts the existing 130,000 square foot office building and 597-space surface parking lot to be redeveloped with 104 'For-Sale' townhome units in eighteen (18), three (3) story buildings. Townhome buildings consist of a mix of unit types, including 42 – eighteen-foot (18') units, 26 – twenty-foot (20') units, and

36 – 22’ wide units. All townhomes are depicted to be rear entry with access from an alley. Access to the site will continue from an existing shared driveway on Brookside Parkway located in the southeast corner of the property, which is depicted to be gated. The existing curb cut on the west side of the property is depicted to be removed due to site visibility issues. A twenty-foot (20’) building setback and ten-foot (10’) landscape strip is depicted along Brookside Parkway. A fifteen-foot (15’) building setback and planted buffer is depicted along the east and north property lines.

The new internal street network consists of two (2) private streets and several private alleys. Streets are depicted to include on-street parking, planters, and five-foot (5’) sidewalks. Sidewalk connections to the sidewalk along Brookside Parkway are depicted at three (3) locations. The Brookside Small Area Plan recommends streetscape improvements along Brookside Parkway. The City’s preferred streetscape requires a minimum six-foot (6’) planter and minimum eight-foot (8’) sidewalk along the property’s frontage on Brookside Parkway. Five-foot (5’) sidewalks are depicted throughout the development.

Unified Development Code (UDC) parking regulations require one (1) parking space for each bedroom in a townhome unit, as well as a minimum eighteen-foot (18’) long driveway. Assuming townhome units are all three (3) bedrooms, a total of 312 parking spaces would be required. Each unit will have two (2) side-by-side parking spaces in a garage and two (2) spaces on a code-compliant driveway for a total of 416 parking spaces. There are an additional 24 on-street, guest parking spaces depicted throughout the development.

The site plan calls out 2.88 acres of open space within the proposed development. The MU district requires a minimum ten percent (10%) civic space, as well as one (1) acre of open space per 100 population generated by residential uses. The 2020 U.S. Census data reflects 2.52 persons per household for the City, of which the proposed development would generate a population of approximately 262 residents. Therefore, 2.62 acres of open space and 0.876 acres of civic space (3.496 acres of open space) are required for the development. The Portman Brookside mixed-use development includes 13.72 acres of open space, of which 12.29 acres is required. Therefore, the addition of the proposed development to the Portman brookside mixed-use development would increase the overall open space requirement to 15.81 acres, of which 16.63 acres is provided. The site plan depicts three (3) pocket parks and a community center with a pocket park, community pool, and mail kiosk located at the center of the development and pocket parks located at the north and south ends of the development. Additional open space is depicted throughout the development, consisting of patios and porches, yards and lawns, and sidewalks (not required by Code).

The applicant has stated that most street trees along Brookside Parkway will be saved. Some trees will be removed in conjunction with ensuring appropriate sight distance at the development entrance and the Brookside Parkway Road-Diet project. The remaining trees on the site are primarily parking lot landscape trees, of which none are identified to be saved. The property is served by a master detention pond which provides stormwater management for properties in the Brookside Master Plan.

RENDERINGS

The applicant submitted renderings and a side elevation of the three (3) story townhomes. Exterior materials consist of a mix of brick and siding with decorative metal roof accents. Townhome buildings are depicted with balconies, porches, and covered walkouts. It is recommended that brick be unpainted and that the walkouts be more pronounced with recessed entries. Side elevations of buildings facing Brookside Parkway should be consistent with the submitted side elevation depicting a similar level of detailing as the front elevations, as well as a side entry and Juliet balcony. Dormers and gables are utilized to break up the roofline, and a heavy cornice is depicted crowning the top of the building.

TRAFFIC

The applicant submitted a trip generation report, which estimates that the 104 townhomes will generate 46 AM Peak Hour trips and 51 PM Peak Hour trips. As shown in the table below, Staff estimates that the redevelopment of the property with the proposed townhome development would represent an 82% decrease in AM Peak Hour trips and 79% decrease in PM Peak Hour trips as compared to the existing office development on the property.

Land Use	Code	Density (SF/DU)	Period	TOTAL	IN	OUT
Existing Use: General Office Building	710	130,000 SF	Daily	1011	506	505
			AM Peak Hour	257	227	30
			PM Peak Hour	241	39	202
Proposed Use: Single-Family Attached Housing	215	104 DU	Daily	682	341	341
			AM Peak Hour	46	12	34
			PM Peak Hour	51	29	22
Total Net New Trip Reductions (Proposed Use Trips - Existing Use Trips)			**Daily**	***-329***	***-165***	***-164***
			AM Peak Hour	***-211***	***-215***	***4***
			PM Peak Hour	***-190***	***-10***	***-180***

Based upon methodologies from ITE's Trip Generation, 12th Edition (2025)

SCHOOLS

Residential development is known to increase school enrollment. Fulton County Schools calculated the potential number of children who may live on the property by using their standard calculation to distinguish the number of children that a residential development will generate. The following table outlines these figures:

FULTON COUNTY SCHOOLS – 104 'For-Sale' Townhome Units

School	Estimated # New FCS Students Generated
New Prospect Elementary School	3 – 24
Webb Bridge Middle School	0 – 9
Alpharetta High School	3 – 18
Total	6 – 51

Based on the total figure for all school levels, it can be assumed that the proposed development could house approximately 6 – 51 school age children. New Prospect Elementary School and Alpharetta High School have available enrollment capacity; however, Webb Bridge Middle School is over capacity.

STANDARDS FOR COMPREHENSIVE LAND USE PLAN AMENDMENTS

Unified Development Code Section 4.1.3 Standards for CLUP amendment approval, provides the following criteria for consideration when evaluating a request for a change in land use:

A. The extent to which a change in the economy, land use or development opportunities of the area has occurred.

Response: The Horizon 2040 Comprehensive Plan identifies Old Milton Parkway east of Georgia 400 as a priority area in need of redevelopment and promotes retrofitting and mixed-use patterns to create activity nodes near or within existing suburban office parks. While the Brookside Small Area Plan does not include land use recommendations, the plan envisions creating a walkable, connected environment in an effort to re-position the suburban office park. Adding residential development is a means to re-position office parks by bringing residences closer to where people work. Additionally, Georgia State University is located across the street and is the largest property owner in Brookside. Walkable environments should be created near and around college campuses.

B. The extent to which the proposed designation is in compliance with the goals and policies of the Plan.

Response: The Horizon 2040 Comprehensive Plan includes policies to allow mixed use patterns that will create activity nodes in appropriate areas near or within existing suburban office developments.

C. The extent to which the proposed designation would require changes in the provision of public facilities and services.

Response: The proposed future land use change to allow a residential development would result in less impact on roads, including an 82% decrease in AM Peak Hour trips and 79% decrease in PM Peak Hour trips as compared to the existing office development on the property. The proposed change would increase demand on parks and recreation; however, amenity space is provided within the development, and the development is located within walking distance of Brookside Park and the Big Creek Greenway.

D. The extent to which the proposed designation would impact the public health, safety, and welfare.

Response: The proposal would not negatively impact public health, safety, and welfare. The intent of the proposal is to re-position the Brookside office park by adding residential to create activity nodes.

E. The extent to which additional land area is needed to be developed for a specific type of use.

Response: The current market demand provides an opportunity to re-position the Brookside office park while addressing the City's housing needs. The addition of housing in the Brookside office park is a means of re-positioning office by bringing residences closer to where people work.

F. The extent to which area demographics or projections are not occurring as projected.

Response: Not applicable.

STANDARDS FOR ZONING AND MASTER PLAN CHANGES

The Planning Commission and the City Council shall consider the following standards in considering a rezoning application, giving due weight or priority to those factors particularly appropriate to the circumstances of each application:

A. Whether the zoning proposal will permit a use that is suitable in view of the zoning use and development of adjacent and nearby property.

Response: While the Brookside Small Area Plan does not include land use recommendations, the plan envisions creating a walkable, connected environment in an effort to re-position the suburban office park. Adding residential development is a means to re-position office parks by bringing people closer to goods and services, and where they work.

B. Whether the zoning proposal will adversely affect the existing use or usability of adjacent or nearby property.

Response: The zoning proposal would not adversely affect the existing use of adjacent or nearby properties, which are developed with commercial and office uses, as well as Georgia State University. The intent of the proposal is to re-position the Brookside office park by adding a residential use that will bring people closer to goods and services, and where they work.

C. Whether the zoning proposal will adversely affect the natural environment.

Response: The applicant's proposal represents redevelopment of an existing office building and parking lot and would not adversely affect the natural environment.

D. Whether there are substantial reasons why the property cannot or should not be used as currently zoned.

Response: The property is zoned O-I and subject to the Brookside Master Plan Pod A, which is approved for 20,000 square feet/acre, or 1,676,000 square feet, of non-residential use. A variety of non-residential uses are permitted on the property including athletic facility, bank, clinic, church, congregate housing, day care center, research laboratory, office, and school (academic and commercial). The applicant's request to add residential development in the Brookside Master Plan would help re-position the office park by bringing residences closer to goods and services, and where people work.

E. Whether the zoning proposal will result in a use that will or could cause an excessive or burdensome use of public facilities or services, including but not limited to existing streets and transportation facilities, schools, water or sewer utilities, and police or fire protection.

Response: The proposal would not have a significant impact on public facilities and services. The proposal would result in less impact on roads, including an 82% decrease in AM Peak Hour trips and 79% decrease in PM Peak Hour trips as compared to the existing office development on the property. The proposed change would increase demand on parks and recreation; however, amenity space is provided within the development, and the development is located within walking distance of Brookside Park and the Big Creek Greenway.

F. Whether the zoning proposal is supported by new or changing conditions not anticipated or reflected in the existing zoning on the property.

Response: The Horizon 2040 Comprehensive Plan identifies Old Milton Parkway east of Georgia 400 as a priority area in need of redevelopment and promotes retrofitting and mixed-use patterns to create activity nodes near or within existing suburban office parks. While the Brookside Small Area Plan does not include land use recommendations, the plan envisions creating a walkable, connected environment in an effort to re-position the suburban office park. Adding residential development is a means to re-position office parks by bringing residences closer to goods and services, and where people work.

G. Whether the zoning proposal reflects a reasonable balance between the promotion of the public health, safety, morality, or general welfare against the right to unrestricted use of property.

Response: The proposal reflects a reasonable balance. While the Brookside Small Area Plan does not include land use recommendations, the plan envisions creating a walkable, connected environment in an effort to re-position the suburban office park. Adding residential development is a means to re-position office parks by bringing residences closer to goods and services, and where people work.

H. Whether there are substantial reasons why the property cannot be used in accordance with existing zoning.

Response: The property is zoned O-I and subject to the Brookside Master Plan Pod A, which is approved for 20,000 square feet/acre, or 1,676,000 square feet, of non-residential use. A variety of non-residential uses are permitted on the property including athletic facility, bank, clinic, church, congregate housing, day care center, research laboratory, office, and school (academic and commercial). The applicant's request to add residential development in the Brookside Master Plan would help re-position the office park by bringing residences closer to goods and services, and where people work.

I. The extent to which the zoning proposal is consistent with the Comprehensive Plan.

Response: The comprehensive land use plan designation of the subject property is 'Corporate Office', which requires an amendment to 'High Density Residential' to allow the applicant's proposal.

CONDITIONAL USE REVIEW CRITERIA

City staff has reviewed the applicant's request and compared it to the conditional use standards established in UDC Sec. 4.2.3 (B) which are as follows:

A conditional use otherwise permitted within a zoning district shall be considered to be compatible with other uses permitted in the district, provided that due consideration is given to the following objective criteria at a public hearing and satisfactory provisions, or arrangements are made for:

1. Access into and out of the property with regard to traffic and pedestrian safety, volume of traffic flow, and emergency vehicles, as well as the type of street providing access;

Response: Access to the site is proposed by way of an existing shared driveway on the south end of the proposed development. An existing driveway on the west side of the development is proposed to be closed in order to address sight-distance safety issues. Sufficient access is provided to support the conditional use.

2. The extent to which refuse areas, loading and service areas, off street parking, and buffers and screening are provided on the property.

Response: Site improvements referenced above are addressed within the proposed development.

3. Ensuring that the conditional use will not be injurious to the use and enjoyment of the environment or of other property in the immediate vicinity or diminish and impair property values within the surrounding neighborhood.

Response: The proposal is located within a suburban office park near an underutilized city park and there are no residential properties currently bordering the subject property. Approval of the conditional use would not negatively impact surrounding properties.

4. Ensuring that the conditional use will not increase local or state expenditures in relation to the cost of servicing or maintaining neighboring properties.

Response: Not applicable.

5. Ensuring that the conditional use will not impede the normal and orderly development of surrounding property for uses predominant in the area; and

Response: The addition of residential use at the subject property would not impede the normal and orderly development of surrounding properties. The proposed development would complement surrounding properties which are developed and approved as an office park, mixed-use development, commercial corridor, an underutilized city park, and Georgia State University.

6. Ensuring that the location and character of the conditional use is considered to be consistent with a desirable pattern of development for the city, in general.

Response: The addition of residential use at the subject property is consistent with the desirable pattern of development in the Brookside Small Area Plan. The proposed development would complement surrounding properties which are developed and approved as an office park, mixed-use development, commercial corridor, an underutilized city park, and Georgia State University.

7. Ensuring that the conditional use is appropriately separated from similar uses and conflicting uses, such as residences, government buildings, parks, churches, or schools.

Response: Not applicable.

VARIANCE REVIEW CRITERIA

The City of Alpharetta Unified Development Code Article IV, Section 4.5.3 outlines the criteria set forth for granting a variance. The ordinance specifically states..."a variance may be granted in whole or in part, or with conditions, in such individual case of unnecessary hardship upon a finding that":

(1) There are extraordinary and exceptional conditions pertaining to the particular piece of property in question because of its size, shape or topography; or

Response: The property has exceptional conditions due to its shape. The requested variances relate to re-positioning the Brookside office park by introducing a mixed-use development with residential uses and seeking consistency with the Brookside Small Area Plan. The variance to reduce the minimum office percentage was advertised out of an abundance of caution. The addition of the 8.76-acre property to the Portman Brookside mixed-use development reduces the office-institutional percentage from 25.2% to 17.4%. There is an additional 42.78 acres of office-institutional uses developed in Pod A of the Brookside Master Plan.

(2) The application of the Ordinance to this particular piece of property would create an unnecessary hardship; or

Response: Application of the ordinance would create an unnecessary hardship. The requested variances relate to re-positioning the Brookside office park by introducing a mixed-use development with residential uses and seeking consistency with the Brookside Small Area Plan. The variance to reduce the minimum office percentage was advertised out of an abundance of caution. The addition of the 8.76-acre property to the Portman Brookside mixed-use development reduces the office-institutional percentage from 25.2% to 17.4%. There is an additional 42.78 acres of office-institutional uses developed in Pod A of the Brookside Master Plan.

(3) There are conditions that are peculiar to the property which adversely affect its reasonable use or usability as currently zoned; or

Response: The property has peculiar conditions that adversely affect its reasonable use. The requested variances relate to re-positioning the Brookside office park by introducing a mixed-use development with residential uses and seeking consistency with the Brookside Small Area Plan. The variance to reduce the minimum office percentage was advertised out of an abundance of caution. The addition of the 8.76-acre property to the Portman Brookside mixed-use development reduces the office-institutional percentage from 25.2% to 17.4%. There is an additional 42.78 acres of office-institutional uses developed in Pod A of the Brookside Master Plan.

CONCURRENCES

Staff has reviewed the applicant's proposal against the established review criteria for a master plan amendment, comprehensive land use plan amendment, rezoning, conditional use, and variance. The 2040 Comprehensive Plan identifies Old Milton Parkway east of Georgia 400 as a priority area in need of redevelopment and promotes

retrofitting and mixed-use patterns to create activity nodes near or within existing suburban office parks. While the Brookside Small Area Plan does not include land use recommendations, the plan envisions creating a walkable, connected environment in an effort to re-position the suburban office park. The development proposal would bring residences closer to goods and services, and jobs. Additionally, Georgia State University is located across the street and is the largest property owner in Brookside. Walkable environments should be created near and around college campuses.

The property has exceptional and peculiar conditions due to its shape and location in the Brookside Small Area Plan. The requested variances relate to re-positioning the Brookside office park by introducing a mixed-use development with residential uses and seeking consistency with the Brookside Small Area Plan. The variance to reduce the minimum office percentage was advertised out of an abundance of caution. The addition of the 8.76-acre property to the Portman Brookside mixed-use development reduces the office-institutional percentage from 25.2% to 17.4%. There is an additional 42.78 acres of office-institutional uses developed in Pod A of the Brookside Master Plan.

CITIZEN PARTICIPATION PLAN

The report submitted by the applicant states that letters were mailed to each property owner within 500' of the subject property stating the applicant's intent. The report states that no comments were received. According to the applicant, one member of the public expressed support for the proposal at CZIM.

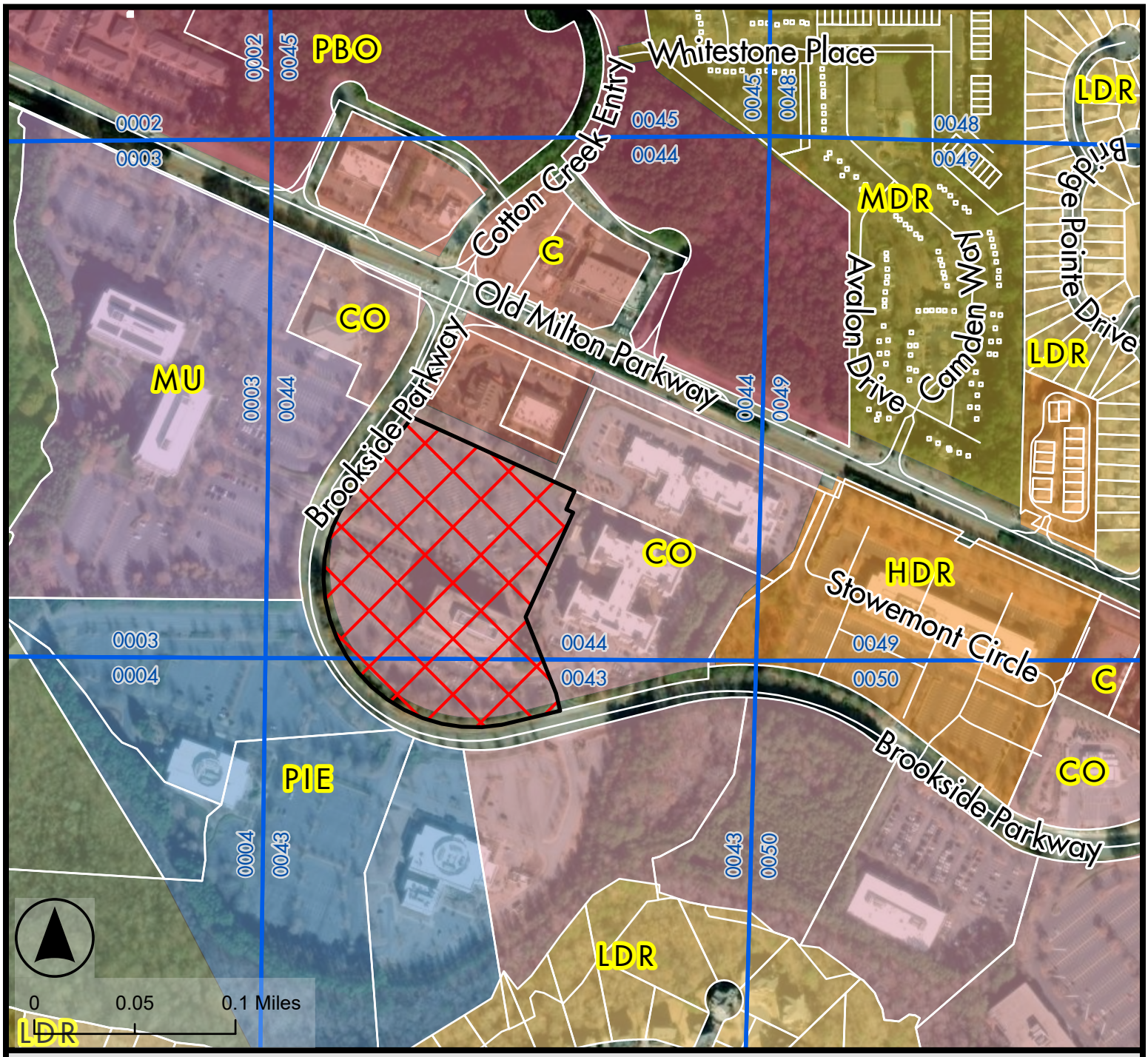
COMMUNITY ZONING INFORMATION MEETING

CZIM was held on January 14, 2026. There were no public comments on the sign-in sheet.

ATTACHMENTS:

- Map Series
- Amended Request & Updated Site Plan
- Updated Information
- CZIM
- Citizen Part B
- Application

CLUP-26-01, MP-26-03, Z-26-01, V-26-02



Future Land Use Map

CLUP-26-01, MP-26-03, Z-26-01, V-26-02

TPG Brookside West

D/LL: 1/1/004 & 0043

PC: 2/5/2026

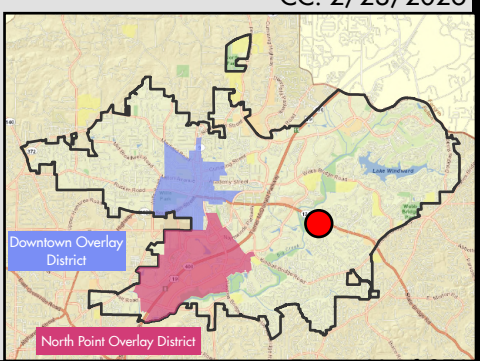
CC: 2/23/2026

Legend

- CLUP-26-01, MP-26-03, Z-26-01, V-26-02
- Land Lots
- Tax Parcels
- Alpharetta City Limits

Future Land Use 2040

- Commercial
- Corporate Office
- High Density Residential
- Low Density Residential
- Medium Density Residential
- Mixed Use
- Parks, Recreation, Open Space
- Professional Business Office
- Public, Institutional, Education

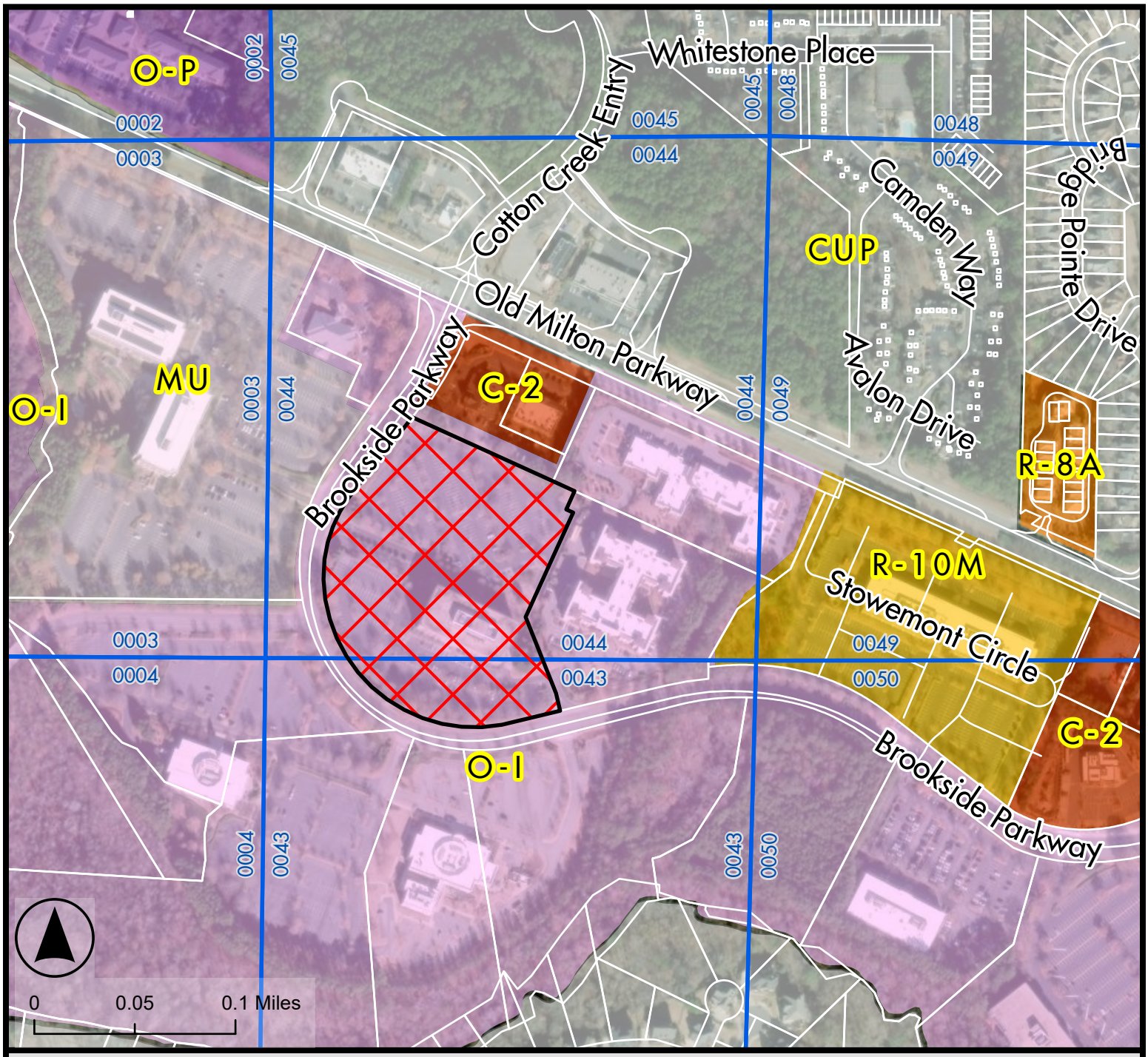


THE CITY OF ALPHARETTA GEORGIA

Credit: Microsoft, Vantor, Vantor, City of Alpharetta.

Location Map Provided by: Community Development - GIS

CLUP-26-01, MP-26-03, Z-26-01, V-26-02



Legend

- CLUP-26-01, MP-26-03, Z-26-01, V-26-02
- Land Lots
- Tax Parcels
- Alpharetta City Limits

Zoning District

- General Commercial
- CUP Community Unit Plan
- MU Mixed Use
- O-I Office Institutional
- O-P Office Professional
- R-10M Multi Family Residential (HDR)
- R-8A Single Family Attached Residential (Medium Density)

Zoning Map

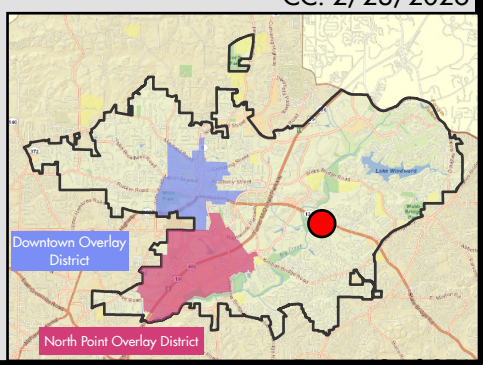
TPG Brookside West

CLUP-26-01, MP-26-03, Z-26-01, V-26-02

D/LL: 1/1/004 & 0043

PC: 2/5/2026

CC: 2/23/2026

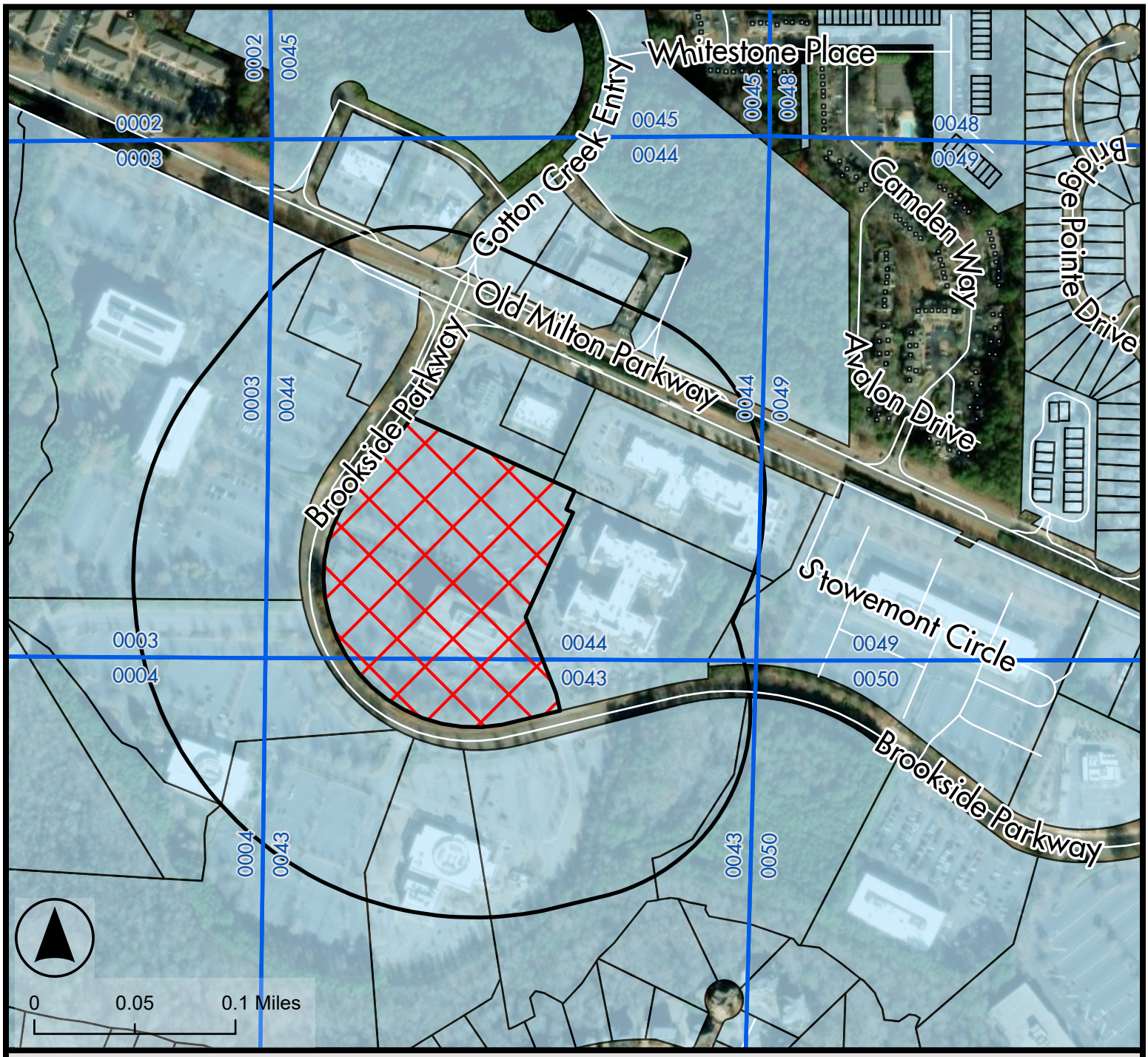


THE CITY OF ALPHARETTA GEORGIA

Credit: Microsoft, Vantor, Vantor, City of Alpharetta.

Location Map Provided by: Community Development - GIS

CLUP-26-01, MP-26-03, Z-26-01, V-26-02



Legend

- CLUP-26-01, MP-26-03, Z-26-01, V-26-02
- Land Lots
- Tax Parcels
- 500 ft Buffer
- Alpharetta City Limits

Location Map

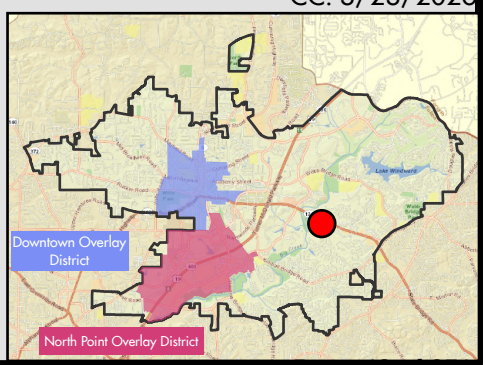
TPG Brookside West

CLUP-26-01, MP-26-03, Z-26-01, V-26-02

D/LL: 1/1/004 & 0043

PC: 3/5/2026

CC: 3/23/2026

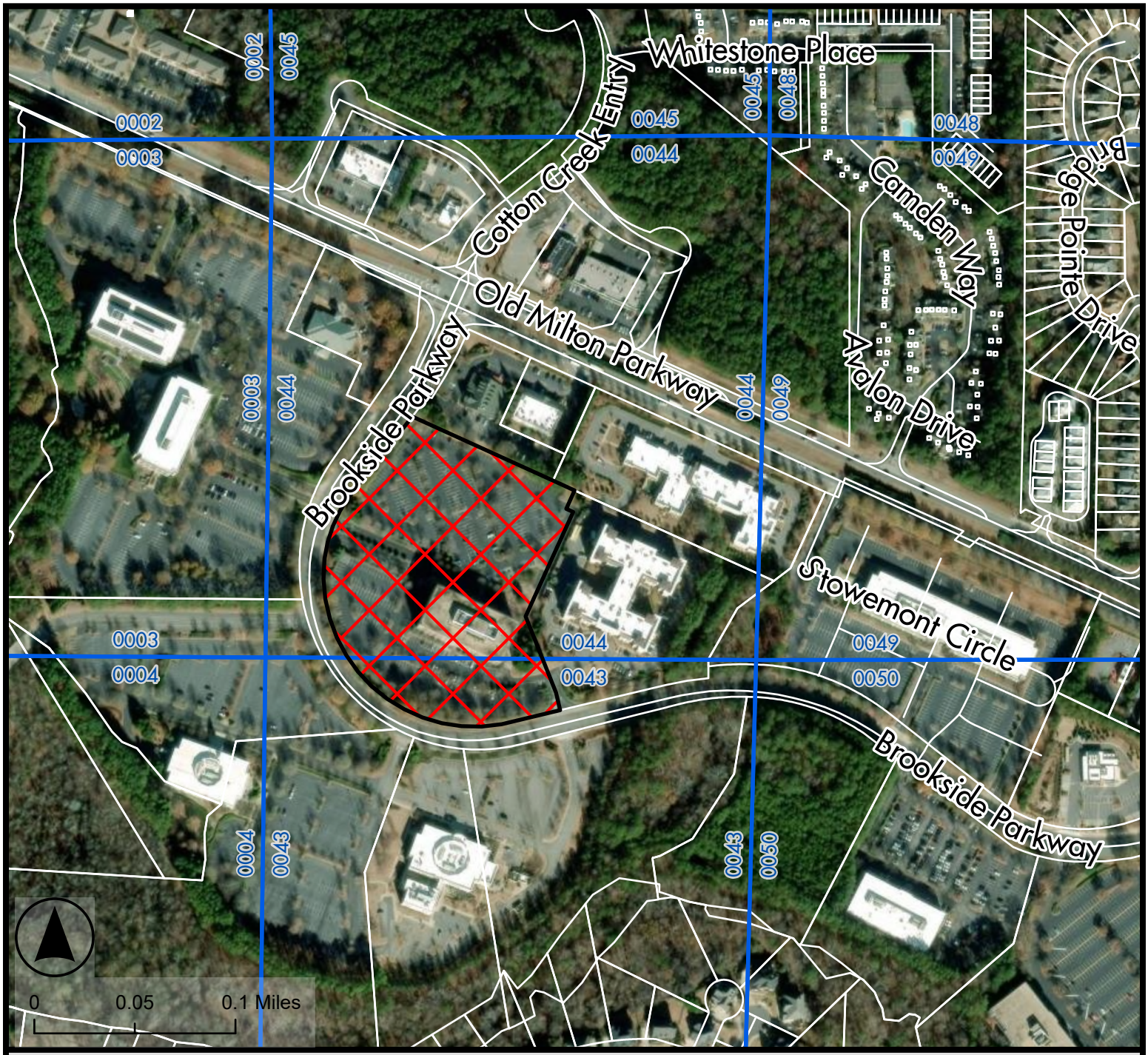


THE CITY OF ALPHARETTA GEORGIA

Credit: Microsoft, Vantor, Vantor, City of Alpharetta.

Location Map Provided by: Community Development - GIS

CLUP-26-01, MP-26-03, Z-26-01, V-26-02



Legend

- CLUP-26-01, MP-26-03, Z-26-01, V-26-02
- Land Lots
- Tax Parcels
- Alpharetta City Limits

Aerial Map

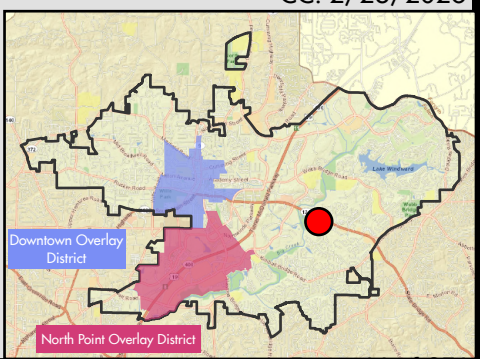
TPG Brookside West

CLUP-26-01, MP-26-03, Z-26-01, V-26-02

D/LL: 1/1/004 & 0043

PC: 2/5/2026

CC: 2/23/2026



THE CITY OF ALPHARETTA GEORGIA

Credit: Microsoft, Vantor, Vantor, City of Alpharetta.

Location Map Provided by: Community Development - GIS

Statement of Intent

Proposed Redevelopment of 3650 Brookside Pkwy
Update: April 2, 2026

Applicant:

Portman Holdings, LLC
C/O Mike Greene
303 Peachtree Center Ave NE #575
Atlanta, Georgia 30303

Subject Property:

Address	3650 Brookside Pkwy Alpharetta, GA 30022
Parcel Data	Parcel ID: 11 0020000302999 Land Lots 43 & 44 1st District, 2nd Section, City of Alpharetta
Acreage	8.7676

Current Zoning:

Zoning District	Office-Institutional
Master Plan Ordinance	MP-97-06-Brookside / Pod "A"
Future Land Use Designation	Corporate Office

Current Use:

The Subject Property is located within the 84-acre Pod "A" of the Brookside Master Plan. The Subject Property is improved with a 5-story, Class "B", 130,828 SF multi-tenant office building with 597 surface parking spaces built in 2001. The Subject Property is 84% vacant.



The Subject Property has access to and from Brookside Parkway via two full access curb cuts (one of which is shared via recorded access easement with the adjacent Mansions Senior Living residential community).

Intended Project:

Applicant seeks to develop a 104-unit residential development consisting of for-sale townhouses. These rear entry townhouse buildings will contain individual units of 18-foot, 20-foot, and 22-foot widths providing enhanced front elevations over standard townhomes. Residents of the development will enjoy the following amenities: pool with cabana, access to local retail and restaurants along the Old Milton Parkway corridor, and access to greenspaces in the Brookside area including the Brookside Park trail system. Parking will be provided with a 2-car garage per townhome unit with 2 cars parking in the driveway. Additionally, there will be 24 guest parking spaces in the community. The community may have gated, private streets.

The Intended Project is to be developed generally in accordance with the attached Concept Plan. The Applicant will remove the northern full access driveway to Brookside Parkway. The southern, shared driveway will remain full access. Applicant intends to work with the City in effectuating improvements to Brookside Pkwy as contemplated by the Brookside Small Area Plan.

Applicant's Request:

- Amend the Brookside master plan ordinance, MP-97-06, to permit residential uses within Pod "A" MU;
- Rezone the Subject Property from OI to MU;
- Approve a Conditional Use in the MU District to allow "Dwelling, 'For-Sale', Attached" pursuant to Unified Development Code Sec. 2.2.20.C.1.c.
- Amend the Horizon 2040 Comprehensive Plan Future Land Use Map designation for the Subject Property from CO to MU; and
- Approve concurrent variances and waivers as requested herein.

Supporting Narrative:

Applicant seeks to acquire the Subject Property and demolish the current office building and surface parking lot in order to develop the Intended Project. There is very little demand for the Subject Property in its current use as a Class "B", poorly-amenitized, surface-parked, suburban office building. In contrast, municipalities such as Alpharetta are finding it difficult to balance the demand for additional housing in their communities, and the need for more varied and diverse housing options sought by households today, against their own planning goals and objectives.

The Intended Project uniquely "threads the needle" in this case by replacing a broken use with much needed additional housing on the east side of Old Milton in a location which already includes denser housing options, and which will not impact existing, more "traditional", less dense housing whose stakeholders often seek "protected" status. In doing so, the Intended Project achieves many of the goals already expressed by the City in its 2040 Horizon Comprehensive Plan and the Brookside Small Area Plan. In addition, it is Applicant's belief – again, consistent with the City's own vision statements – that the Intended Project will

~ provide the type of housing within walking or biking distance that is often in demand by office users today, thereby supporting, in part, the remaining office space and future redevelopment within Brookside;

~ locate households (not just Senior Living households) within Brookside which will actively support the planned and existing, well-occupied, retail and restaurants in proximity on Old Milton Pkwy; and

~ provide impetus for bicycle and pedestrian improvements on Brookside Pkwy which will will in turn improve the overall long-term viability of the Brookside Small Area, increase utilization of the City's green assets in the vicinity, and promote further capital investment / redevelopment on the east side of Old Milton Pkwy.

Background

The Subject Property is located within the 155-acre "Brookside" master plan adopted in 1997 and developed primarily in the 2000's, ultimately reaching 909,000 SF of office space in 14 office buildings. Brookside is in many ways a typical suburban office campus of this vintage – stand-alone buildings with little or no connectivity to

one another with little or no campus amenities. In fact, the very design of these types of office campuses ensures this lack of connectivity and walkability. Office buildings are placed "deep" on their respective sites, with surface parking lots "intervening" between the actual human use and the connecting streetscapes. In the case of Brookside, fully 1/3rd of the developed land, 57.3 acres, is dedicated to asphalt, surface parking lots, and those lots, in turn, result upwards of 200' setbacks for buildings from streetscapes, completely disconnecting human use and scale within the campus.

Suburban office campuses such as Brookside are among the hardest hit by the changes affecting office utilization in our nation since the COVID pandemic of 2020 – 22. The office vacancy within Brookside has increased in recent years. These rising vacancy levels certainly raise the specter of a "doom loop" occurring within Brookside, potentially negatively affecting the built environment experiences not only for the remaining office space within Brookside, but also the Georgia State Alpharetta campus, Northpoint church, and the retail / restaurant establishments along Old Milton Parkway. Projects such as The Providence Group's Brookside Reserve project of 160 "for sale" condominiums and Portman's Brookside Village project of 130,000 square feet of office, 60,000 square feet of retail & restaurant, 75 townhomes, and 335 multifamily units, and this application's proposed 104 townhomes provide a remedy to the suffering office market while supporting one another and improving the whole of Brookside.

This Application will not attempt to delineate the many, and complex, cultural and demographic trends which have affected commercial real estate, household formation and housing choices post-pandemic other than to note that those changes are now commonly accepted as secular, not cyclical. Some of these paradigm shifts were evident even before the pandemic: the advent of e-commerce, the efficiencies of "paperless" and "virtual" business activity, the delay in marriage and childbearing, the increasing prevalence of "single person" households, the advent of town center nodes, the desire for walkable, connected, small-scale environments.

Horizon 2040 Comp. Plan

The City was early in recognizing these changes and in adopting planning principles in response as vision statements and guidance to the development community. The first and most comprehensive of those vision statements is the Horizon 2040 Comprehensive Plan (the "Comp. Plan").

The Comp. Plan specifically identifies the East Side of Old Milton Parkway as a "Priority Area" for redevelopment with a focus on creating a mix of uses, including new residential housing and improved streetscapes / pedestrian environments (pg. 59). Of particular note is the following:

Housing (pg. 34)

- Redevelop large surface parking lots in North Point and suburban office areas with residential uses;

- Diversify housing opportunities;
- Address missing housing types / price points; and
- Create walkable neighborhoods.

Needs & Opportunities – Office & Retail Vacancies (pg. 35)

- Develop a plan to deal with office and retail vacancies; and
- Vacancies provide an opportunity for re-use or redevelopment;

Needs & Opportunities – Growth Management (pg. 35)

- Limit expansion of retail uses;
- Decline of suburban office provides opportunity to retrofit or redevelop; and
- Improve walkability and connectivity along the Old Milton Parkway corridor east of Georgia 400.

Brookside Small Area Plan

Adopted within the Comp. Plan is the Brookside Small Area Plan, a specific planning statement issued by City Council in November of 2022 (the "Brookside Plan"). The Brookside Plan notes many of the issues raised above and seeks to promote change through many of the strategies expressed in the Comp. Plan.

The Intended Project has been designed to achieve the goals of the Small Area and the Comp. plan by introducing new dense housing adjacent to the existing dense, Senior Living housing provided at The Mansions, the planned Portman mixed-use project across Brookside Parkway to the west, improve streetscapes and pedestrian experiences, and replace asphalt parking lots with desirable development and greenspaces.

Standard of Review

The Unified Development Code (the "UDC") establishes the following criteria for use in evaluating and taking action on a Rezoning request (see generally Sec. 4.2.3). For the reasons stated herein, the Intended Project satisfies each criteria.

- <u>Will the Intended Project be compatible with surrounding properties?</u>

  Applicant's Response – Yes.

  Although the Subject Property is located within Brookside office campus, the reality is that the Subject Property is already surrounded by a mix of diverse, but complementary, uses . . . including both for-sale and for-rent housing. The Intended Project will integrate well into this existing development fabric.

  East: The Mansions at Alpharetta, a 124-unit Senior Living housing community constructed in 2016.

North: The Subject Property is bounded to the north by two parcels fronting Old Milton Pkwy. These parcels contain retail and restaurant uses. Located across Old Milton Pkwy, immediately opposite the Subject Property are more retail and restaurant uses.

West: Located to the west across Brookside Parkway are two office buildings that have been approved for a mixed-use development to be executed by Portman Holdings.

South: The Subject Property is bounded to the south by Brookside Pkwy. Located across Brookside Pkwy, opposite the Subject Property to the south is Georgia State University's Alpharetta campus.

- Will the Intended Project adversely affect the use or usability of surrounding properties?

  Applicant's Response – No.

  The Intended Project will have a positive effect on the value of surrounding properties. The Intended Project represents a significant investment within a suburban office campus which is currently 16% occupied and facing continuing financial failure and the potential for entering a "doom loop". The Intended Project will ultimately locate 104 new households in the very center of the Brookside and its surrounding uses. In doing so, the Intended Project will introduce much needed "24-hour" human presence along Brookside Pkwy, supporting the office, commercial, and retail uses and reinvigorating pedestrian presence and activity.

- Will the Intended Project adversely affect the natural environment?

  Applicant's Response – No.

  The Intended Project will, consistent with the goals of the Brookside Small Area Plan, replace 8+ acres of impervious asphalt parking with planned development providing current, code-compliant practices for stormwater management and tree cover.

- Are there substantial reasons the Subject Property cannot or should not be used as currently zoned? Are there new or changing conditions (not anticipated or reflected in the current zoning) which support the Applicant's Request.

  Applicant's Response – Yes.

The Subject Property must be redeveloped with a new use which will meet the needs of households seeking higher density / "infill" housing options within Alpharetta. In doing so Applicant believes households seeking to live in the Intended Project will, in turn, provide support for other current commercial, office and retail uses along Milton Pkwy without negatively impacting existing stakeholders.

- Would the Intended Project be an excessive or burdensome use of public facilities or services?

Applicant's Response – No.

Utilities and other City services exist in sufficient capacity to serve the Intended Project. In addition, while the Intended Project is not designed for or targeted at households with school-age children (SF's, amenities, etc.), it appears that Fulton County public school capacity is well below full utilization for this location:

ES: GADOE capacity for New Prospect Elementary is 825 students; enrollment is projected to be 440 students for the 2025/2026 school year.

MS: GADOE capacity for Webb Bridge Middle School is 1,150 students; enrollment is projected to be 1,197 students for 2025/2026. It is likely that Fulton County will redraw this school district since the next closest middle school, Taylor Road, is significantly under its GADOE capacity (1,400 capacity / 1,146 projected enrollment).

HS: GADOE capacity for Alpharetta High School is 2,200 students; enrollment is projected to be 1,840 for 2025/2026.

Capacity data from Fulton County Historical and Projected Enrollment: https://go.boarddocs.com/ga/fcss/Board.nsf/files/BYPM6459A7B8/$file/Historical%20and%20Projected%20Enrollment.pdf)

The Applicant is submitting a Trip Generation Memo with this application demonstrating no excessive or burdensome impacts on the surrounding roadways.

- Does the Applicant's Request reflect a reasonable balance between the promotion of public health, safety, morality or general welfare against the right to unrestricted use of the property?

Applicant's Response – Yes.

The Intended Project has been conceived in response to changing economic and cultural conditions affecting the Subject Property's current use and has been designed with the goals of the Brookside Small Area Plan in mind.

- Is the Intended Project consistent with Alpharetta's Comprehensive Plan?

  Applicant's Response – Yes, but a FLUM amendment is required.

  The Intended Project is consistent with explicit, on-point policies and strategies of the 2040 Horizon Comprehensive Plan, including

  ~ the provisions of the Brookside Small Area Plan, which are incorporated into the Comprehensive Plan (pg. 62).

  ~ "Promote and encourage residential densities and designs that ensure varied living areas and housing types." (Community Housing Vision Policy, pg. 40).

  ~ "Promote redevelopment of highway corridors, with an emphasis on North Point Pkwy, Old Milton Pkwy and South Main Street, into pedestrian-friendly, mixed-use environments to create viable, growing and attractive areas" (Community Land Use Vision Policy, pg. 46).

  ~ "Allow mixed use patterns that will create activity nodes . . . within exiting suburban office; "[a]llow mixed use patterns that will create activity nodes in appropriate areas . . . that provide jobs and services with walking distance of residences, preserve open spaces and make public transportation more effective" and and "[e]ncourage creative urban design solutions that improve physical character" (Community Land Use Policies 2.3, 8.2, and 10, pgs. 46-47).

  However, to effectuate these goals Applicant is requesting a FLUM amendment to change the Subject Property's use designation from CO to HDR. The Applicant's request is also compatible with other land use designations in the area. As an example, The Providence Group's Brookside Reserve project at 3750 Brookside Parkway is designated as HDR.

Conditional Use Request

Applicant requests a Conditional Use in the MU district for "Dwelling, 'For-Sale', Attached as provided in UDC Sec. 2.2.20.C.1.c. The requested Conditional Use addresses the Conditional Use Standards as follows:

1. Access into and out of the property with regard to traffic and pedestrian safety, volume of traffic flow, and emergency vehicles, as well as the type of street providing access;

   Response: Access to the site is proposed by way of one (1) existing driveway located on Brookside Parkway. This full-access driveway is shared with the adjacent property immediately to our east. There is sufficient access to support the for-sale townhomes.

2. The extent to which refuse areas, loading and service areas, off street parking, and buffers and screening are provided on the property;

   Response: Refuse areas and loading and service areas are not applicable to the proposed residential ("for-sale" townhouse) community. Off street parking, buffers, and screening are sufficiently addressed in the proposal.

3. Ensuring that the conditional use will not be injurious to the use and enjoyment of the environment or of other property in the immediate vicinity or diminish and impair property values within the surrounding neighborhood;

   Response: The proposal replaces a largely vacant office building and its parking field with upscale, "for sale" residential townhomes. Thus, approval of the conditional use will not negatively impact surrounding properties.

4. Ensuring that the conditional use will not increase local or state expenditures in relation to the cost of servicing or maintaining neighboring properties;

   Response: Not applicable

5. Ensuring that the conditional use will not impede the normal and orderly development of surrounding property for uses predominant in the area;

   Response: The addition of "for sale" townhomes at the subject property will not impede the normal and orderly development of surrounding property. The proposal will complement and enhance currently developed surrounding properties and Portman's proposed mixed-use project.

6. Ensuring that the location and character of the conditional use is considered to be consistent with a desirable pattern of development for the city, in general; and

   Response: The addition of more "for sale" residential use is consistent with the desirable pattern of development in the Brookside area. Additional residents will serve to support and complement surrounding uses.

7. Ensuring that the conditional use is appropriately separated from similar uses and conflicting uses, such as residences, government buildings, parks, churches or schools.

   Response: The proposal provides sufficient separation and appropriate buffers from adjacent uses, which uses would not be considered conflicting.

Variances & Waivers

Applicant requests the following variances and waivers. Each requested variance or waiver meets the following approval criteria for the reasons stated below:

(1) There are extraordinary and exceptional conditions pertaining to the Subject Property resulting from its size, shape, and topography;

(2) The Application of the Zoning Code without the requested variance or waiver would create an unnecessary hardship;

(3) There are conditions relevant to the Subject Property which are peculiar to it;

(4) And those conditions are not the result of any actions of the Applicant or current property owner; and

(5) Relief, if granted, will not cause substantial detriment to the public good nor impair the purposes or intent of applicable Zoning Code or other code provisions.

- Office/Institutional Use/ UDC Sec. 2.2.20.B.4

  The Applicant seeks to reduce the required percentage of Office/Institutional Use within the MU from 25% to 17%. This calculation is based on the combined area of the subject 8.77-acre site and the 19.68-acre MU site directly across Brookside Parkway to the west. The 19.68-acre meets the 25% requirement alone, however when combined with the subject property's 8.77-acres that percentage falls to 17%. The overall office space within the Brookside Pod A, however, will have well above 25% office space when the remaining offices are counted. As a result, there will be no public detriment from the grant of this variance.

- Buffer/ UDC Sec. 3.2.8.B.1.a

  The Applicant seeks to provide a 15-foot planted buffer in lieu of the 50-foot undisturbed buffer along the property lines bordering O-I and C-2 districts to allow grading and construction of the townhomes. The parcels to the east and north of the Subject Property are currently developed with a mix of restaurant/retail (north) and senior residential (east). To mitigate any impacts from the disturbance and reduction in width the Applicant will be providing additional landscaping to screen and buffer the proposed residences against the adjacent property.

Preservation of Rights:

The Applicant respectfully submits that the existing zoning and land use designation on the Subject Property and any intervening designation except for that requested, are unconstitutional and that a refusal to approve the proposed - rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would be

unlawful, arbitrary, capricious, irrational and a manifest abuse of discretion; all in violation of the Fifth Amendment and Fourteenth Amendment of the Constitution of the United States, and Article I, Section I, Paragraph I and Article I, Section III, Paragraph I of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would discriminate unfairly between the owner of the Subject Property and other property owners similarly situated, in violation of the Fifth Amendment and Fourteenth Amendment of the Constitution of the United States, and Article I, Section I, Paragraph II of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would amount to a taking of property, in violation of the Fifth Amendment and Fourteenth Amendment of the Constitution of the United States, and Article I, Section I, Paragraph I and Article I, Section III, Paragraph I of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would be unjustified from a fact-based standpoint and instead would result only from constituent opposition, which would be an unlawful delegation of authority in violation of Article IX, Section II, Paragraph IV of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances, or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would be invalid inasmuch as the City of Alpharetta Zoning Ordinance is unlawful, null and void because its adoption and map adoption/maintenance did not and does not comply with the requirements of its predecessor ordinance and/or the Zoning Procedures Law, O.C.G.A. § 36-66-1, et seq. and the Georgia Planning Act, §§ 45-12-200, et seq., and 50-8-1, et seq. The City of Alpharetta Zoning Ordinance lacks adequate standards for the City Council to exercise their powers to review this Application. Specifically, the "criteria" are not sufficient to contain the discretion of the City Council and to provide the Courts with

a reasonable basis for judicial review. Because the stated standards (individually and collectively) are too vague and uncertain to provide reasonable guidance, the Zoning Ordinance is unlawful and violates, among other things, the Fifth Amendment and Fourteenth Amendment of the Constitution of the United States and Article I, Section I, Paragraphs I and II of the Constitution of the State of Georgia.

Any limitation on the time for presentation of the issues before the City Council, which has the power to zone and rezone property, is a violation of the guarantees of free speech under the First Amendment of the Constitution of the United States and Article I, Section I, Paragraph V of the Constitution of the State of Georgia. Further, said limitations are in violation of the right to petition and assemble, in violation of the First Amendment of the Constitution of the United States and Article I, Section I, Paragraph IX of the Constitution of Georgia, as well as the due process clauses of the United States and Georgia Constitutions.

Opponents to this request lack standing, have failed to exhaust administrative remedies, and have waived their rights to appeal by failing to assert legal and constitutional objections.

PROPERTY DESCRIPTION

Being all that tract or parcel of land lying and being in Land Lots 2, 3 and 44, 1st District, 2nd Section, City of Alpharetta, Fulton County, Georgia and being more particularly described as follows:

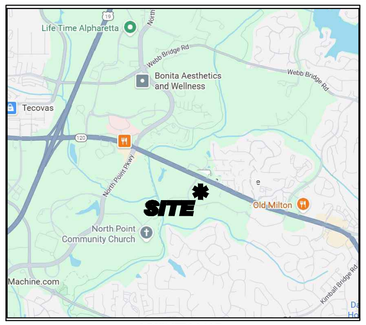
COMMENCING at the point of intersection of the southerly right-of-way line of Old Milton Parkway a.k.a. State Route 120 (having an apparent variable width public right-of-way) and the easterly right-of-way line of Brookside Parkway (having an apparent 80' public right-of-way); thence, leaving the aforesaid POINT OF COMMENCEMENT and continuing with the aforesaid right-of-way line of Brookside Parkway South 82° 30' 49" West, 41.86 feet; thence, South 24° 28' 08" West, 114.41 feet; thence, 68.51 feet along the arc of a curve deflecting to the right, having a radius of 852.00 feet and a chord bearing and distance of South 29° 19' 38" West, 68.49 feet; thence, North 65° 32' 15" West, 12.10 feet; thence, 65.49 feet along the arc of a curve deflecting to the right, having a radius of 840.00 feet and a chord bearing and distance of South 33° 58' 02" West, 65.47 feet to a capped rebar (, PBS&J PROP COR,) found and the POINT OF BEGINNING.

Thence, from said POINT OF BEGINNING as thus established and continuing with the aforesaid right-of-way line of Brookside Parkway

1. South 65° 28' 51" East, 398.98 feet to a capped rebar (, PBS&J PROP COR,) found; thence,
2. South 65° 28' 51" East, 62.46 feet to a capped rebar (, PBS&J PROP COR,) found; thence,
3. South 24° 31' 09" West, 52.90 feet to a PK Nail found; thence,
4. South 65° 28' 51" East, 20.04 feet to a PK Nail found; thence,
5. South 24° 31' 09" West, 301.46 feet to a point; thence,
6. South 21° 41' 22" East, 215.45 feet to a PK Nail found; thence,
7. South 13° 28' 59" East, 47.78 feet to a PK Nail found; thence,
8. South 76° 31' 02" West, 149.17 feet to a capped rebar (, PBS&J PROP COR,) found; thence,
9. 960.70 feet along the arc of a curve deflecting to the right and having a radius of 385.00 feet and a chord bearing and distance of North 31° 59' 52" West, 730.15 feet to a 1/2 inch rebar found; thence,
10. North 39° 29' 15" East, 189.68 feet to a 1/2 inch rebar found; thence,
11. 48.19 feet along the arc of a curve deflecting to the left and having a radius of 840.00 feet and a chord bearing and distance of North 37° 50' 38" East, 48.18 feet to the POINT OF BEGINNING, containing 381,916 square feet or 8.7676 acres of land, more or less.

Described property is subject to all rights-of-way (public and private) and easements, both recorded and unrecorded.





VICINITY MAP
not to scale

SITE DATA:

SITE AREA	8.7676 ACRES

ZONING

EXISTING ZONING	O-I
PROPOSED ZONING	MU
ZONING JURISDICTION	CITY OF ALPHARETTA

DEVELOPMENT TYPE

SINGLE FAMILY ATTACHED TOWNHOMES	104

DEVELOPMENT STANDARDS

FRONT SETBACK	20 FEET FROM BROOKSIDE PKWY
MINIMUM BUILDING SEPARATION	20 FEET
MAXIMUM BUILDING HEIGHT	3 STORIES
MINIMUM LOT WIDTH	18 FEET
MINIMUM LOT SIZE	NONE

PARKING

GARAGE	208
DRIVEWAY	208
GUEST SPACES	24
TOTAL	440

LAND USE CALCULATIONS

(MU AREA= 28.45 AC)	REQUIRED	PROVIDED
OFFICE	MIN. 17%** (4.84 AC)	17.4% (4.95 AC)
COMMERCIAL	MIN. 10% (2.85 AC)	12.1% (3.44 AC)
RESIDENTIAL	MIN. 25% (7.12 AC)	70.5% (20.06 AC)

OPEN SPACE CALCULATIONS

(MU AREA= 28.45 AC)	REQUIRED	PROVIDED
CIVIC SPACE:	MIN. 10% (2.85 AC)	0.88* AC (2.93* AC)
*MULTI-USE TRAIL CONNECTION AND IMPROVEMENTS		
AMENITY SPACE:	MIN. 1 AC/100 PPL (12.96 AC)	2.00 AC (13.70 AC)
POPULATION = 2.52 PPL/UNIT X 514 UNITS= 1,296 PPL		

RESIDENTIAL DENSITY
(BROOKSIDE MASTER PLAN 'POD A' AREA = 84 AC)

MULTIFAMILY RESIDENTIAL	335
TOWNHOMES (BROOKSIDE VILLAGE)	75
TOWNHOMES	104
TOTAL	514 (6.12 U/A)

NOTES

1. SPEED LIMIT OF BROOKSIDE PARKWAY IS 35 MPH.
2. ACCORDING TO THE U.S. FISH AND WILDLIFE SERVICE NATIONAL WETLANDS INVENTORY - WETLANDS ARE NOT LOCATED ON THIS SITE.
3. ACCORDING TO THE FEMA FLOOD INSURANCE RATE MAP FOR FULTON COUNTY 13121C0078F and 13121C0086F, EFFECTIVE DATE 9/18/2013, THE PROPERTY DOES NOT FALL WITHIN A DESIGNATED FLOOD ZONE "A" (AREAS OF 100 YEAR FLOOD)
4. WATERS OF THE STATE ARE WITHIN 200' OF THIS PROPERTY.
5. THE CHATTAHOOCHEE RIVER IS NOT WITHIN 2000' OF THIS PROPERTY.
6. ALPHARETTA FIRE DEPARTMENT SHALL APPROVE ROAD LAYOUT AND ENTRANCES.
7. WATER SERVICE SHALL BE PROVIDED BY FULTON COUNTY. EXISTING WATER SERVICE WILL BE USED
8. SANITARY SEWER SERVICE WILL BE PROVIDED BY FULTON COUNTY. EXISTING SEWER WILL BE TAPPED ON SITE.
9. THE PROPOSED DEVELOPMENT MAY BE GATED AND HAVE PRIVATE STREETS.
10. SPECIMEN TREE LOCATIONS TAKEN FROM TREE STUDY PERFORMED BY BROOKWOOD TREE CONSULTANTS.
11. STOOPS, PATIOS, SIDEWALKS AND UTILITIES ARE TO BE ALLOWED TO ENCROACH INTO THE 10' STREET LANDSCAPE STRIP.

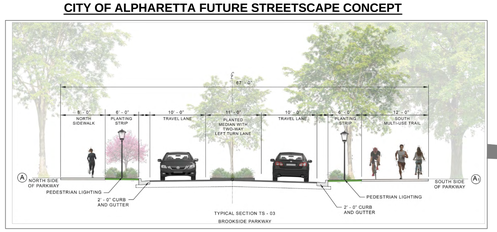
CONDITIONAL USE

ALPHARETTA UDC § 2.2.20.B.1 TO ALLOW 'DWELLING, 'FOR SALE' ATTACHED' UNITS.

VARIANCES

1. ALPHARETTA UDC § 3.2.8.B.1.A TO REDUCE THE 50-FOOT UNDISTURBED BUFFER TO A 15-FOOT PLANTED BUFFER.
2. ALPHARETTA UDC § 2.2.20.B.4 TO REDUCE OFFICE/INSTITUTIONAL USE MINIMUM FROM 25 PERCENT TO 17** PERCENT.

CITY OF ALPHARETTA FUTURE STREETSCAPE CONCEPT



TYPICAL SECTION TS - 03
BROOKSIDE PARKWAY

SURVEY NOTES

1. ALL BOUNDARY AND TOPOGRAPHIC INFORMATION TAKEN FROM THE SURVEY BY TERRAMARK LAND SURVEY INC, ON 5-21-2025.
2. UNLESS OTHERWISE SPECIFIED, ALL DISTANCES SHOWN ARE HORIZONTAL GROUND DISTANCES.

ZONING PLAN

BROOKSIDE TOWNHOMES

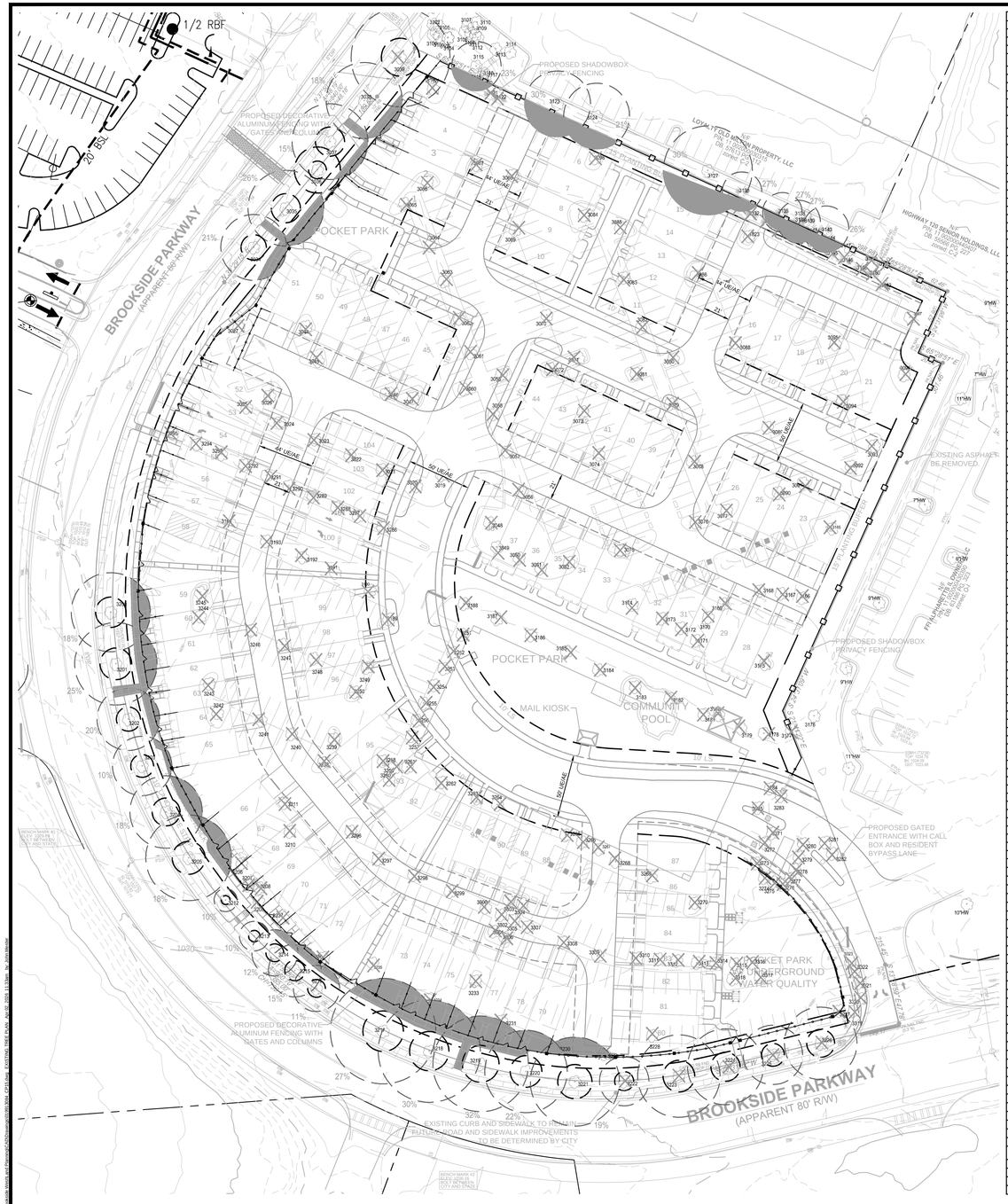
Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

GEORGIA REGISTERED LANDSCAPE ARCHITECT EDWARD J. ANDERSON 1395

04/01/2026
SCALE 1" = 40'
JOB #019913084

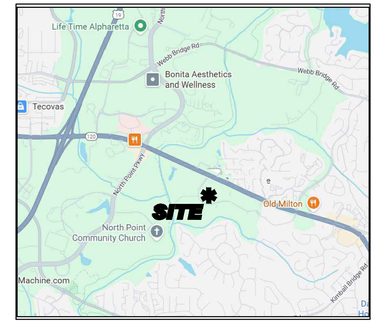
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Kimley»Horn

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3650 Brookside Parkway Tree Assessment

Tag Number	DBH	Species	Common Name	Condition	Notes	Specimen
3106	6	Acer buergerianum	Trident maple	Fair	Suppressed canopy	
3089	6	Acer rubrum	Red maple	Poor	Dieback in trunk and canopy	
3073	6	Acer rubrum	Red maple	Poor	Trunk wound with decay	
3074	6	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy	
3088	6	Acer rubrum	Red maple	Fair	Light dieback in canopy	
3328	6	Acer rubrum	Red maple	Good	Boundary tree	
3336	6	Acer rubrum	Red maple	Good	Boundary tree	
3070	7	Acer rubrum	Red maple	Poor	Decay in trunk; dieback in canopy	
3071	7	Acer rubrum	Red maple	Fair	Light dieback in canopy	
3072	7	Acer rubrum	Red maple	Good		
3069	7	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy	
3337	7	Acer rubrum	Red maple	Good	Boundary tree	
3339	8	Acer rubrum	Red maple	Good	Boundary tree	
3094	9	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy	
3081	10	Acer rubrum	Red maple	Poor	Dieback in canopy	
3080	11	Acer rubrum	Red maple	Poor	Dieback in canopy	
3228	11	Acer rubrum	Red maple	Good		
3082	12	Acer rubrum	Red maple	Good		
3083	12	Acer rubrum	Red maple	Good		
3021	13	Acer rubrum	Red maple	Good		
3059	13	Acer rubrum	Red maple	Good		
3081	13	Acer rubrum	Red maple	Good		
3083	13	Acer rubrum	Red maple	Good		
3079	13	Acer rubrum	Red maple	Good		
3082	13	Acer rubrum	Red maple	Good		
3172	13	Acer rubrum	Red maple	Good		
3085	13	Acer rubrum	Red maple	Good		
3109	13	Acer rubrum	Red maple	Good		
3019	14	Acer rubrum	Red maple	Good		
3020	14	Acer rubrum	Red maple	Good		
3023	14	Acer rubrum	Red maple	Good		
3057	14	Acer rubrum	Red maple	Good		
3058	14	Acer rubrum	Red maple	Good		
3064	14	Acer rubrum	Red maple	Good		
3063	14	Acer rubrum	Red maple	Fair	Light decay in pruning wound	
3078	15	Acer rubrum	Red maple	Good		
3083	15	Acer rubrum	Red maple	Good		
3181	15	Acer rubrum	Red maple	Good		
3182	15	Acer rubrum	Red maple	Good		
3185	15	Acer rubrum	Red maple	Good		
3187	15	Acer rubrum	Red maple	Good		
3190	15	Acer rubrum	Red maple	Good		
3230	15	Acer rubrum	Red maple	Good		
3231	15	Acer rubrum	Red maple	Good		
3232	15	Acer rubrum	Red maple	Good		
3088	15	Acer rubrum	Red maple	Poor	Trunk wounds with fungal fruiting bodies and decay	
3089	15	Acer rubrum	Red maple	Poor	Trunk wounds and dieback in trunk	
3188	16	Acer rubrum	Red maple	Good		
3191	16	Acer rubrum	Red maple	Good		
3192	16	Acer rubrum	Red maple	Good		
3194	16	Acer rubrum	Red maple	Good		
3281	16	Acer rubrum	Red maple	Good		
3282	16	Acer rubrum	Red maple	Good		
3193	17	Acer rubrum	Red maple	Good		
3233	17	Acer rubrum	Red maple	Fair	Light decay in pruning wound	
3024	18	Acer rubrum	Red maple	Good		
3206	18	Acer rubrum	Red maple	Good		
3234	18	Acer rubrum	Red maple	Good		
3066	19	Acer rubrum	Red maple	Good		
3235	20	Acer rubrum	Red maple	Good		
3236	20	Acer rubrum	Red maple	Good		
3237	20	Acer rubrum	Red maple	Good		
3025	22	Acer rubrum	Red maple	Good		
2173	7	Acer saccharum	Sugar maple	Good		
3097	8	Acer saccharum	Sugar maple	Good		
3063	9	Acer saccharum	Sugar maple	Good		
3096	9	Acer saccharum	Sugar maple	Good		
3092	10	Acer saccharum	Sugar maple	Good		
3174	11	Acer saccharum	Sugar maple	Good		
2165	14	Acer saccharum	Sugar maple	Good		
3324	6	Cryptomeria japonica	Cryptomeria	Good		
3328	6	Cryptomeria japonica	Cryptomeria	Good		
3327	8	Cryptomeria japonica	Cryptomeria	Good		
3103	8	Cryptomeria japonica	Cryptomeria	Good		
3104	8	Cryptomeria japonica	Cryptomeria	Good		
3108	8	Cryptomeria japonica	Cryptomeria	Good		
3110	8	Cryptomeria japonica	Cryptomeria	Good		
3325	8	Cryptomeria japonica	Cryptomeria	Good		
3106	9	Cryptomeria japonica	Cryptomeria	Good		
3107	9	Cryptomeria japonica	Cryptomeria	Good		
3111	9	Cryptomeria japonica	Cryptomeria	Good		
3101	10	Cryptomeria japonica	Cryptomeria	Good		
3112	10	Cryptomeria japonica	Cryptomeria	Good		
3100	11	Cryptomeria japonica	Cryptomeria	Good		
3102	11	Cryptomeria japonica	Cryptomeria	Good		
3105	11	Cryptomeria japonica	Cryptomeria	Good		
3113	11	Cryptomeria japonica	Cryptomeria	Good		
3272	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3281	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3282	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3275	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3276	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3279	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3280	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3271	14	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3277	14	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3274	15	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3278	16	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3273	17	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3066	10	Ilex 'Emily Brunner'	Emily Brunner Holly	Good		
3063	13	Ilex 'Emily Brunner'	Emily Brunner Holly	Fair	Chlorotic foliage	
3064	14	Ilex 'Emily Brunner'	Emily Brunner Holly	Good		
3320	8	Ilex cornuta Burfordii	Burford holly	Fair	Multi stem – 4/2/2; light dieback	
3321	8	Ilex cornuta Burfordii	Burford holly	Poor	Multi stem – 4/2/2; dieback	
3288	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3291	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3292	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3322	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3323	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3286	11	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/3/3	
3284	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3289	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3287	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3299	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3290	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3283	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/5	
3318	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/4/3	
3287	13	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 6/5/2	
3294	13	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/5/3	
3285	14	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 6/4/4	
3175	27	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 10/9/8	Yes
3212	7	Ilex vomitoria	Yaupon holly	Good	Multi stem – 3/3/2	
3213	9	Ilex vomitoria	Yaupon holly	Good	Multi stem – 3/3/3	
3211	9	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4	
3311	11	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/3	
3205	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4	
3312	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4	
3316	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4	
3353	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4/4	
3254	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4/4	
3256	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/3	
3314	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/3	
3315	13	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/3; trunk wounds with no decay	
3214	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/6/3	
3216	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/4	
3252	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/4	
3257	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/3	
3317	14	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/4; trunk wounds with no decay	
3313	15	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/5; trunk wound with no decay	
3210	16	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/5	
2184	8	Ilex x attenuata 'Fosteri'	Foster holly	Good		
3283	8	Ilex x attenuata 'Fosteri'	Foster holly	Fair	Trunk wound with no decay	
3183	10	Ilex x attenuata 'Fosteri'	Foster holly	Good		
3285	10	Ilex x attenuata 'Fosteri'	Foster holly	Good		
3284	13	Ilex x attenuata 'Fosteri'	Foster holly	Good		
3029	9	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 4/3/3	
3028	10	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 4/3/3	
3031	10	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 5/3/3	
3032	10	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 4/3/3	
3030	11	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 4/3/3	
3197	14	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 5/5/4	
3198	14	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 7/4/3	
3199	14	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 5/5/4	
3195	16	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 7/5/4	
3196	18	Ilex x 'Nellie Stevens'	Nellie Stevens holly	Good	Multi stem – 8/5/4	
3285	10	Juniperus virginiana	Eastern red cedar	Poor	Dieback in canopy	
3207	4	Lagerstroemia sp.	Crape myrtle	Poor	Trunk wound with decay	
3304	7	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/2/2	
3305	7	Lagerstroemia sp.	Crape myrtle	Poor	Multi stem – 3/2/2; dieback in trunk	
3209	8	Lagerstroemia sp.	Crape myrtle	Good	Multiple stem – 4/4	Yes
3301	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3302	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3303	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3304	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3180	10	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 4/4/2	Yes
3208	12	Lagerstroemia sp.	Crape myrtle	Poor	Multi stem – 4/4/4; decay in base	Yes
3179	13	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/4/4	Yes
3048	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5	Yes
3000	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5	Yes
3171	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5	Yes
3176	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5	Yes
3177	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5	Yes
3178	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5	Yes
3046	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3001	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3166	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3168	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3169	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3170	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3003	17	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 7/5/5	Yes
3167	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 7/6/5	Yes
3118	5	Liquidambar styraciflua	Sweetgum	Good		
3329	5	Liquidambar styraciflua	Sweetgum	Good		
3330	5	Liquidambar styraciflua	Sweetgum	Good		
3119	7	Liquidambar styraciflua	Sweetgum	Good		
3134	9	Liriodendron tulipifera	Tulip poplar	Good		
3147	11	Liriodendron tulipifera	Tulip poplar	Good		
3138	17	Liriodendron tulipifera	Tulip poplar	Poor	Dieback in codominant leader	
3156	6	Magnolia grandiflora	Southern magnolia	Good	Boundary tree	
3326	6	Magnolia grandiflora	Southern magnolia	Good		
3332	6	Magnolia grandiflora	Southern magnolia	Good		
3333	6	Magnolia grandiflora	Southern magnolia	Good		
3334	6	Magnolia grandiflora	Southern magnolia	Good		
3335	6	Magnolia grandiflora	Southern magnolia	Good		
3127	7	Magnolia grandiflora	Southern magnolia	Good	Boundary tree	
3258	6	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2	
3259	6	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2	
3260	6	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2	
3121	7	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy	
3126	9	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy	
3117	10	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy	
3116	13	Pinus taeda	Loblolly pine	Poor	Fusiform rust canker on trunk	
3130	12	Pinus taeda	Loblolly pine	Good		
3141	12	Pinus taeda	Loblolly pine	Good		
3144	12	Pinus taeda	Loblolly pine	Good		
3133	13	Pinus taeda	Loblolly pine	Good		
3136	13	Pinus taeda	Loblolly pine	Good		
3148	13	Pinus taeda	Loblolly pine	Good		
3135	14	Pinus taeda	Loblolly pine	Good		
3139	14	Pinus taeda	Loblolly pine	Good		
3140	14	Pinus taeda	Loblolly pine	Good		
3143	14	Pinus taeda	Loblolly pine	Good		
3151	14	Pinus taeda	Loblolly pine	Good		
3115	15	Pinus taeda	Loblolly pine	Good		
3132	15	Pinus taeda	Loblolly pine	Good		
3142	15	Pinus taeda	Loblolly pine	Good		
3145	15	Pinus taeda	Loblolly pine	Good		
3146	15	Pinus taeda	Loblolly pine	Good		
3149	15	Pinus taeda	Loblolly pine	Good		
3150	15	Pinus taeda	Loblolly pine	Good		
3139	16	Pinus taeda	Loblolly pine	Good		
3131	16	Pinus taeda	Loblolly pine	Good		
3136	16	Pinus taeda	Loblolly pine	Good		
3122	17	Pinus taeda	Loblolly pine	Poor	Fusiform rust canker on lower trunk	
3150	17	Pinus taeda	Loblolly pine	Good		
3152	20	Pinus taeda	Loblolly pine	Good		
3120	23	Pinus taeda	Loblolly pine	Good		
3027	15	Prunus sp.	Flowering cherry	Poor	Dieback in canopy	Yes
3028	16	Prunus sp.	Flowering cherry	Good		Yes
3153	7	Quercus lyrata	Overcup oak	Good	Boundary tree	
3154	8	Quercus michauxii	Swamp chestnut oak	Good	Boundary tree	
3340	8	Quercus nuttallii	Nuttall oak	Good	Boundary tree	
3164	9	Quercus phellos	Willow oak	Good	Boundary tree	
3326	9	Quercus phellos	Willow oak	Good	Boundary tree	
3158	10	Quercus phellos	Willow oak	Good	Boundary tree	
3036	14	Quercus phellos	Willow oak	Good		
3137	14	Quercus phellos	Willow oak	Good		
3041	15	Quercus phellos	Willow oak	Poor	Dieback in canopy	
3222	15	Quercus phellos	Willow oak	Good		
3006	16	Quercus phellos	Willow oak	Good		
3040	16	Quercus phellos	Willow oak	Good		
3053	18	Quercus phellos	Willow oak	Good		
3225	18	Quercus phellos	Willow oak	Fair	Thin canopy	
3202	19	Quercus phellos	Willow oak	Good		
3034	20	Quercus phellos	Willow oak	Good		
3069	20	Quercus phellos	Willow oak	Good		
3123	20	Quercus phellos	Willow oak	Good		
3124	20	Quercus phellos	Willow oak	Good		
3229	21	Quercus phellos	Willow oak	Good		
3204	23	Quercus phellos	Willow oak	Good		
3238	22	Quercus phellos	Willow oak	Good		
3035	23	Quercus phellos	Willow oak	Good		
3037	23	Quercus phellos	Willow oak	Good		
3038	23	Quercus phellos	Willow oak	Good		
3224	23	Quercus phellos	Willow oak	Good		
3200	24	Quercus phellos	Willow oak	Good		Yes
3201	25	Quercus phellos	Willow oak	Good		Yes
3220	25	Quercus phellos	Willow oak	Good		Yes
3223	25	Quercus phellos	Willow oak	Good		Yes
3080	28	Quercus phellos	Willow oak	Good		Yes
3205	28	Quercus phellos	Willow oak	Good		Yes
3221	27	Quercus phellos	Willow oak	Good		Yes
3127	28	Quercus phellos	Willow oak	Good		Yes
3033	29	Quercus phellos	Willow oak	Good		Yes
3219	29	Quercus phellos	Willow oak	Good		Yes
3038	30	Quercus phellos	Willow oak	Good		Yes
3218	31	Quercus phellos	Willow oak	Good		Yes
3217	32	Quercus phellos	Willow oak	Good		Yes
3210	21	Quercus shumardii	Shumard oak	Good		
3270	21	Quercus shumardii	Shumard oak	Good		
3125	11	Taxodium distichum	Bald cypress	Good	Boundary tree	
3159	6	Ulmus americana	American elm	Good	Boundary tree	
3160	6	Ulmus americana	American elm	Good	Boundary tree	
3161	6	Ulmus americana	American elm	Good	Boundary tree	
3162	6	Ulmus americana	American elm	Good	Boundary tree	
3163	6	Ulmus americana	American elm	Good	Boundary tree	
3047	5	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3238	5	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3239	5	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3240	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; mistletoe on trunk; dieback in canopy	
3241	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3246	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3248	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3075	6	Ulmus parvifolia	Chinese elm	Poor	Invasive species; light dieback in canopy	
3125	6	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3247	6	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3042	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3043	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3044	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback and mistletoe in canopy	
3045	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3067	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3068	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3060	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3205	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3242	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3243	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3244	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3245	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in trunk and canopy	
3248	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3250	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3048	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3207	8	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy	
3068	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3078	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3088	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3087	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3286	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3288	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3289	8	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy	
3300	8	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3308	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3065	10	Ulmus parvifolia	Chinese elm	Poor	Invasive species; damage and dieback in trunk and canopy	
3084	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3091	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3227	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3307	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3309	10	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy	
3077	11	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3311	11	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3085	12	Ulmus parvifolia	Chinese elm	Poor	Invasive species; light dieback in canopy	
3310	13	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy	
3315	13	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3114	8	Zelkova serrata	Zelkova	Good		



VICINITY MAP
not to scale

SITE DATA:

TOTAL SITE AREA _____ 8.7676 ACRES

EXISTING TREE PLAN

BROOKSIDE TOWNHOMES

Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

04/01/2026
SCALE 1" = 50'
JOB #019913084

2 of 2

thePROVIDENCEgroup
Clint Walters
11340 Lakefield Drive
Building II, Suite 200
Johns Creek, Georgia 30097
Tele: (678) 475-1800
Kimley»Horn

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THE PROVIDENCE GROUP
20+ YEARS ELEVATED
LIFESTYLE • LOCATION • LUXURY

City of Alpharetta
2 Park Plaza
Alpharetta, Georgia 30009

February 11, 2026

Re: 3650 Brookside Parkway

Dear Michael,

Please find enclosed updated site plan and tree plan depicting a 10-foot landscape strip and removing new variance requests.

Let us know of anything further that is required. We look forward to working with you on this project and are available for a follow-up meeting at your convenience.

Best regards,



Clint W. Walters
The Providence Group of Georgia, LLC

Cc: wjolly@theprovidencegroup.com
mgreene@portmanholdings.com

PROPERTY DESCRIPTION

Being all that tract or parcel of land lying and being in Land Lots 2, 3 and 44, 1st District, 2nd Section, City of Alpharetta, Fulton County, Georgia and being more particularly described as follows:

COMMENCING at the point of intersection of the southerly right-of-way line of Old Milton Parkway a.k.a. State Route 120 (having an apparent variable width public right-of-way) and the easterly right-of-way line of Brookside Parkway (having an apparent 80' public right-of-way); thence, leaving the aforesaid POINT OF COMMENCEMENT and continuing with the aforesaid right-of-way line of Brookside Parkway South 82° 30' 49" West, 41.86 feet; thence, South 24° 28' 08" West, 114.41 feet; thence, 68.51 feet along the arc of a curve deflecting to the right, having a radius of 852.00 feet and a chord bearing and distance of South 29° 19' 38" West, 68.49 feet; thence, North 65° 32' 15" West, 12.10 feet; thence, 65.49 feet along the arc of a curve deflecting to the right, having a radius of 840.00 feet and a chord bearing and distance of South 33° 58' 02" West, 65.47 feet to a capped rebar (, PBS&J PROP COR,) found and the POINT OF BEGINNING.

Thence, from said POINT OF BEGINNING as thus established and continuing with the aforesaid right-of-way line of Brookside Parkway

1. South 65° 28' 51" East, 398.98 feet to a capped rebar (, PBS&J PROP COR,) found; thence,
2. South 65° 28' 51" East, 62.46 feet to a capped rebar (, PBS&J PROP COR,) found; thence,
3. South 24° 31' 09" West, 52.90 feet to a PK Nail found; thence,
4. South 65° 28' 51" East, 20.04 feet to a PK Nail found; thence,
5. South 24° 31' 09" West, 301.46 feet to a point; thence,
6. South 21° 41' 22" East, 215.45 feet to a PK Nail found; thence,
7. South 13° 28' 59" East, 47.78 feet to a PK Nail found; thence,
8. South 76° 31' 02" West, 149.17 feet to a capped rebar (, PBS&J PROP COR,) found; thence,
9. 960.70 feet along the arc of a curve deflecting to the right and having a radius of 385.00 feet and a chord bearing and distance of North 31° 59' 52" West, 730.15 feet to a 1/2 inch rebar found; thence,
10. North 39° 29' 15" East, 189.68 feet to a 1/2 inch rebar found; thence,
11. 48.19 feet along the arc of a curve deflecting to the left and having a radius of 840.00 feet and a chord bearing and distance of North 37° 50' 38" East, 48.18 feet to the POINT OF BEGINNING, containing 381,916 square feet or 8.7676 acres of land, more or less.

Described property is subject to all rights-of-way (public and private) and easements, both recorded and unrecorded.

SURVEY NOTES

1. ALL BOUNDARY AND TOPOGRAPHIC INFORMATION TAKEN FROM THE SURVEY BY TERRAMARK LAND SURVEY INC, ON 5-21-2025.
2. UNLESS OTHERWISE SPECIFIED, ALL DISTANCES SHOWN ARE HORIZONTAL GROUND DISTANCES.

thePROVIDENCEgroup

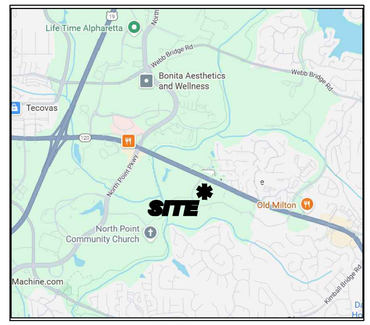
Clint Walters

11340 Lakefield Drive
Building II, Suite 200

Johns Creek, Georgia 30097
Tele: (678) 475-1800

Kimley»Horn





VICINITY MAP
not to scale

SITE DATA:

SITE AREA	8.7676 ACRES
TOTAL POD 'A'	84 ACRES

ZONING

EXISTING ZONING	O-I
PROPOSED ZONING	R-10M
ZONING JURISDICTION	CITY OF ALPHARETTA

DEVELOPMENT TYPE

TOTAL LOTS	104
SITE DENSITY	11.862 U/A
TOTAL DENSITY POD 'A'	6.120 U/A

DEVELOPMENT STANDARDS

FRONT YARD	20' BROOKSIDE PKWY/ 10' LANDSCAPE STRIP
MINIMUM BUILDING SEPARATION	20 FEET
MAXIMUM BUILDING HEIGHT	3 STORIES
MINIMUM LOT WIDTH	18 FEET
MINIMUM LOT SIZE	NONE
MAXIMUM DENSITY	10 U/A

PARKING

GARAGE	208
DRIVEWAY	208
GUEST SPACES	24
TOTAL	440

AMENITY SPACE

POCKET PARK #1	4,000 SF
POCKET PARK #2	9,600 SF
POCKET PARK #3	12,000 SF
COMMUNITY POOL	8,800 SF
TOTAL	34,400 SF 0.79 AC (9%)

NOTES

1. SPEED LIMIT OF OLD BROOKSIDE PARKWAY IS 35 MPH.
2. ACCORDING TO THE U.S. FISH AND WILDLIFE SERVICE NATIONAL WETLANDS INVENTORY - WETLANDS ARE NOT LOCATED ON THIS SITE.
3. ACCORDING TO THE FEMA FLOOD INSURANCE RATE MAP FOR FULTON COUNTY 13121C0078F and 13121C0086F, EFFECTIVE DATE 9/18/2013. THE PROPERTY DOES NOT FALL WITHIN A DESIGNATED FLOOD ZONE "A" (AREAS OF 100 YEAR FLOOD) .
4. WATERS OF THE STATE ARE WITHIN 200' OF THIS PROPERTY.
5. THE CHATTAHOOCHEE RIVER IS NOT WITHIN 2000' OF THIS PROPERTY.
6. ALPHARETTA FIRE DEPARTMENT SHALL APPROVE ROAD LAYOUT AND ENTRANCES.
7. WATER SERVICE SHALL BE PROVIDED BY FULTON COUNTY. EXISTING WATER SERVICE WILL BE USED
8. SANITARY SEWER SERVICE WILL BE PROVIDED BY FULTON COUNTY. EXISTING SEWER WILL BE TAPPED ON SITE.
9. THE PROPOSED DEVELOPMENT MAY BE GATED AND HAVE PRIVATE STREETS.
10. SPECIMEN TREE LOCATIONS TAKEN FROM TREE STUDY PERFORMED BY BROOKWOOD TREE CONSULTANTS.
11. THE 10 FOOT PRIVATE STREET LANDSCAPE STRIP IS MEASURED FROM EDGE OF SIDEWALK NEAREST THE STREET. SIDEWALK AND UTILITIES ARE TO BE ALLOWED TO ENCROACH 5 FEET INTO THE LANDSCAPE STRIP.

VARIANCES

1. ALPHARETTA UDC § 2.2.10.D TO ALLOW A 20-FOOT SETBACK ALONG BROOKSIDE PARKWAY PURSUANT TO THE SMALL AREA PLAN.
2. ALPHARETTA UDC § 3.2.8.B.1.A TO REDUCE THE 50-FOOT UNDISTURBED BUFFER TO A 15-FOOT PLANTED BUFFER.
3. ALPHARETTA UDC § 2.2.10.D TO REDUCE THE INDIVIDUAL LOT WIDTH MINIMUM FROM 20-FEET TO 18-FEET.

ZONING PLAN

BROOKSIDE WEST

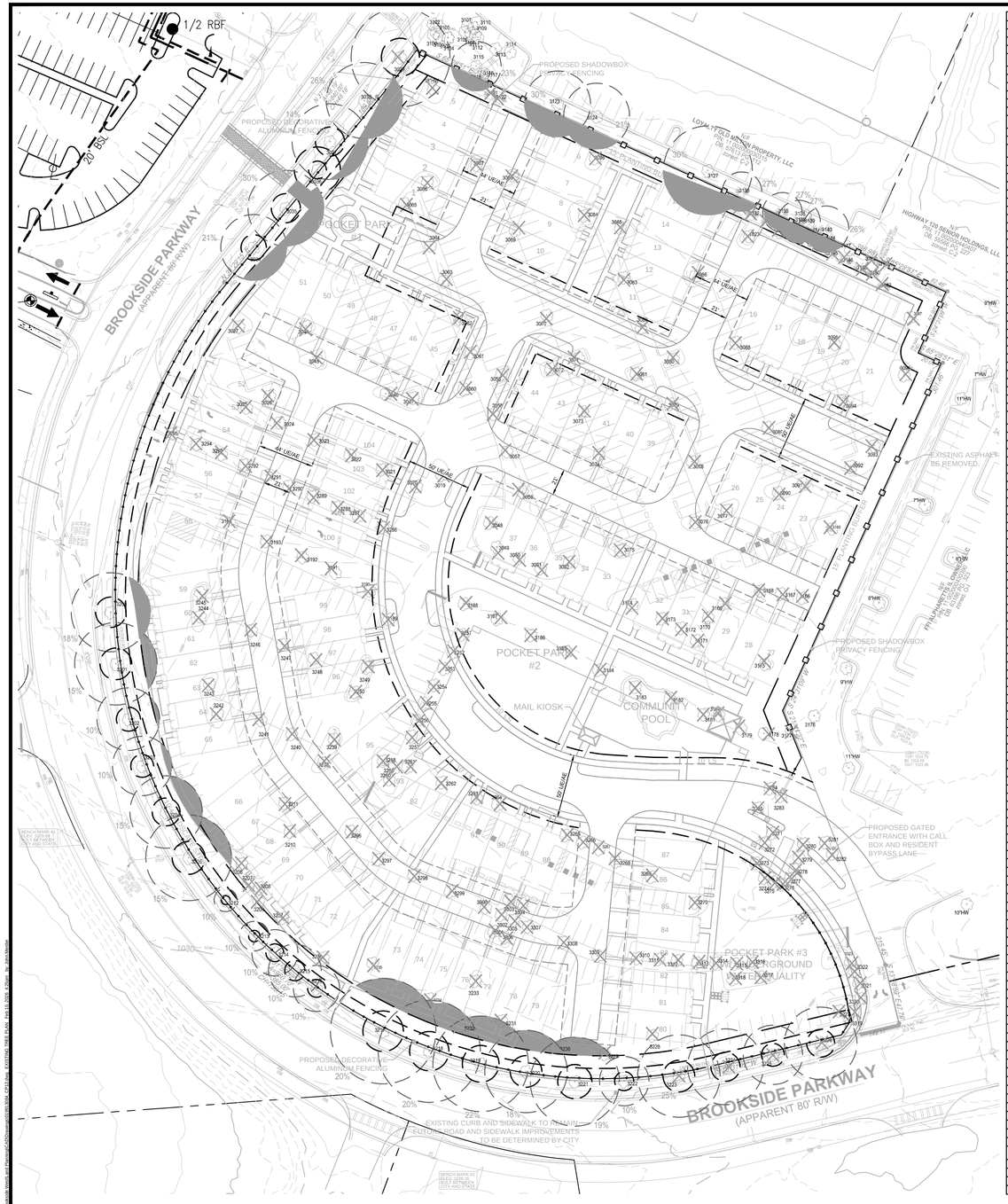
GEORGIA REGISTERED LANDSCAPE ARCHITECT EDWARD J. ANDERSON No. 001173

Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

02/10/2026
SCALE 1" = 40'
JOB #019913084

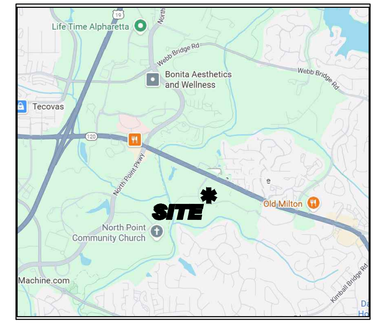
1 of 2

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3650 Brookside Parkway Tree Assessment

Tag Number	DBH	Species	Common Name	Condition	Notes	Specimen
3106	6	Acer buergerianum	Trident maple	Fair	Suppressed canopy	
3089	6	Acer rubrum	Red maple	Poor	Dieback in trunk and canopy	
3073	6	Acer rubrum	Red maple	Poor	Trunk wound with decay	
3074	6	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy	
3088	6	Acer rubrum	Red maple	Fair	Light dieback in canopy	
3328	6	Acer rubrum	Red maple	Good	Boundary tree	
3336	6	Acer rubrum	Red maple	Good	Boundary tree	
3070	7	Acer rubrum	Red maple	Poor	Decay in trunk; dieback in canopy	
3071	7	Acer rubrum	Red maple	Fair	Light dieback in canopy	
3072	7	Acer rubrum	Red maple	Good		
3069	7	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy	
3337	7	Acer rubrum	Red maple	Good	Boundary tree	
3339	8	Acer rubrum	Red maple	Good	Boundary tree	
3094	9	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy	
3081	10	Acer rubrum	Red maple	Poor	Dieback in canopy	
3080	11	Acer rubrum	Red maple	Poor	Dieback in canopy	
3228	11	Acer rubrum	Red maple	Good		
3082	12	Acer rubrum	Red maple	Good		
3083	12	Acer rubrum	Red maple	Good		
3021	13	Acer rubrum	Red maple	Good		
3059	13	Acer rubrum	Red maple	Good		
3081	13	Acer rubrum	Red maple	Good		
3083	13	Acer rubrum	Red maple	Good		
3079	13	Acer rubrum	Red maple	Good		
3082	13	Acer rubrum	Red maple	Good		
3172	13	Acer rubrum	Red maple	Good		
3085	13	Acer rubrum	Red maple	Good		
3109	13	Acer rubrum	Red maple	Good		
3019	14	Acer rubrum	Red maple	Good		
3020	14	Acer rubrum	Red maple	Good		
3023	14	Acer rubrum	Red maple	Good		
3057	14	Acer rubrum	Red maple	Good		
3058	14	Acer rubrum	Red maple	Good		
3064	14	Acer rubrum	Red maple	Good		
3063	14	Acer rubrum	Red maple	Fair	Light decay in pruning wound	
3078	15	Acer rubrum	Red maple	Good		
3083	15	Acer rubrum	Red maple	Good		
3181	15	Acer rubrum	Red maple	Good		
3182	15	Acer rubrum	Red maple	Good		
3185	15	Acer rubrum	Red maple	Good		
3187	15	Acer rubrum	Red maple	Good		
3190	15	Acer rubrum	Red maple	Good		
3230	15	Acer rubrum	Red maple	Good		
3231	15	Acer rubrum	Red maple	Good		
3232	15	Acer rubrum	Red maple	Good		
3088	15	Acer rubrum	Red maple	Poor	Trunk wounds with fungal fruiting bodies and decay	
3089	15	Acer rubrum	Red maple	Poor	Trunk wounds and dieback in trunk	
3188	16	Acer rubrum	Red maple	Good		
3191	16	Acer rubrum	Red maple	Good		
3192	16	Acer rubrum	Red maple	Good		
3194	16	Acer rubrum	Red maple	Good		
3281	16	Acer rubrum	Red maple	Good		
3282	16	Acer rubrum	Red maple	Good		
3193	17	Acer rubrum	Red maple	Good		
3233	17	Acer rubrum	Red maple	Fair	Light decay in pruning wound	
3024	18	Acer rubrum	Red maple	Good		
3206	18	Acer rubrum	Red maple	Good		
3234	18	Acer rubrum	Red maple	Good		
3066	19	Acer rubrum	Red maple	Good		
3235	20	Acer rubrum	Red maple	Good		
3236	20	Acer rubrum	Red maple	Good		
3237	20	Acer rubrum	Red maple	Good		
3025	22	Acer rubrum	Red maple	Good		
2173	7	Acer saccharum	Sugar maple	Good		
3097	8	Acer saccharum	Sugar maple	Good		
3063	9	Acer saccharum	Sugar maple	Good		
3096	9	Acer saccharum	Sugar maple	Good		
3092	10	Acer saccharum	Sugar maple	Good		
3174	11	Acer saccharum	Sugar maple	Good		
2165	14	Acer saccharum	Sugar maple	Good		
3324	6	Cryptomeria japonica	Cryptomeria	Good		
3328	6	Cryptomeria japonica	Cryptomeria	Good		
3327	8	Cryptomeria japonica	Cryptomeria	Good		
3103	8	Cryptomeria japonica	Cryptomeria	Good		
3104	8	Cryptomeria japonica	Cryptomeria	Good		
3108	8	Cryptomeria japonica	Cryptomeria	Good		
3110	8	Cryptomeria japonica	Cryptomeria	Good		
3325	8	Cryptomeria japonica	Cryptomeria	Good		
3106	9	Cryptomeria japonica	Cryptomeria	Good		
3107	9	Cryptomeria japonica	Cryptomeria	Good		
3111	9	Cryptomeria japonica	Cryptomeria	Good		
3101	10	Cryptomeria japonica	Cryptomeria	Good		
3112	10	Cryptomeria japonica	Cryptomeria	Good		
3100	11	Cryptomeria japonica	Cryptomeria	Good		
3102	11	Cryptomeria japonica	Cryptomeria	Good		
3105	11	Cryptomeria japonica	Cryptomeria	Good		
3113	11	Cryptomeria japonica	Cryptomeria	Good		
3272	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3281	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3282	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3275	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3276	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3279	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3280	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3271	14	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3277	14	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3274	15	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3278	16	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3273	17	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species	
3066	10	Ilex 'Emily Brunner'	Emily Brunner Holly	Good		
3063	13	Ilex 'Emily Brunner'	Emily Brunner Holly	Fair	Chlorotic foliage	
3064	14	Ilex 'Emily Brunner'	Emily Brunner Holly	Good		
3320	8	Ilex cornuta Burfordii	Burford holly	Fair	Multi stem – 4/2/2; light dieback	
3321	8	Ilex cornuta Burfordii	Burford holly	Poor	Multi stem – 4/2/2; dieback	
3288	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3291	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3292	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3322	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3323	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3286	11	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/3/3	
3284	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3	
3289	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3287	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3299	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3290	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3283	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4	
3318	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/4/3	
3287	13	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 6/5/3	
3284	13	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/5/3	
3285	14	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 6/4/4	
3175	27	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 10/9/8	Yes
3212	7	Ilex vomitoria	Yaupon holly	Good	Multi stem – 3/3/2	
3213	9	Ilex vomitoria	Yaupon holly	Good	Multi stem – 3/3/3	
3211	9	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4	
3285	11	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/3	
3209	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4	
3312	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4	
3318	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4	
3353	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4/4	
3284	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4/4	
3286	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/3	
3314	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/3	
3315	13	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/3; trunk wounds with no decay	
3214	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/3	
3216	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/4	
3352	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/4	
3287	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/3	
3317	14	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/4; trunk wounds with no decay	
3313	15	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/5; trunk wound with no decay	
3210	16	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/5	
3184	8	Ilex x attenuata 'Fastert	Fastar holly	Good		
3283	8	Ilex x attenuata 'Fastert	Fastar holly	Fair	Trunk wound with no decay	
3183	10	Ilex x attenuata 'Fastert	Fastar holly	Good		
3285	10	Ilex x attenuata 'Fastert	Fastar holly	Good		
3284	13	Ilex x attenuata 'Fastert	Fastar holly	Good		
3029	9	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/3/3	
3028	10	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/3/3	
3031	10	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 5/3/3	
3032	10	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/3/3	
3030	11	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/4/3	
3197	14	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 5/5/4	
3198	14	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 7/4/3	
3199	14	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 5/5/4	
3195	16	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 7/5/4	
3196	18	Ilex x 'Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 8/5/4	
3285	10	Juniperus virginiana	Eastern red cedar	Poor	Dieback in canopy	
3207	4	Lagerstroemia sp.	Crape myrtle	Poor	Trunk wound with decay	
3304	7	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/2/2	
3305	7	Lagerstroemia sp.	Crape myrtle	Poor	Multi stem – 3/2/2; dieback in trunk	
3209	8	Lagerstroemia sp.	Crape myrtle	Good	Multiple stem – 4/4	Yes
3301	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3302	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3303	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3306	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2	Yes
3180	10	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 4/4/2	Yes
3208	12	Lagerstroemia sp.	Crape myrtle	Poor	Multi stem – 4/4/4; decay in base	Yes
3179	13	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/4/4	Yes
3048	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/3	Yes
3000	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/3	Yes
3171	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/3	Yes
3176	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/3	Yes
3177	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/3	Yes
3178	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/3	Yes
3046	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/3	Yes
3001	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3166	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3188	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3189	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3170	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5	Yes
3003	17	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 7/5/5	Yes
3167	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 7/5/5	Yes
3118	5	Liquidambar styraciflua	Sweetgum	Good		
3329	5	Liquidambar styraciflua	Sweetgum	Good		
3330	5	Liquidambar styraciflua	Sweetgum	Good		
3119	7	Liquidambar styraciflua	Sweetgum	Good		
3134	9	Liriodendron tulipifera	Tulip poplar	Good		
3147	11	Liriodendron tulipifera	Tulip poplar	Good		
3138	17	Liriodendron tulipifera	Tulip poplar	Poor	Dieback in codominant leader	
3156	6	Magnolia grandiflora	Southern magnolia	Good	Boundary tree	
3326	6	Magnolia grandiflora	Southern magnolia	Good		
3332	6	Magnolia grandiflora	Southern magnolia	Good		
3333	6	Magnolia grandiflora	Southern magnolia	Good		
3334	8	Magnolia grandiflora	Southern magnolia	Good		
3335	6	Magnolia grandiflora	Southern magnolia	Good		
3127	7	Magnolia grandiflora	Southern magnolia	Good	Boundary tree	
3258	8	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2	
3259	6	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2	
3260	8	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2	
3121	7	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy	
3126	9	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy	
3117	10	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy	
3118	13	Pinus taeda	Loblolly pine	Poor	Fusiform rust canker on trunk	
3130	12	Pinus taeda	Loblolly pine	Good		
3141	12	Pinus taeda	Loblolly pine	Good		
3144	13	Pinus taeda	Loblolly pine	Good		
3133	13	Pinus taeda	Loblolly pine	Good		
3138	13	Pinus taeda	Loblolly pine	Good		
3148	13	Pinus taeda	Loblolly pine	Good		
3135	14	Pinus taeda	Loblolly pine	Good		
3139	14	Pinus taeda	Loblolly pine	Good		
3140	14	Pinus taeda	Loblolly pine	Good		
3143	14	Pinus taeda	Loblolly pine	Good		
3151	14	Pinus taeda	Loblolly pine	Good		
3115	15	Pinus taeda	Loblolly pine	Good		
3132	15	Pinus taeda	Loblolly pine	Good		
3142	15	Pinus taeda	Loblolly pine	Good		
3145	15	Pinus taeda	Loblolly pine	Good		
3146	15	Pinus taeda	Loblolly pine	Good		
3149	15	Pinus taeda	Loblolly pine	Good		
3139	16	Pinus taeda	Loblolly pine	Good		
3131	16	Pinus taeda	Loblolly pine	Good		
3136	16	Pinus taeda	Loblolly pine	Good		
3122	17	Pinus taeda	Loblolly pine	Poor	Fusiform rust canker on lower trunk	
3150	17	Pinus taeda	Loblolly pine	Good		
3152	20	Pinus taeda	Loblolly pine	Good		
3120	23	Pinus taeda	Loblolly pine	Good		
3027	15	Prunus sp.	Flowering cherry	Poor	Dieback in canopy	Yes
3028	16	Prunus sp.	Flowering cherry	Good		Yes
3153	7	Quercus lyrata	Overcup oak	Good	Boundary tree	
3154	8	Quercus michauxii	Swamp chestnut oak	Good	Boundary tree	
3340	8	Quercus nuttallii	Nuttall oak	Good	Boundary tree	
3164	9	Quercus phellos	Willow oak	Good	Boundary tree	
3326	9	Quercus phellos	Willow oak	Good	Boundary tree	
3158	10	Quercus phellos	Willow oak	Good	Boundary tree	
3036	14	Quercus phellos	Willow oak	Good		
3137	14	Quercus phellos	Willow oak	Good		
3041	15	Quercus phellos	Willow oak	Poor	Dieback in canopy	
3222	15	Quercus phellos	Willow oak	Good		
3006	16	Quercus phellos	Willow oak	Good		
3040	16	Quercus phellos	Willow oak	Good		
3053	18	Quercus phellos	Willow oak	Good		
3225	18	Quercus phellos	Willow oak	Fair	Thin canopy	
3202	19	Quercus phellos	Willow oak	Good		
3034	20	Quercus phellos	Willow oak	Good		
3069	20	Quercus phellos	Willow oak	Good		
3123	20	Quercus phellos	Willow oak	Good		
3124	20	Quercus phellos	Willow oak	Good		
3229	21	Quercus phellos	Willow oak	Good		
3204	23	Quercus phellos	Willow oak	Good		
3228	22	Quercus phellos	Willow oak	Good		
3035	23	Quercus phellos	Willow oak	Good		
3037	23	Quercus phellos	Willow oak	Good		
3038	23	Quercus phellos	Willow oak	Good		
3224	23	Quercus phellos	Willow oak	Good		
3200	24	Quercus phellos	Willow oak	Good		Yes
3201	25	Quercus phellos	Willow oak	Good		Yes
3220	25	Quercus phellos	Willow oak	Good		Yes
3223	25	Quercus phellos	Willow oak	Good		Yes
3060	28	Quercus phellos	Willow oak	Good		Yes
3205	28	Quercus phellos	Willow oak	Good		Yes
3221	27	Quercus phellos	Willow oak	Good		Yes
3137	28	Quercus phellos	Willow oak	Good		Yes
3033	29	Quercus phellos	Willow oak	Good		Yes
3219	29	Quercus phellos	Willow oak	Good		Yes
3039	30	Quercus phellos	Willow oak	Good		Yes
3218	31	Quercus phellos	Willow oak	Good		Yes
3217	32	Quercus phellos	Willow oak	Good		Yes
3210	21	Quercus shumardii	Shumard oak	Good		
3270	21	Quercus shumardii	Shumard oak	Good		
3135	11	Taxodium distichum	Bald cypress	Good	Boundary tree	
3159	6	Ulmus americana	American elm	Good	Boundary tree	
3160	6	Ulmus americana	American elm	Good	Boundary tree	
3161	6	Ulmus americana	American elm	Good	Boundary tree	
3162	6	Ulmus americana	American elm	Good	Boundary tree	
3163	6	Ulmus americana	American elm	Good	Boundary tree	
3047	5	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3238	5	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3239	5	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3240	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; mistletoe on trunk; dieback in canopy	
3241	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3248	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3249	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3075	6	Ulmus parvifolia	Chinese elm	Good	Invasive species; light dieback in canopy	
3125	6	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3247	6	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3042	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3043	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3044	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback and mistletoe in canopy	
3045	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3067	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3068	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3060	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3205	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3242	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3243	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3244	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3245	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in trunk and canopy	
3246	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3250	7	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3048	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3207	8	Ulmus parvifolia	Chinese elm	Poor	Invasive species; light dieback in canopy	
3068	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3076	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3088	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3087	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3298	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3299	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3289	8	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy	
3300	8	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy	
3308	8	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3065	10	Ulmus parvifolia	Chinese elm	Poor	Invasive species; damage and dieback in trunk and canopy	
3084	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3061	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3227	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3307	10	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3309	10	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy	
3077	11	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3311	11	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3085	12	Ulmus parvifolia	Chinese elm	Poor	Invasive species; light dieback in canopy	
3310	13	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy	
3315	13	Ulmus parvifolia	Chinese elm	Good	Invasive species	
3114	8	Zelkova serrata	Zelkova	Good		



VICINITY MAP
not to scale

SITE DATA:

TOTAL SITE AREA _____ 8.7676 ACRES

SPECIMEN TREE RECOMPENSE NOTES:

SEVEN SPECIMEN TREES WILL BE REMOVED DURING CONSTRUCTION FOR A TOTAL OF 168 X 3 = 504 INCHES REQUIRED FOR RECOMPENSE

OVERALL TREE DENSITY CALCULATION:

SITE DENSITY FACTOR (SDF) = 130" x (SITE AREA - BUFFER AREA)
SITE AREA = 8.7676 AC
BUFFER AREA = 0.0.2982 AC (15' PERIMETER BUFFER)
SDF = (8.7676 AC - 0.2982 AC) x 130" = 1,101"

EXISTING NON-SPECIMEN TREES TO BE SAVED = 237"
EXISTING SPECIMEN TREES TO BE SAVED = 219" X 2 = 438"
1,101 - (237 + 438) = 426 INCHES REQUIRED FOR DENSITY

VARIANCES

1. ALPHARETTA UDC § 2.2.10.D TO ALLOW A 20-FOOT SETBACK ALONG BROOKSIDE PARKWAY PURSUANT TO THE SMALL AREA PLAN.
2. ALPHARETTA UDC § 3.2.8.B.1.A TO REDUCE THE 50-FOOT UNDISTURBED BUFFER TO A 15-FOOT PLANTED BUFFER.
3. ALPHARETTA UDC § 2.2.10.D TO REDUCE THE INDIVIDUAL LOT WIDTH MINIMUM FROM 20-FEET TO 18-FEET.

NORTH

0 25 50 100
SCALE IN FEET

EXISTING TREE PLAN

BROOKSIDE WEST

Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

02/10/2026
SCALE 1" = 50'
JOB #019913084

2 of 2

thePROVIDENCEgroup
Clint Walters
11340 Lakefield Drive
Building II, Suite 200
Johns Creek, Georgia 30097
Tele: (678) 475-1800
Kimley»Horn

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PROPERTY DESCRIPTION

Being all that tract or parcel of land lying and being in Land Lots 2, 3 and 44, 1st District, 2nd Section, City of Alpharetta, Fulton County, Georgia and being more particularly described as follows:

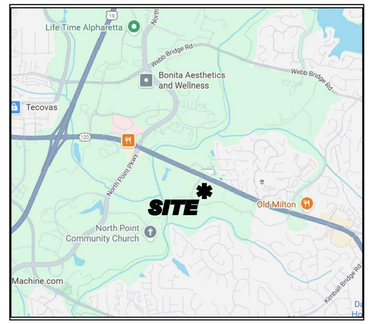
COMMENCING at the point of intersection of the southerly right-of-way line of Old Milton Parkway a.k.a. State Route 120 (having an apparent variable width public right-of-way) and the easterly right-of-way line of Brookside Parkway (having an apparent 80' public right-of-way); thence, leaving the aforesaid POINT OF COMMENCEMENT and continuing with the aforesaid right-of-way line of Brookside Parkway South 82° 30' 49" West, 41.86 feet; thence, South 24° 28' 08" West, 114.41 feet; thence, 68.51 feet along the arc of a curve deflecting to the right, having a radius of 852.00 feet and a chord bearing and distance of South 29° 19' 38" West, 68.49 feet; thence, North 65° 32' 15" West, 12.10 feet; thence, 65.49 feet along the arc of a curve deflecting to the right, having a radius of 840.00 feet and a chord bearing and distance of South 33° 58' 02" West, 65.47 feet to a capped rebar ("PBS&J PROP COR") found and the POINT OF BEGINNING.

Thence, from said POINT OF BEGINNING as thus established and continuing with the aforesaid right-of-way line of Brookside Parkway

1. South 65° 28' 51" East, 398.98 feet to a capped rebar ("PBS&J PROP COR") found; thence,
2. South 65° 28' 51" East, 62.46 feet to a capped rebar ("PBS&J PROP COR") found; thence,
3. South 24° 31' 09" West, 52.90 feet to a PK Nail found; thence,
4. South 65° 28' 51" East, 20.04 feet to a PK Nail found; thence,
5. South 24° 31' 09" West, 301.46 feet to a point; thence,
6. South 21° 41' 22" East, 215.45 feet to a PK Nail found; thence,
7. South 13° 28' 59" East, 47.78 feet to a PK Nail found; thence,
8. South 76° 31' 02" West, 149.17 feet to a capped rebar ("PBS&J PROP COR") found; thence,
9. 960.70 feet along the arc of a curve deflecting to the right and having a radius of 385.00 feet and a chord bearing and distance of North 31° 59' 52" West, 730.15 feet to a 1/2 inch rebar found; thence,
10. North 39° 29' 15" East, 189.68 feet to a 1/2 inch rebar found; thence,
11. 48.19 feet along the arc of a curve deflecting to the left and having a radius of 840.00 feet and a chord bearing and distance of North 37° 50' 38" East, 48.18 feet to the POINT OF BEGINNING, containing 381,916 square feet or 8.7676 acres of land, more or less.

Described property is subject to all rights-of-way (public and private) and easements, both recorded and unrecorded.





VICINITY MAP
not to scale

SITE DATA:

SITE AREA	8.7676 ACRES
TOTAL POD 'A'	84 ACRES

ZONING

EXISTING ZONING	O-I
PROPOSED ZONING	R-10M
ZONING JURISDICTION	CITY OF ALPHARETTA

DEVELOPMENT TYPE

TOTAL LOTS	104
SITE DENSITY	11.862 U/A
TOTAL DENSITY POD 'A'	6.120 U/A

DEVELOPMENT STANDARDS

FRONT YARD	20' BROOKSIDE PKWY/ 10' LANDSCAPE STRIP
MINIMUM BUILDING SEPARATION	20 FEET
MAXIMUM BUILDING HEIGHT	3 STORIES
MINIMUM LOT WIDTH	18 FEET
MINIMUM LOT SIZE	NONE
MAXIMUM DENSITY	10 U/A

PARKING

GARAGE	208
DRIVEWAY	208
GUEST SPACES	24
TOTAL	440

AMENITY SPACE

POCKET PARK #1	4,000 SF
POCKET PARK #2	9,600 SF
POCKET PARK #3	12,000 SF
COMMUNITY POOL	8,800 SF
TOTAL	34,400 SF
	0.79 AC (9%)

NOTES

1. SPEED LIMIT OF OLD BROOKSIDE PARKWAY IS 35 MPH.
2. ACCORDING TO THE U.S. FISH AND WILDLIFE SERVICE NATIONAL WETLANDS INVENTORY - WETLANDS ARE NOT LOCATED ON THIS SITE.
3. ACCORDING TO THE FEMA FLOOD INSURANCE RATE MAP FOR FULTON COUNTY 13121C0078F and 13121C0086F, EFFECTIVE DATE 9/18/2013. THE PROPERTY DOES NOT FALL WITHIN A DESIGNATED FLOOD ZONE "A" (AREAS OF 100 YEAR FLOOD).
4. WATERS OF THE STATE ARE WITHIN 200' OF THIS PROPERTY.
5. THE CHATTAHOOCHEE RIVER IS NOT WITHIN 2000' OF THIS PROPERTY.
6. ALPHARETTA FIRE DEPARTMENT SHALL APPROVE ROAD LAYOUT AND ENTRANCES.
7. WATER SERVICE SHALL BE PROVIDED BY FULTON COUNTY. EXISTING WATER SERVICE WILL BE USED
8. SANITARY SEWER SERVICE WILL BE PROVIDED BY FULTON COUNTY. EXISTING SEWER WILL BE TAPPED ON SITE.
9. THE PROPOSED DEVELOPMENT MAY BE GATED AND HAVE PRIVATE STREETS.
10. SPECIMEN TREE LOCATIONS TAKEN FROM TREE STUDY PERFORMED BY BROOKWOOD TREE CONSULTANTS.

VARIANCES

1. ALPHARETTA UDC § 2.2.10.D TO ALLOW A 20-FOOT SETBACK ALONG BROOKSIDE PARKWAY PURSUANT TO THE SMALL AREA PLAN.
2. ALPHARETTA UDC § 3.2.8.B.1.A TO REDUCE THE 50-FOOT UNDISTURBED BUFFER TO A 15-FOOT PLANTED BUFFER.
3. ALPHARETTA UDC § 2.2.10.D TO REDUCE THE INDIVIDUAL LOT WIDTH MINIMUM FROM 20-FEET TO 18-FEET.
4. ALPHARETTA UDC § 3.2.2 TO EXCLUDE THE EXISTING CRAPE MYRTLES ON THE SITE FROM SPECIMEN TREE STATUS.
5. ALPHARETTA UDC § 3.2.8.D.1 TO REDUCE THE INTERNAL STREET LANDSCAPE STRIP FROM 10 FEET TO 5 FEET.
6. ALPHARETTA UDC § 3.2.6.A.3.a TO INCREASE THE ALLOWED DISTURBANCE OF THE CRITICAL ROOT ZONE (CRZ) FROM 20 PERCENT TO 30 PERCENT.
7. ALPHARETTA UDC § 3.2.8.C.6 TO REDUCE THE REQUIRED PERCENTAGE OF PROPOSED OVER STORY TREES FROM 40 PERCENT TO 30 PERCENT.

SURVEY NOTES

1. ALL BOUNDARY AND TOPOGRAPHIC INFORMATION TAKEN FROM THE SURVEY BY TERRAMARK LAND SURVEY INC, ON 5-21-2025.
2. UNLESS OTHERWISE SPECIFIED, ALL DISTANCES SHOWN ARE HORIZONTAL GROUND DISTANCES.

ZONING PLAN

BROOKSIDE WEST

Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

02/09/2026
SCALE 1" = 40'
JOB #019913084

GEORGIA REGISTERED LANDSCAPE ARCHITECT EDWARD J. ANDERSON

b+c STUDIO

thePROVIDENCEgroup
Clint Walters
11340 Lakefield Drive
Building II, Suite 200
Johns Creek, Georgia 30097
Tele: (678) 475-1800

Kimley»Horn

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PROPERTY DESCRIPTION

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COMMENCING at the point of intersection of the southerly right-of-way line of Old Milton Parkway a.k.a. State Route 120 (having an apparent variable width public right-of-way) and the easterly right-of-way line of Brookside Parkway (having an apparent 80' public right-of-way); thence, leaving the aforesaid POINT OF COMMENCEMENT and continuing with the aforesaid right-of-way line of Brookside Parkway South 82° 30' 49" West, 41.86 feet; thence, South 24° 28' 08" West, 114.41 feet; thence, 68.51 feet along the arc of a curve deflecting to the right, having a radius of 852.00 feet and a chord bearing and distance of South 29° 19' 38" West, 68.49 feet; thence, North 65° 32' 15" West, 12.10 feet; thence, 65.49 feet along the arc of a curve deflecting to the right, having a radius of 840.00 feet and a chord bearing and distance of South 33° 58' 02" West, 65.47 feet to a capped rebar (, PBS&J PROP COR,) found and the POINT OF BEGINNING.

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Described property is subject to all rights-of-way (public and private) and easements, both recorded and unrecorded.

22's - 36
20's - 26
18's - 42

Total - 104

SURVEY NOTES

1. ALL BOUNDARY AND TOPOGRAPHIC INFORMATION TAKEN FROM THE SURVEY BY TERRAMARK LAND SURVEY INC, ON 5-21-2025.
2. UNLESS OTHERWISE SPECIFIED, ALL DISTANCES SHOWN ARE HORIZONTAL GROUND DISTANCES.

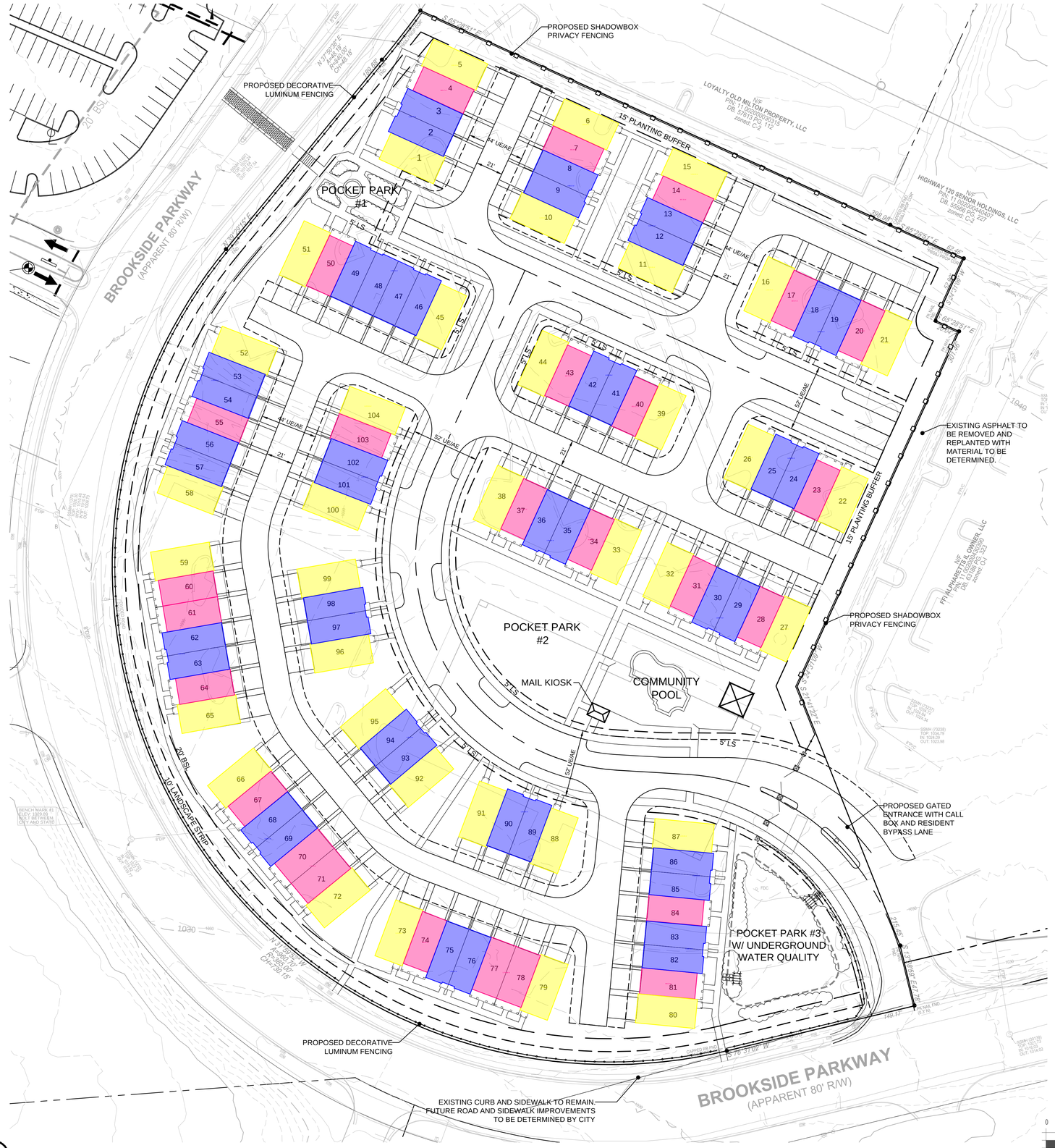
thePROVIDENCEgroup

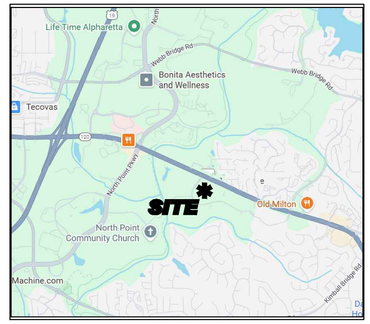
Clint Walters

11340 Lakefield Drive
Building II, Suite 200

Johns Creek, Georgia 30097
Tele: (678) 475-1800

Kimley»Horn





VICINITY MAP
not to scale

ZONING PLAN

BROOKSIDE WEST

Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

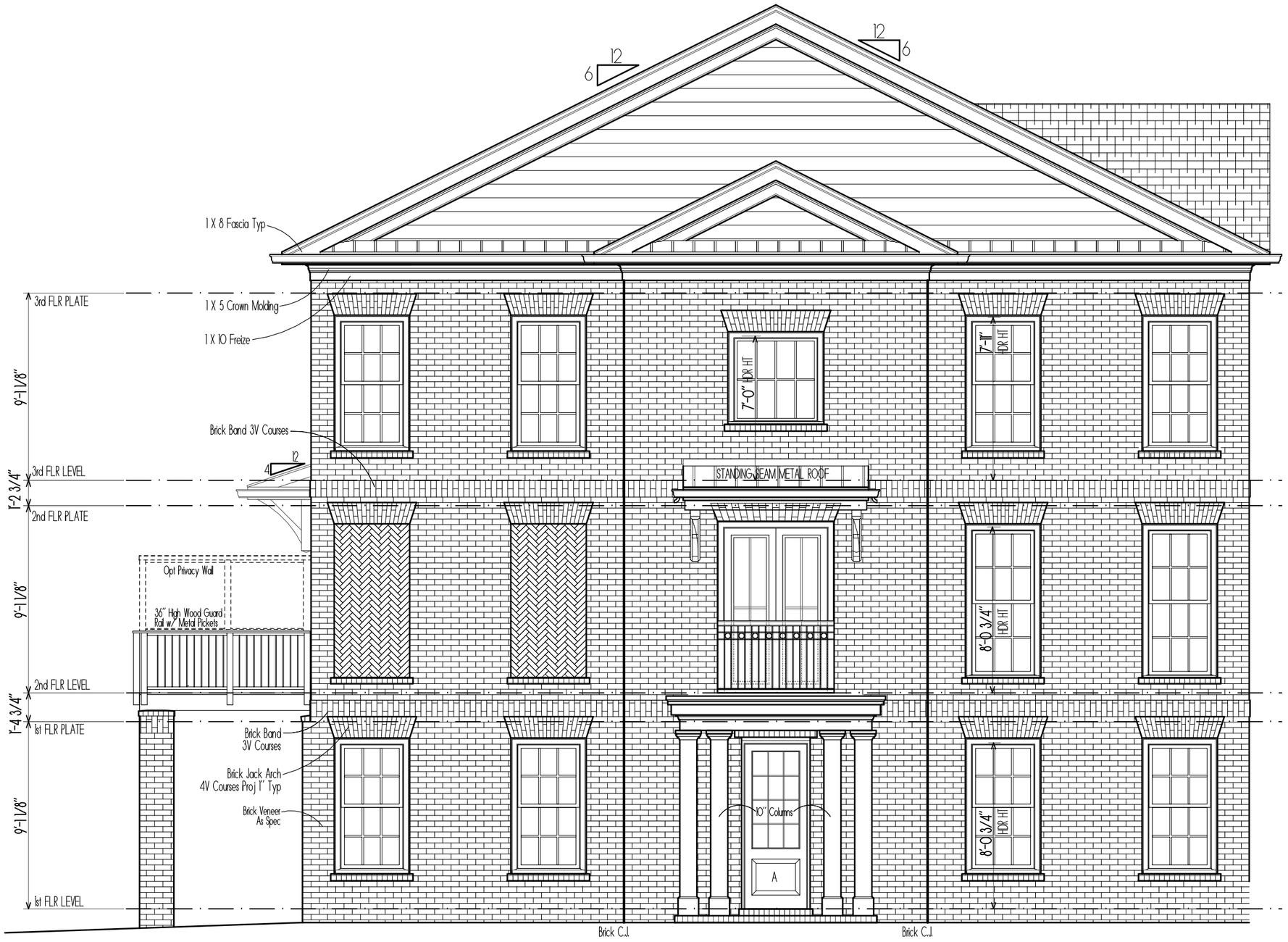
02/05/2026
SCALE 1" = 40'
JOB #019913084

1 of 2

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12
6
12
6
1 X 8 Fascia Typ
1 X 5 Crown Molding
1 X 10 Freize
3rd FLR PLATE
9'-11 1/8"
Brick Band 3V Courses
12
4
3rd FLR LEVEL
1'-2 3/4"
2nd FLR PLATE
STANDING SEAM METAL ROOF
7'-0" HDR HT
7'-11" HDR HT
Opt Privacy Wall
36" High Wood Guard Rail w/ Metal Pickets
9'-11 1/8"
8'-0 3/4" HDR HT
2nd FLR LEVEL
1'-4 3/4"
1st FLR PLATE
Brick Band 3V Courses
Brick Jack Arch 4V Courses Proj 1" Typ
Brick Veneer As Spec
10" Columns
A
9'-11 1/8"
8'-0 3/4" HDR HT
1st FLR LEVEL
Brick C.J
Brick C.J

FENCE EXAMPLES

Decorative Aluminum Fence



Shadowbox Privacy Fence



Community Zoning Information Meeting (CZIM) January 14, 2026

Please sign-in and leave your comments and/or concerns.

MP-26-03/CLUP-26-01/Z-26-01/V-26-02 / TPG Brookside West

NAME	ADDRESS	COMMENTS

No Comments

CITIZEN PARTICIPATION FORM - PART B

This form must be completed and submitted to the City's Community Development Department a minimum of twenty (20) business days prior to the first scheduled Public Hearing.

Public Hearing or Project Name: MP-26-03/CLUP-26-01/Z-26-01/V-26-02 TPG Brookside West

Contact Name: Alex Brock (Smith, Gambrell, and Russell, LLP) Telephone: 404-815-3603

Please describe comments and concerns provided by any and all individuals contacted as part of the the Citizen Participation Program. If any individuals provided written correspondence, please attach copies of same to this report.

Letters were sent to the property owners noted on the attached list. No feedback has been received to-date. The Applicant also attended the Community Zoning Information Meeting (CZIM) on January 14,2026.

There was one member of the public that reviewed our presentation at the CZIM, but did not sign in. She asked about the public hearing dates and expressed general support.

Method by which these individuals were contacted. Please mark all that apply. *Please provide samples of any and all written communications used to provide notification.*

- [x] Letter
- [ ] Personal Visits
- [ ] Telephone
- [ ] Group Meeting
- [ ] Email
- [ ] Other *(Please Specify)* _____

Attach a list of people who have been notified of this application and provided information describing the subject proposal. Please note that ALL adjoining property owners MUST be notified.

I, the undersigned, as an authorized representative of the applicant and Public Hearing item identified above, do solemnly swear and attest, subject to criminal penalties for false swearing, that the information provided in this Citizen Participation Form - Part B and in any and all documents provided in support of this report are true and accurate. I further understand that any false statements provided by representatives of the applicant as part of this report may result in penalties up to and including denial of the subject application.

Signature of Authorized Agent: _____ Date: 1/16/2026

Print Form

Letter to 500 Foot Property Owners

December 19, 2026

The Providence Group of Georgia, LLC
11340 Lakefield Drive, Suite 140
Johns Creek, GA 30097

RE: **MP-26-03/CLUP-26-01/Z-26-01/V-26-02 TPG Brookside West**

Dear Property Owner:

Please allow this letter to serve as public notice for consideration of a master plan amendment, comprehensive land use plan amendment, rezoning and variances to allow for the redevelopment of a 5 story, 130,828 square foot office building with 104 'For-Sale' townhomes on 8.77 acres in the Brookside Master Plan. A master plan amendment is requested to the Brookside Master Plan Pod A to allow the proposed development. A comprehensive land use plan amendment is requested from 'Corporate Office' to 'High Density Residential' and a rezoning is requested from O-I (Office-Institutional) to R-10M (Dwelling, 'For-Rent' or 'For-Sale', Residential). Variances are requested from Unified Development Code (UDC) Subsection 2.2.10(d) to reduce the front setback along Brookside Parkway from 65' to 20' and reduce the minimum dwelling unit width from 20' to 18', UDC Subsection 3.2.8(B)(1)(a) to modify the 50' undisturbed buffer to a 15' planted buffer, and UDC Subsection 2.5.4 to reduce the minimum parking requirements for townhomes. The property is located at 3650 Brookside Parkway and is legally described as being located in Land Lots 43 & 44, 1st District, 1st Section, Fulton County, Georgia.

The Community Zoning Information Meeting (CZIM) will be held on **Wednesday, January 14, 2026 at 6:00 PM** in the Community Room in Alpharetta City Hall across from the Council Chambers. Alpharetta City Hall is Located at 2 Park Plaza, Alpharetta, GA, 30009. This is an informal meeting to allow the public to view public hearing requests, ask questions, and provide feedback.

The item will be considered by the Planning Commission on **Thursday, February 5 2026 at 6:30 PM**. and **City Council on Monday, February 23, 2026, at 6:30 PM**. The meetings will be held in the Council Chambers at City Hall, 2 Park Plaza, Alpharetta, GA 30009.

If you have any questions regarding the request, please feel free to contact me at your convenience. I can be reached at cwalters@theprovidencegroup.com.

Sincerely,

Clint Walters
The Providence Group of Georgia, LLC

500 Foot Property Owner List

3750 BROOKSIDE LLC
6400 POWERS FERRY RD SUITE 150
ATLANTA GA 30339

BOARD OF REGENTS OF THE
UNIVERSITY SYSTEM OF GEORGIA
270 WASHINGTON ST SW
ATLANTA GA 30334

BOARD OF REGENTS OF THE
UNIVERSITY SYSTEM OF GEORGIA
270 WASHINGTON ST SW STE 6122
ATLANTA GA 30334

BOF II GA BROOKSIDE LLC
FIVE CONCOURSE DR SUITE 3100
ATLANTA GA 30328

CH RETAIL FUND II ATLANTA
OLD MILTON FESTIVAL LLC
3819 MAPLE AVE
DALLAS TX 75219

FFI ALPHARETTA IL OWNER LLC
200 W MADISON STE 2650
CHICAGO IL 60606

FOAMWORKS ALPHARETTA LLC
P O BOX 368
ROSWELL GA 30077

GOETHE JANET
48 E 48TH ST
SAVANNAH GA 31405

HWY 120 SENIOR HOLDINGS LLC
171 STONEBRIDGE BLVD
EDMOND OK 73013

JD LD ATLANTA LLC
P.O. BOX 7555
REDLANDS CA 92375-0555

LOYALTY OLD MILTON PROPERTY LLC
3324 PEACHTREE RD # 3005
ATLANTA GA 30326

PLUSKOTA MICHELLE LOUISE
& PLUSKOTA JOHN
470 GARRICK PT
ALPHARETTA GA 30022

PSC HOLDINGS ALPHARETTA LLC
11745 BENTHAM CT
ALPHARETTA GA 30005

SWNC ASPEN STATION LLC
1616 2ND AVE S STE 100
BIRMINGHAM AL 35233

TOUCHMARK NATIONAL BANK
3651 OLD MILTON PKWY
ALPHARETTA GA 30005

CITY OF ALPHARETTA

PUBLIC HEARING APPLICATION

FOR OFFICE USE ONLY
Case #: _____
PH #: _____
☐ Property Taxes & Code Violations Verified
☐ Fee Paid Initial: _____

COMMUNITY DEVELOPMENT DEPARTMENT • 2 PARK PLAZA • ALPHARETTA, GA 30009

1. This page should be the first page in each of your completed application packets.
2. It is preferred that all responses be typed. Illegible applications will not be accepted.
3. Prior to signing and submitting your application, please check all information supplied on the following pages to ensure that all responses are complete and accurate. Incomplete applications will not be accepted.
4. Payment of all applicable fees must be made at the time of application. Payment may be made via cash, credit card (American Express, Master Card or Visa), or check made payable to "City of Alpharetta." Please note that a 3% convenience fee will be added to all credit card transactions.
5. Applications will be accepted on the designated submittal dates between the hours of 8:30 AM and 3:30 PM.
6. If you have any questions regarding this form, please contact the Community Development Department by calling 678-297-6070.

Contact Information:

Contact Name: Portman Holdings, LLC c/o Mike Greene Telephone: 404-702-9111

Address: 303 Peachtree Center Ave NE Suite: 575

City Atlanta State: GA Zip: 30303 Fax:

Mobile Tel: Email: mgreene@portmanholdings.com

Subject Property Information:

Address: 3650 Brookside Parkway Current Zoning: O-I

District: 1st Section: 2nd Land Lot: 43 & 44 Parcel ID: 11 002000030299

Proposed Zoning: R-10M Current Use: Office

This Application For *(Check All That Apply)*:

- ☐ Conditional Use
- ■ Rezoning
- ■ Variance
- ☐ Exception
- ■ Master Plan Amendment
- ☐ Master Plan Review
- ☐ Public Hearing
- ☐ Other *(Specify)*: _____
- ■ Comprehensive Plan Amendment

Applicant Request And Intent

What is the proposed use(s) of the property?

See attached Statement of Intent

Applicant's Request (Please itemize the proposal):

See attached Statement of Intent

Applicant's Intent *(Please describe what the proposal would facilitate).*

See attached Statement of Intent

ALPHARETTA PLANNING COMMISSION REVIEW CRITERIA

How will this proposal be compatible with surrounding properties?

See attached Statement of Intent

How will this proposal affect the use and value of the surrounding properties?

See attached Statement of Intent

Can the property be developed for a reasonable economic use as currently zoned? Please explain why or why not.

See attached Statement of Intent

What would be the increase to population and traffic if the proposal were approved?

See attached Statement of Intent

What would be the impact to schools and utilities if the proposal were approved?

See attached Statement of Intent

How is the proposal consistent with the Alpharetta Comprehensive Plan; particularly the Future Land Use Map?

See attached Statement of Intent

Are there existing or changing conditions which affect the development of the property and support the proposed request?

See attached Statement of Intent

On a separate sheet or sheets, please provide any information or evidence that supports your request and the statements that you have provided in this application.

BOARD OF ZONING APPEALS REVIEW CRITERIA

Please respond to the following ONLY if you are applying for a zoning variance.

Are there extraordinary and exceptional conditions pertaining to the subject property because of its size, shape, or topography? Please describe them.

See attached Statement of Intent

Would the application of the Zoning Code standards as they relate to the subject property create an unnecessary hardship? Please explain.

See attached Statement of Intent

Are there conditions that are peculiar to the subject property? Please describe them in detail.

See attached Statement of Intent

Would relief, if granted, cause substantial detriment to the public good or impair the purpose and intent of the Zoning Code? Please defend your response.

See attached Statement of Intent

On a separate sheet or sheets, please provide any information or evidence that supports your request and the statements that you have provided in this application.

Site Plan

PROPERTY DESCRIPTION

Being all that tract or parcel of land lying and being in Land Lots 2, 3 and 44, 1st District, 2nd Section, City of Alpharetta, Fulton County, Georgia and being more particularly described as follows:

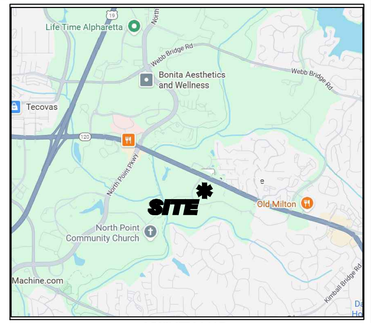
COMMENCING at the point of intersection of the southerly right-of-way line of Old Milton Parkway a.k.a. State Route 120 (having an apparent variable width public right-of-way) and the easterly right-of-way line of Brookside Parkway (having an apparent 80' public right-of-way); thence, leaving the aforesaid POINT OF COMMENCEMENT and continuing with the aforesaid right-of-way line of Brookside Parkway South 82° 30' 49" West, 41.86 feet; thence, South 24° 28' 08" West, 114.41 feet; thence, 68.51 feet along the arc of a curve deflecting to the right, having a radius of 852.00 feet and a chord bearing and distance of South 29° 19' 38" West, 68.49 feet; thence, North 65° 32' 15" West, 12.10 feet; thence, 65.49 feet along the arc of a curve deflecting to the right, having a radius of 840.00 feet and a chord bearing and distance of South 33° 58' 02" West, 65.47 feet to a capped rebar ("PBS&J PROP COR") found and the POINT OF BEGINNING.

Thence, from said POINT OF BEGINNING as thus established and continuing with the aforesaid right-of-way line of Brookside Parkway

1. South 65° 28' 51" East, 398.98 feet to a capped rebar ("PBS&J PROP COR") found; thence,
2. South 65° 28' 51" East, 62.46 feet to a capped rebar ("PBS&J PROP COR") found; thence,
3. South 24° 31' 09" West, 52.90 feet to a PK Nail found; thence,
4. South 65° 28' 51" East, 20.04 feet to a PK Nail found; thence,
5. South 24° 31' 09" West, 301.46 feet to a point; thence,
6. South 21° 41' 22" East, 215.45 feet to a PK Nail found; thence,
7. South 13° 28' 59" East, 47.78 feet to a PK Nail found; thence,
8. South 76° 31' 02" West, 149.17 feet to a capped rebar ("PBS&J PROP COR") found; thence,
9. 960.70 feet along the arc of a curve deflecting to the right and having a radius of 385.00 feet and a chord bearing and distance of North 31° 59' 52" West, 730.15 feet to a 1/2 inch rebar found; thence,
10. North 39° 29' 15" East, 189.68 feet to a 1/2 inch rebar found; thence,
11. 48.19 feet along the arc of a curve deflecting to the left and having a radius of 840.00 feet and a chord bearing and distance of North 37° 50' 38" East, 48.18 feet to the POINT OF BEGINNING, containing 381,916 square feet or 8.7676 acres of land, more or less.

Described property is subject to all rights-of-way (public and private) and easements, both recorded and unrecorded.





VICINITY MAP
not to scale

SITE DATA:

SITE AREA	8.7676 ACRES
TOTAL POD 'A'	84 ACRES

ZONING

EXISTING ZONING	O-I
PROPOSED ZONING	R-10M
ZONING JURISDICTION	CITY OF ALPHARETTA

DEVELOPMENT TYPE

TOTAL LOTS	104
SITE DENSITY	11.862 U/A
TOTAL DENSITY POD 'A'	6.120 U/A

DEVELOPMENT STANDARDS

FRONT YARD	20' BROOKSIDE PKWY/ 10' LANDSCAPE STRIP
MINIMUM BUILDING SEPARATION	20 FEET
MAXIMUM BUILDING HEIGHT	3 STORIES
MINIMUM LOT WIDTH	18 FEET
MINIMUM LOT SIZE	NONE
MAXIMUM DENSITY	10 U/A

PARKING

GARAGE	208
DRIVEWAY	208
GUEST SPACES	43
TOTAL	459

NOTES

1. SPEED LIMIT OF OLD BROOKSIDE PARKWAY IS 35 MPH.
2. ACCORDING TO THE U.S. FISH AND WILDLIFE SERVICE NATIONAL WETLANDS INVENTORY - WETLANDS ARE NOT LOCATED ON THIS SITE.
3. ACCORDING TO THE FEMA FLOOD INSURANCE RATE MAP FOR FULTON COUNTY 13121C0078F and 13121C0086F, EFFECTIVE DATE 9/18/2013. THE PROPERTY DOES NOT FALL WITHIN A DESIGNATED FLOOD ZONE "A" (AREAS OF 100 YEAR FLOOD).
4. WATERS OF THE STATE ARE WITHIN 200' OF THIS PROPERTY.
5. THE CHATTAHOOCHEE RIVER IS NOT WITHIN 2000' OF THIS PROPERTY.
6. ALPHARETTA FIRE DEPARTMENT SHALL APPROVE ROAD LAYOUT AND ENTRANCES.
7. WATER SERVICE SHALL BE PROVIDED BY FULTON COUNTY. EXISTING WATER SERVICE WILL BE USED
8. SANITARY SEWER SERVICE WILL BE PROVIDED BY FULTON COUNTY. EXISTING SEWER WILL BE TAPPED ON SITE.
9. SPECIMEN TREE LOCATIONS TAKEN FROM TREE STUDY PERFORMED BY

VARIANCES

1. ALPHARETTA UDC § 2.2.10.D TO ALLOW A 20-FOOT SETBACK ALONG BROOKSIDE PARKWAY PURSUANT TO THE SMALL AREA PLAN.
2. ALPHARETTA UDC § 3.2.8.B.1.A TO REDUCE THE 50-FOOT UNDISTURBED BUFFER TO A 15-FOOT PLANTED BUFFER.
2. ALPHARETTA UDC § 2.2.10.D TO REDUCE THE INDIVIDUAL LOT WIDTH MINIMUM FROM 20-FEET TO 18-FEET.
3. ALPHARETTA UDC § 2.5.4 TO REDUCE THE MINIMUM PARKING REQUIREMENTS FOR EACH TOWNHOME UNIT TO BE MET WITHIN THE ASSOCIATED GARAGE AND DRIVEWAY.

SURVEY NOTES

1. ALL BOUNDARY AND TOPOGRAPHIC INFORMATION TAKEN FROM THE SURVEY BY TERRAMARK LAND SURVEY INC, ON 5-21-2025.
2. UNLESS OTHERWISE SPECIFIED, ALL DISTANCES SHOWN ARE HORIZONTAL GROUND DISTANCES.

thePROVIDENCEgroup

Clint Walters

11340 Lakefield Drive
Building II, Suite 200

Johns Creek, Georgia 30097
Tele: (678) 475-1800

Kimley»Horn

ZONING PLAN

BROOKSIDE WEST

GEORGIA REGISTERED LANDSCAPE ARCHITECT EDWARD J. ANDERSON

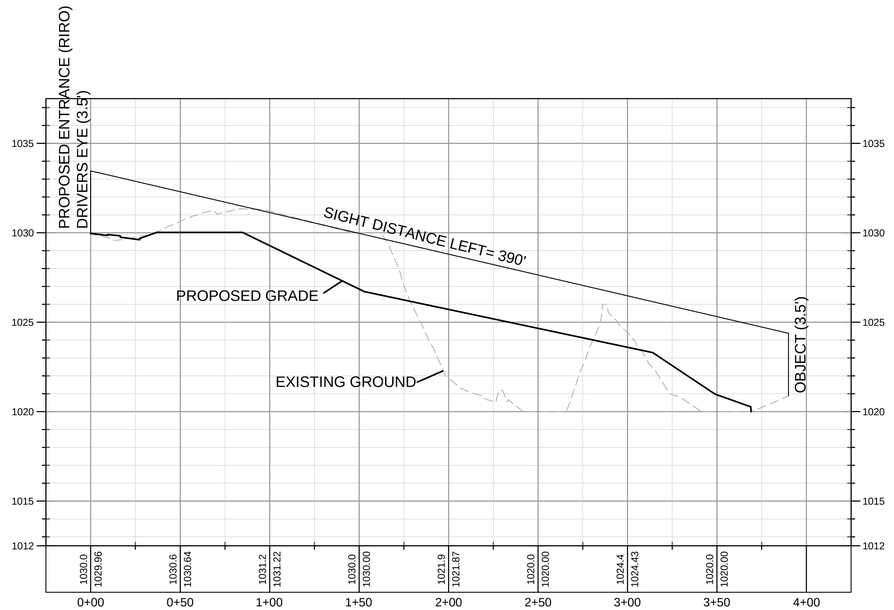
Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

12/01/2025
SCALE 1" = 40'
JOB #019913084

1 of 1

THIS DOCUMENT, TOGETHER WITH THE CONCEPTS AND DESIGNS PRESENTED HEREIN, AS AN INSTRUMENT OF SERVICE, IS INTENDED ONLY FOR THE SPECIFIC PURPOSE AND CLIENT FOR WHICH IT WAS PREPARED. REUSE OF AND IMPROPER RELIANCE ON THIS DOCUMENT WITHOUT WRITTEN AUTHORIZATION AND ADAPTATION BY KIMLEY-HORN AND ASSOCIATES, INC. SHALL BE WITHOUT LIABILITY TO KIMLEY-HORN AND ASSOCIATES, INC. COPYRIGHT KIMLEY-HORN AND ASSOCIATES, INC., 2025





PROFILE VIEW
SIGHT DISTANCE
1" = 40' HORZ.

NORTH

0 20 40 80
SCALE IN FEET

thePROVIDENCEgroup

BROOKSIDE WEST | SIGHT DISTANCE PLAN

ALPHARETTA, GA
12/01/25

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Kimley»Horn

Images – Mixed TH 18’/20’/22’ Blended Three Story TH Rear Load











Owners Authorization

PROPERTY OWNER AUTHORIZATION

Property Owner Information:

Contact Name: JD LD Atlanta LLC C/o Mark Block Telephone: 404-504-7778

Address: 3343 Peachtree Rd, NE Suite: 1100

City Atlanta State: GA Zip: 30326 -

Authorization:

I do solemnly swear and attest, subject to criminal penalties for false swearing, that I am the legal owner, as reflected in the records of Fulton County, Georgia, of the property identified below, which is the subject of the attached Application for Public Hearing before the City of Alpharetta, Georgia.

As the legal owner of record of the subject property, I hereby authorize the individual named below to act as the applicant in the pursuit of the Application for Public Hearing in request of the items indicated below.

- ☐ Annexation
- ☒ Rezoning
- ☒ Variance
- ☐ Land Use Application
- ☐ Special Use
- ☐ Conditional Use
- ☒ Master Plan
- ☒ Other

Property Owner's Authorized Applicant (if applicable):

Name of Authorized Applicant: Portman Holdings, LLC c/o Mike Greene Telephone: 404-702-9111

Address: 303 Peachtree Center Ave NE Suite: 575

City Atlanta State: GA Zip: 30303 -

So Sworn and Attested:

Owner Signature: [signature] Date: 12/1/2025

Notary:

Notary Signature: [signature] Date: 12/1/2025

12

CALIFORNIA JURAT **GOVERNMENT CODE § 8202**

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of San Bernardino

Subscribed and sworn to (or affirmed) before me on

this 1 (Date) day of December (Month), 20 25 (Year), by

(1) DONALD J. BERRY, JR

(and (2) _____ (Name(s) of Signer(s)),

proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me.



Place Notary Seal and/or Stamp Above

Signature _____ (Signature of Notary Public)

OPTIONAL

Completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document.

Description of Attached Document

Title or Type of Document: _____

Document Date: _____ Number of Pages: _____

Signer(s) Other Than Named Above: _____

©2019 National Notary Association

Disclosures

DISCLOSURE FORM

The Official Code of Georgia Annotated requires disclosure of campaign contributions to government officials by an applicant or opponent of a rezoning or public hearing petition (O.C.G.A. 36-67 A-1).

Applicants must file this form with the City of Alpharetta Community Development Department within ten (10) days after filing for rezoning or public hearing. Opponents to a rezoning or public hearing petition must file this form five (5) days prior to the Planning Commission meeting at which the subject rezoning or public hearing petition is scheduled to be heard.

Name of Applicant or Opponent: Portman Holdings

Subject Public Hearing Case: 3650 Brookside Pkwy

Campaign Contribution Information:

Please provide the requested information for each contribution with a dollar amount or value of $250 or more made within the past two (2) years to an Alpharetta Official by the individual identified above. Please use a separate form for each Alpharetta Official to whom such a contribution as been made.

If the individual identified above has made no such contributions to an Alpharetta Official within the past two (2) years, please indicate this by entering "N/A" on the appropriate lines below.

Name of Official: _____ Position: _____

Description of Contribution: _____ Value: _____

Description of Contribution: N/A Value: _____

Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Campaign Contribution Information:

I do solemnly swear and attest, subject to criminal penalties for false swearing, that the information provided in this Disclosure Form is true and accurate and that I have disclosed herein any and all campaign contributions made to an Official of the City of Alpharetta, Georgia in accordance with O.C.G.A. 36-67 A-1.

Signature: _____ Date: 12/1/25

Andrew Krull
COO, Portman Holdings

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Name of Applicant or Opponent: The Providence Group of Georgia, LLC

Subject Public Hearing Case: 3650 Brookside Parkway

Campaign Contribution Information:

Please provide the requested information for each contribution with a dollar amount or value of $250 or more made within the past two (2) years to an Alpharetta Official by the individual identified above. Please use a separate form for each Alpharetta Official to whom such a contribution as been made.

If the individual identified above has made no such contributions to an Alpharetta Official within the past two (2) years, please indicate this by entering "N/A" on the appropriate lines below.

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Description of Contribution: _____ Value: _____

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Signature: _____ Date: 12/1/25

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Name of Applicant or Opponent: Dennis J. Webb, Jr. - Smith, Gambrell & Russell, LLP

Subject Public Hearing Case: _____

Campaign Contribution Information:

Please provide the requested information for each contribution with a dollar amount or value of $250 or more made within the past two (2) years to an Alpharetta Official by the individual identified above. Please use a separate form for each Alpharetta Official to whom such a contribution as been made.

If the individual identified above has made no such contributions to an Alpharetta Official within the past two (2) years, please indicate this by entering "N/A" on the appropriate lines below.

Name of Official: N/A Position: _____

Description of Contribution: _____ Value: _____

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Description of Contribution: _____ Value: _____

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Signature: _____ Date: 12/1/2025

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Name of Applicant or Opponent: J. Alexander Brock - Smith, Gambrell & Russell, LLP

Subject Public Hearing Case: _____

Campaign Contribution Information:

Please provide the requested information for each contribution with a dollar amount or value of $250 or more made within the past two (2) years to an Alpharetta Official by the individual identified above. Please use a separate form for each Alpharetta Official to whom such a contribution as been made.

If the individual identified above has made no such contributions to an Alpharetta Official within the past two (2) years, please indicate this by entering "N/A" on the appropriate lines below.

Name of Official: N/A Position: _____

Description of Contribution: _____ Value: _____

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Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Campaign Contribution Information:

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Signature:  Date: 12/1/2025

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Name of Applicant or Opponent: Kathryn M. Zickert - Smith, Gambrell & Russell, LLP

Subject Public Hearing Case: _____

Campaign Contribution Information:

Please provide the requested information for each contribution with a dollar amount or value of $250 or more made within the past two (2) years to an Alpharetta Official by the individual identified above. Please use a separate form for each Alpharetta Official to whom such a contribution as been made.

If the individual identified above has made no such contributions to an Alpharetta Official within the past two (2) years, please indicate this by entering "N/A" on the appropriate lines below.

Name of Official: N/A Position: _____

Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Campaign Contribution Information:

I do solemnly swear and attest, subject to criminal penalties for false swearing, that the information provided in this Disclosure Form is true and accurate and that I have disclosed herein any and all campaign contributions made to an Official of the City of Alpharetta, Georgia in accordance with O.C.G.A. 36-67 A-1.

Signature: Kathryn M Zickert Date: 12/1/2025

DISCLOSURE FORM

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Name of Applicant or Opponent: Kirk R. Fjelstul - Smith, Gambrell & Russell, LLP

Subject Public Hearing Case: _____

Campaign Contribution Information:

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If the individual identified above has made no such contributions to an Alpharetta Official within the past two (2) years, please indicate this by entering "N/A" on the appropriate lines below.

Name of Official: N/A Position: _____

Description of Contribution: _____ Value: _____

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Description of Contribution: _____ Value: _____

Description of Contribution: _____ Value: _____

Campaign Contribution Information:

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Signature:  Date: 12/1/2025

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Name of Applicant or Opponent: JD LD Atlanta LLC

Subject Public Hearing Case: 3650 Brookside Parkway

Campaign Contribution Information:

Please provide the requested information for each contribution with a dollar amount or value of $250 or more made within the past two (2) years to an Alpharetta Official by the individual identified above. Please use a separate form for each Alpharetta Official to whom such a contribution as been made.

If the individual identified above has made no such contributions to an Alpharetta Official within the past two (2) years, please indicate this by entering "N/A" on the appropriate lines below.

Name of Official: N/A **Position:** _____

Description of Contribution: _____ **Value:** _____

Description of Contribution: _____ **Value:** _____

Description of Contribution: _____ **Value:** _____

Description of Contribution: _____ **Value:** _____

Description of Contribution: _____ **Value:** _____

Campaign Contribution Information:

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Signature: _____ **Date:** 12/1/2025

13

Legal Description

PROPERTY DESCRIPTION
3650 BROOKSIDE PARKWAY SITE

Being all that tract or parcel of land lying and being in Land Lots 2, 3 and 44, 1st District, 2nd Section, City of Alpharetta, Fulton County, Georgia and being more particularly described as follows:

COMMENCING at the point of intersection of the southerly right-of-way line of Old Milton Parkway a.k.a. State Route 120 (having an apparent variable width public right-of-way) and the easterly right-of-way line of Brookside Parkway (having an apparent 80' public right-of-way); thence, leaving the aforesaid **POINT OF COMMENCEMENT** and continuing with the aforesaid right-of-way line of Brookside Parkway South 82° 30' 49" West, 41.86 feet; thence, South 24° 28' 08" West, 114.41 feet; thence, 68.51 feet along the arc of a curve deflecting to the right, having a radius of 852.00 feet and a chord bearing and distance of South 29° 19' 38" West, 68.49 feet; thence, North 65° 32' 15" West, 12.10 feet; thence, 65.49 feet along the arc of a curve deflecting to the right, having a radius of 840.00 feet and a chord bearing and distance of South 33° 58' 02" West, 65.47 feet to a capped rebar ("PBS&J PROP COR") found and the **POINT OF BEGINNING**.

Thence, from said **POINT OF BEGINNING** as thus established and continuing with the aforesaid right-of-way line of Brookside Parkway

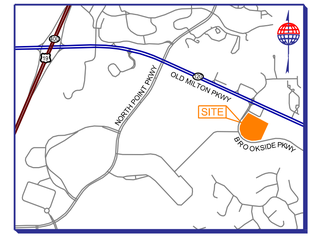
1. South 65° 28' 51" East, 398.98 feet to a capped rebar ("PBS&J PROP COR") found; thence,
2. South 65° 28' 51" East, 62.46 feet to a capped rebar ("PBS&J PROP COR") found; thence,
3. South 24° 31' 09" West, 52.90 feet to a PK Nail found; thence,
4. South 65° 28' 51" East, 20.04 feet to a PK Nail found; thence,
5. South 24° 31' 09" West, 301.46 feet to a point; thence,
6. South 21° 41' 22" East, 215.45 feet to a PK Nail found; thence,
7. South 13° 28' 59" East, 47.78 feet to a PK Nail found; thence,
8. South 76° 31' 02" West, 149.17 feet to a capped rebar ("PBS&J PROP COR") found; thence,
9. 960.70 feet along the arc of a curve deflecting to the right and having a radius of 385.00 feet and a chord bearing and distance of North 31° 59' 52" West, 730.15 feet to a 1/2 inch rebar found; thence,
10. North 39° 29' 15" East, 189.68 feet to a 1/2 inch rebar found; thence,
11. 48.19 feet along the arc of a curve deflecting to the left and having a radius of 840.00 feet and a chord bearing and distance of North 37° 50' 38" East, 48.18 feet to the **POINT OF BEGINNING**, containing 381,916 square feet or 8.7676 acres of land, more or less.

Described property is subject to all rights-of-way (public and private) and easements, both recorded and unrecorded.

Survey

THIS BLOCK RESERVED FOR THE CLERK OF THE SUPERIOR COURT.

ALTA/NSPS LAND TITLE SURVEY
FOR
PORTMAN HOLDINGS, LLC &
FIDELITY NATIONAL TITLE INSURANCE COMPANY
(3650 BROOKSIDE PARKWAY SITE)
LOCATED IN
LAND LOTS 43 & 44, 1ST DISTRICT, 2ND SECTION,
CITY OF ALPHARETTA, FULTON COUNTY, GEORGIA



LOCATION MAP
NOT TO SCALE
LAT - 34°03'44.85"N
LONG - 84°15'11.04"W

SURVEY NOTES

EQUIPMENT USED:
A TRIMBLE "S" SERIES TOTAL STATION WAS USED TO OBTAIN ANGULAR MEASUREMENTS AND DISTANCE MEASUREMENTS.

A TRIMBLE R-12 DUAL FREQUENCY GPS UNIT WAS USED FOR ESTABLISHING CONTROL, A NETWORK ADJUSTED RTK SURVEY WAS PERFORMED AND ADJUSTED BY RELATIVE POSITIONAL ACCURACY.

CLOSURE STATEMENT:
THIS SURVEY HAS BEEN CALCULATED FOR CLOSURE AND IS ACCURATE WITHIN ONE FOOT IN 281,100 FEET.

THE FIELD DATA UPON WHICH THIS SURVEY IS BASED HAD A CLOSURE OF ONE FOOT IN 63,582 FEET AND AN ANGULAR ERROR OF 05" PER ANGLE POINT AND WAS ADJUSTED USING THE COMPASS RULE.

THE BEARINGS SHOWN ON THIS SURVEY ARE COMPUTED ANGLES BASED ON A GRID BEARING BASE (GA WEST ZONE) NAD83.

ALL HORIZONTAL DISTANCES SHOWN ARE GROUND DISTANCES, MEASURING UNITS OF THIS SURVEY ARE IN U.S. SURVEY FEET.

CONTOURS ARE SHOWN AT TWO FOOT INTERVALS, ELEVATIONS ARE BASED ON RTK GLOBAL POSITIONING SYSTEMS OBSERVATION AND ARE RELATIVE TO NAVD 88 DATUM.

FIELD WORK FOR THIS PROPERTY WAS COMPLETED ON MAY 16, 2025.

DUE TO VARIANCES IN GPS EQUIPMENT, TECHNIQUES, FEDERAL ADJUSTMENTS TO STATE PLANE MODELS AND DAILY CONDITIONS IMPACTING GPS RECEPTIVITY, GPS SOLUTIONS MAY VARY FROM THOSE PROVIDED ON THIS SURVEY BOTH HORIZONTALLY AND VERTICALLY. ANY AND ALL CONTRACTORS, CONSULTANTS, INDIVIDUALS OR ENTITIES RELYING ON STATE PLANE COORDINATES TO RELATE TO DATA PROVIDED ON THIS SURVEY MUST LOCALIZE TO THE SURVEY CONTROL, BENCHMARKS OR PROPERTY MONUMENTATION, ESTABLISHED BY THIS SURVEY IN ORDER TO ENSURE ACCURACY OF DATA. THE OWNER, HIS EMPLOYEES, HIS CONSULTANTS, HIS CONTRACTORS, AND/OR HIS AGENTS SHALL HEREBY DISTINCTLY UNDERSTAND THAT THE SURVEYOR IS NOT RESPONSIBLE FOR ISSUES ENCOUNTERED DUE TO FAILURE TO LOCALIZE DIRECTLY TO THIS SURVEY DATUM.

INFORMATION REGARDING SIZE, LOCATION, AND SPECIES OF EXISTING TREES IS SHOWN HEREON. THERE IS NO CERTAINTY OF THE SIZE AND SPECIES OF THE SAID TREES WITHOUT VERIFICATION FROM THE DESIGNATED ARBORIST BY THE LOCAL REGULATORY AUTHORITY. THE OWNER, HIS EMPLOYEES, HIS CONSULTANTS, HIS CONTRACTORS, AND/OR HIS AGENTS SHALL HEREBY DISTINCTLY UNDERSTAND THAT THE SURVEYOR IS NOT RESPONSIBLE FOR THE CORRECTNESS OR SUFFICIENCY OF THIS INFORMATION SHOWN HEREON EXCEPT BY APPROVAL OF SAID AUTHORITY.

THIS SURVEY MAY NOT REPRESENT OFFSITE PAINT STRIPING TO THE ACCURACY REQUIRED FOR LANE DESIGN. TERRAMARK LOCATES THE EDGE OF PAVING AND CRITICAL POINTS TO REFLECT ACCURATE TOPOGRAPHIC DATA ONLY, ACCURACY OF PAINT LOCATIONS SHOULD BE VERIFIED WITH SURVEYOR PRIOR TO USING THIS SURVEY FOR DESIGN.

INFORMATION REGARDING THE REPUTED PRESENCE, SIZE, CHARACTER, AND LOCATION OF EXISTING UNDERGROUND UTILITIES AND STRUCTURES IS SHOWN HEREON. THERE IS NO CERTAINTY TO THE ACCURACY OF THIS INFORMATION AND IT SHALL BE CONSIDERED IN THAT LIGHT BY THOSE USING THIS DRAWING. THE LOCATION AND ARRANGEMENT OF UNDERGROUND UTILITIES AND STRUCTURES SHOWN HEREON MAY BE INACCURATE AND UTILITIES AND STRUCTURES NOT SHOWN MAY BE ENCOUNTERED, THE OWNER, HIS EMPLOYEES, HIS CONSULTANTS, HIS CONTRACTORS, AND/OR HIS AGENTS SHALL HEREBY DISTINCTLY UNDERSTAND THAT THE SURVEYOR IS NOT RESPONSIBLE FOR THE CORRECTNESS OR SUFFICIENCY OF THE INFORMATION SHOWN HEREON AS TO SUCH UNDERGROUND INFORMATION.

INFORMATION REGARDING STORM SEWER AND SANITARY SEWER AS SHOWN HEREON, IS BASED ON OBSERVATIONS TAKEN BY TERRAMARK EMPLOYEES AT THE GROUND ELEVATION OF THE EXISTING STRUCTURE. TERRAMARK EMPLOYEES ARE NOT AUTHORIZED TO ENTER A CONFINED SPACE SUCH AS A STRUCTURE, THEREFORE, THERE IS NO CERTAINTY OF THE PIPE SIZES AND PIPE MATERIAL THAT ARE SHOWN ON THIS SURVEY. EXCAVATION BY A CERTIFIED CONTRACTOR IS THE ONLY WAY TO VERIFY PIPE SIZE AND MATERIAL. THE OWNER, HIS EMPLOYEES, HIS CONSULTANTS, HIS CONTRACTORS, AND/OR HIS AGENTS SHALL HEREBY DISTINCTLY UNDERSTAND THAT THE SURVEYOR IS NOT RESPONSIBLE FOR THE CORRECTNESS OR SUFFICIENCY OF THE PIPE INFORMATION SHOWN HEREON.

TERRAMARK LAND SURVEYING, INC. WAS UNABLE TO DETERMINE THE EXTENT OF PIPES MARKED AS APPROXIMATE DIRECTION ONLY. AFORESAID PIPE IS DRAWN ON THE SURVEY TO REFLECT THE OBSERVED DIRECTION BASED UPON A VISUAL INSPECTION OF THE STRUCTURE ONLY AND IS SHOWN FOR INFORMATIONAL PURPOSES.

STATE WATERS AND BUFFERS AS SHOWN OR NOT SHOWN HEREON ARE SUBJECT TO REVIEW BY LOCAL JURISDICTION OFFICIALS. IT IS THE RESPONSIBILITY OF THE LOCAL AUTHORITY TO DETERMINE SPECIFIC WATER CLASSIFICATION. THEREFORE TERRAMARK LAND SURVEYING ACCEPTS NO RESPONSIBILITY IN THE IDENTIFICATION OF SAID WATERS OR BUFFERS IDENTIFIED OR NOT IDENTIFIED HEREON.

PROPERTY IS SUBJECT TO RIGHTS OF UPPER AND LOWER RIPARIAN OWNERS IN AND TO THE WATER OF CREEKS AND BRANCHES CROSSING OR ADJOINING SUBJECT PROPERTY AND THE NATURAL FLOW THEREOF, FREE FROM DIMINUTION OR POLLUTION.

THIS SURVEY WAS PREPARED FOR THE EXCLUSIVE USE OF THE PERSON, PERSONS OR ENTITY NAMED HEREON, THIS SURVEY DOES NOT EXTEND TO ANY UNNAMED PERSON, PERSONS OR ENTITY WITHOUT THE EXPRESS CERTIFICATION BY THE SURVEYOR NAMING SAID PERSON, PERSONS OR ENTITY.

TERRAMARK LAND SURVEYING, INC. DOES NOT WARRANT THE EXISTENCE OR NON-EXISTENCE OF ANY WETLANDS OR HAZARDOUS WASTE IN THE SURVEY AREA.

SITE MAP



AERIAL IMAGE PROVIDED BY GOOGLE EARTH
IMAGERY DATED JUNE 23, 2023

REFERENCE MATERIAL

1. FINAL PLAT FOR GLEN ABBEY, UNIT VIII
   RECORDED IN PLAT BOOK 229 PAGE 14
   AMONG THE LAND RECORDS OF FULTON COUNTY, GEORGIA
2. FINAL PLAT FOR GLEN ABBEY, UNIT X
   RECORDED IN PLAT BOOK 214 PAGE 113
   AMONG THE AFORESAID RECORDS
3. BOUNDARY SURVEY FOR BROOKSIDE DEVELOPMENT
   RECORDED IN PLAT BOOK 342 PAGE 83
   AMONG THE AFORESAID RECORDS
4. EASEMENT EXHIBIT FOR NORTH POINT MINISTRIES, INC
   RECORDED IN PB, 345 PG. 63
5. EASEMENT AGREEMENT TO WEEKS REALTY, L.P.,
   RECORDED IN DEED BOOK DEED BOOK 50672 PAGE 308
6. LAYOUT PLAN FOR GEORGIA STATE UNIVERSITY ALPHARETTA
   CENTER, PREPARED BY AEC, INC., DATED 12-31-1998,
   LAST REVISED 04-08-1999.
7. ALTA/NSPS LAND TITLE SURVEY FOR BOARD OF REGENTS OF THE
   UNIVERSITY SYSTEM OF GEORGIA
   PREPARED BY TERRAMARK LAND SURVEYING, INC.
   DATED FEBRUARY 15, 2019
8. ALTA/NSPS LANT TITLE SURVEY, PREPARED BY CDS
   DATED MARCH 9, 2021
9. ALTA/NSPS LANT TITLE SURVEY FOR PORTMAN HOLDINGS, LLC &
   FIDELITY NATIONAL TITLE INSURANCE COMPANY
   PREPARED BY TERRAMARK LAND SURVEYING, INC.
   DATED OCTOBER 9, 2024

UTILITY NOTES

THE UNDERGROUND UTILITIES SHOWN HEREON ARE BASED ON LOCATION OF MARKINGS PROVIDED BY:

RHD SERVICES
PO BOX 813399
SMYRNA, GA 30081
PHONE: 404-874-8585
RHDSERVICES.COM

THE UNDERGROUND UTILITIES (EXCEPT THE LOCATION OF EXISTING DRAINAGE, SEWER, AND IRRIGATION UTILITIES AS WELL AS UNDERGROUND STORAGE TANKS) WERE LOCATED BY RHD SERVICES, UTILIZING RADIO FREQUENCY TECHNIQUE AND IN ACCORDANCE TO LEVEL "B" UTILITY LOCATION CRITERIA. THIS TECHNIQUE IS CAPABLE OF LOCATING METALLIC UTILITIES AND TRACER WIRES, ANY NON- METALLIC UTILITIES (WITHOUT TRACER WIRE) ARE NOT LOCATED.

THE SURVEYOR MAKES NO GUARANTEES THAT THE UNDERGROUND UTILITIES SHOWN COMPRISE ALL SUCH UTILITIES IN THE AREA, EITHER IN- SERVICE OR ABANDONED, UNDERGROUND UTILITIES NOT OBSERVED OR LOCATED UTILIZING THIS TECHNIQUE MAY EXIST ON THIS SITE BUT ARE NOT SHOWN, AND MAY BE FOUND UPON EXCAVATION. THE SURVEYOR FURTHER DOES NOT WARRANT THAT THE UNDERGROUND UTILITIES SHOWN ARE IN THE EXACT LOCATION INDICATED ALTHOUGH THE SURVEYOR DOES CERTIFY THAT THEY ARE LOCATED AS ACCURATELY AS POSSIBLE FROM INFORMATION AVAILABLE.

INFORMATION REGARDING MATERIAL AND SIZE OF UTILITIES IS BASED ON RECORDS ACQUIRED FROM THE UTILITY OWNERS.

UTILITY PROVIDERS

GAS

ATLANTA GAS LIGHT
(404) 584-4338

POWER

GEORGIA POWER COMPANY
(404) 506-6539

WATER

FULTON COUNTY
(404) 612-4248

COMMUNICATION

AT&T
(305) 409-1542

COMCAST
(678) 708-7112

FIBERLIGHT, LLC
(800) 672-0181

CENTURYLING/
LEVEL 3 COMMUNICATIONS, INC
(877) 366-8344

VERIZON / MCI
(800) 624-9675

ZAYO FIBER SOLUTIONS
(800) 961-6500

SITE AREA

381,916 SQ.FT.
OR
8.7676 AC.

PROPERTY DESCRIPTION

Being all that tract or parcel of land lying and being in Land Lots 2, 3 and 44, 1st District, 2nd Section, City of Alpharetta, Fulton County, Georgia and being more particularly described as follows:

COMMENCING at the point of intersection of the southerly right-of-way line of Old Milton Parkway a.k.a. State Route 120 (having an apparent variable width public right-of-way) and the easterly right-of-way line of Brookside Parkway (having an apparent 80' public right-of-way); thence, leaving the aforesaid POINT OF COMMENCEMENT and continuing with the aforesaid right-of-way line of Brookside Parkway South 82° 30' 49" West, 41.86 feet; thence, South 24° 28' 08" West, 114.41 feet; thence, 68.51 feet along the arc of a curve deflecting to the right, having a radius of 852.00 feet and a chord bearing and distance of South 29° 19' 38" West, 68.49 feet; thence, North 65° 32' 15" West, 12.10 feet; thence, 65.49 feet along the arc of a curve deflecting to the right, having a radius of 840.00 feet and a chord bearing and distance of South 33° 58' 02" West, 65.47 feet to a capped rebar ("PBS&J PROP COR") found and the POINT OF BEGINNING,

Thence, from said POINT OF BEGINNING as thus established and continuing with the aforesaid right-of-way line of Brookside Parkway

1. South 65° 28' 51" East, 398.98 feet to a capped rebar ("PBS&J PROP COR") found; thence,
2. South 65° 28' 51" East, 62.46 feet to a capped rebar ("PBS&J PROP COR") found; thence,
3. South 24° 31' 09" West, 52.90 feet to a PK Nail found; thence,
4. South 65° 28' 51" East, 20.04 feet to a PK Nail found; thence,
5. South 24° 31' 09" West, 301.46 feet to a point; thence,
6. South 21° 41' 22" East, 215.45 feet to a PK Nail found; thence,
7. South 13° 28' 59" East, 47.76 feet to a PK Nail found; thence,
8. South 76° 31' 02" West, 149.17 feet to a capped rebar ("PBS&J PROP COR") found; thence,
9. 960.70 feet along the arc of a curve deflecting to the right and having a radius of 385.00 feet and a chord bearing and distance of North 31° 59' 52" West, 730.15 feet to a 1/2 inch rebar found; thence,
10. North 39° 29' 15" East, 189.68 feet to a 1/2 inch rebar found; thence,
11. 48.19 feet along the arc of a curve deflecting to the left and having a radius of 840.00 feet and a chord bearing and distance of North 37° 50' 05" East, 48.18 feet to the POINT OF BEGINNING, containing 381,916 square feet or 8.7676 acres of land, more or less.

Described property is subject to all rights-of-way (public and private) and easements, both recorded and unrecorded.

SPECIAL NOTES

1. CERTIFICATION AND DECLARATION IS MADE TO THE ENTITIES AS LISTED IN THE TITLE BLOCK AND/OR CERTIFICATIONS, THE CERTIFICATIONS AND DECLARATIONS ON THIS PLAT ARE NOT TRANSFERABLE TO ADDITIONAL INSTITUTIONS OR SUBSEQUENT OWNERS.
2. SUBSURFACE AND ENVIRONMENTAL CONDITIONS WERE NOT EXAMINED OR CONSIDERED AS A PART OF THIS SURVEY, NO STATEMENT IS MADE CONCERNING THE EXISTENCE OF UNDERGROUND OR OVERHEAD CONTAINERS OR FACILITIES THAT MAY AFFECT THE USE OR DEVELOPMENT OF THIS PROPERTY.
3. PURSUANT TO RULE 180-6.09 OF THE GEORGIA STATE BOARD OF REGISTRATION FOR PROFESSIONAL ENGINEERS AND SURVEYORS, THE TERM "CERTIFICATION" RELATING TO PROFESSIONAL ENGINEERING AND LAND SURVEYING SERVICES SHALL MEAN A SIGNED STATEMENT BASED UPON FACTS AND KNOWLEDGE KNOWN TO THE REGISTRANT AND IS NOT A GUARANTEE OR WARRANTY, EITHER EXPRESSED OR IMPLIED.
4. NO CEMETERIES OR BURIAL GROUNDS HAVE BEEN OBSERVED BY TERRAMARK.
5. NO WETLAND DELINEATION MARKINGS HAVE BEEN OBSERVED BY TERRAMARK.
6. NO RECENT EARTH MOVING OR BUILDING CONSTRUCTION HAS BEEN OBSERVED BY TERRAMARK.
7. NO CHANGE IN STREET RIGHTS OF WAY HAVE BEEN MADE AVAILABLE TO TERRAMARK.

SITE INFORMATION

CURRENT OWNER: JD/LD ATLANTA, LLC
DB. 46905 PG. 521

TAX PARCEL ID # 11 002000030299

ADDRESS: 3650 BROOKSIDE PARKWAY

ZONING: O-I (OFFICE INSTITUTIONAL)
JURISDICTION: CITY OF ALPHARETTA

SETBACKS:
FRONT (LOCAL) - 50 FEET
FRONT (ALL OTHERS) - 65 FEET
SIDE - 15 FEET
REAR - 15 FEET
MAX. BUILDING HEIGHT - 40 FEET

PARKING COUNT:
REGULAR PARKING - 583
HANDICAPPED PARKING - 14
TOTAL PARKING COUNT - 597

TITLE NOTES

ACCORDING TO THE "FIRM" (FLOOD INSURANCE RATE MAPS) OF FULTON COUNTY, GEORGIA, PANEL NUMBERS 13121C0059F AND 13121C0067F, HAVING AN EFFECTIVE DATE OF SEPTEMBER 18, 2013 THE SURVEYED PROPERTY APPEARS TO LINE IN ZONE X PER GRAPHICAL PLOTTING. ZONE X IS DEFINED AS AN AREA OF MINIMAL FLOOD HAZARD.

THE SURVEYED PROPERTY HAS DIRECT PEDESTRIAN AND VEHICULAR ACCESS TO THE APPARENT PUBLIC RIGHT OF WAY OF BROOKSIDE PARKWAY AS SHOWN AND LABELED HEREON.

THIS SURVEY WAS PREPARED WITH THE BENEFIT OF AN ALTA COMMITMENT FOR TITLE INSURANCE ISSUED BY FIDELITY NATIONAL TITLE INSURANCE COMPANY, COMMITMENT NUMBER 241896GA AND HAVING AN EFFECTIVE DATE OF COMMITMENT OF AUGUST 27, 2024, WHICH REVEALS THE FOLLOWING ENCUMBERANCES:

11. MASTER DECLARATION OF PROTECTIVE COVENANTS FOR BROOKSIDE BY REALTICORP 528, LLC, A SOUTH CAROLINA LIMITED LIABILITY COMPANY, DATED OCTOBER 17, 1997, FILED FOR RECORD OCTOBER 24, 1997, AND RECORDED IN DEED BOOK 23303, PAGE 128, AFORESAID RECORDS; AS AFFECTED BY ESTOPPEL AND RATIFICATION AGREEMENT BY AND BETWEEN ALPHA CAPITAL EQUITY, LLC AND BROOKSIDE ASSOCIATION, INC., FILED AND RECORDED PARIL 4, 2006 IN DEED BOOK 42269, PAGE 417, AFORESAID RECORDS; AS AMENDED BY FIRST AMENDMENT TO MASTER DECLARATION OF PROTECTIVE COVENANTS FOR BROOKSIDE, FILED AND RECORDED OCTOBER 13, 2014 IN DEED BOOK 54241, PAGE 296, AFORESAID RECORDS
(AFFECTS SURVEYED PROPERTY – SHOWN ON SURVEY WHERE PLOTABLE)

12. EASEMENT FROM NATIONAL BUILD TO SUIT BROOKSIDE 100, LLC TO GEORGIA POWER COMPANY, DATED JUNE 25, 1999, FILED FOR RECORD AUGUST 1, 1999, AND RECORDED IN DEED BOOK 27394, PAGE 20, AFORESAID RECORDS.
(AFFECTS SURVEYED PROPERTY – SHOWN ON SURVEY)

13. INDEMNIFICATION FLOOD PLAIN FROM CROW-CHILDRESS-MOBLEY #7A, A TEXAS LIMITED PARTNERSHIP TO FULTON COUNTY GEORGIA, DATED NOVEMBER 8, 1988, FILED FOR RECORD NOVEMBER 14, 1988, AND RECORDED IN DEED BOOK 12043, PAGE 8, AFORESAID RECORDS.
(UNABLE TO DETEOMINE AFFECT ON SURVEYED PROPERTY – ATTACHMENT IN RECORDED DOCUMENT IS NOT LEGIBLE AND SURVEYOR CANNOT PLOT)

14. RECIPROCAL EASEMENT AGREEMENT BY AND BETWEEN NATIONAL BUILD TO SUIT BROOKSIDE 100, L.L.C., A DELAWARE LIMITED LIABILITY COMPANY AND TAG LAND BROOKSIDE, L.L.C., A DELAWARE LIMITED LIABILITY COMPANY, DATED JUNE 20, 2008, 2008, FILED JUNE 25, 2008 AND RECORDED IN DEED BOOK 46905, PAGE 506, FULTON COUNTY, GEORGIA RECORDS; AMENDED BY FIRST AMENDMENT TO RECIPROCAL EASEMENT AGREEMENT BY AND BETWEEN JD/LD ATLANTA, LLC AND TG ARROW OLD MILTON, LLC, FILED AND RECORDED IN DEED BOOK 54559, PAGE 676, AFORESAID RECORDS.
(AFFECTS SURVEYED PROPERTY – SHOWN ON SURVEY)

15. UNRECORDED LEASE EVIDENCED BY MEMORANDUM OF BUILDING AND ROOFTOP LEASE AGREEMENT BETWEEN JD/LD ATLANTA, LLC AND VERIZON WIRELESS F(VAW) LLC, D/B/A VERIZON WIRELESS, AS EVIDENCED BY RECORDED DIN DEED BOOK 48044, PAGE 116, AFORESAID RECORDS.
(AFFECTS SURVEYED PROPERTY – SHOWN ON SURVEY)

ALTA/NSPS CERTIFICATE

TO: PORTMAN HOLDINGS, LLC & FIDELITY NATIONAL TITLE INSURANCE COMPANY

THIS IS TO CERTIFY THAT THIS MAP OR SURVEY AND THE SURVEY ON WHICH IT IS BASED WERE MADE IN ACCORDANCE WITH THE 2021 MINIMUM STANDARD DETAIL REQUIREMENTS FOR ALTA / NSPS LAND TITLE SURVEYS, JOINTLY ESTABLISHED AND ADOPTED BY ALTA AND NSPS, AND INCLUDES ITEMS 1,2,3,4,6(a),6(b),7(a),7(b1),7(c),8,9,11,13,14,16,17 & 19 OF TABLE A THEREOF. THE FIELD WORK WAS COMPLETED ON MAY 16, 2025, 2025.
THE DATE OF THE SURVEY OR MAP MAY 21, 2025.

PRELIMINARY
PENDING REVIEW AND COMMENT

PAUL B. CANNON, RLS
REGISTERED NUMBER: 2928

SURVEYOR'S CERTIFICATE

THIS PLAT IS A RETRACEMENT OF AN EXISTING PARCEL OR PARCELS OF LAND AND DOES NOT SUBDIVIDE OR CREATE A NEW PARCEL OR MAKE ANY CHANGES TO ANY REAL PROPERTY BOUNDARIES. THE RECORDING INFORMATION OF THE DOCUMENTS, MAPS, PLATS, OR OTHER INSTRUMENTS WHICH CREATED THE PARCEL OR PARCELS ARE STATED HEREON. RECORDATION OF THIS PLAT DOES NOT IMPLY APPROVAL OF ANY LOCAL JURISDICTION. AVAILABILITY OF PERMITS, COMPLIANCE WITH LOCAL REGULATIONS OR REQUIREMENTS, OR SUITABILITY FOR ANY USE OR PURPOSE OF THE LAND. FURTHERMORE, THE UNDERSIGNED LAND SURVEYOR CERTIFIES THAT THIS PLAT COMPLIES WITH THE MINIMUM TECHNICAL STANDARDS FOR PROPERTY SURVEYS IN GEORGIA AS SET FORTH IN THE RULES AND REGULATIONS OF THE GEORGIA BOARD OF REGISTRATION FOR PROFESSIONAL ENGINEERS AND LAND SURVEYORS AND AS SET FORTH IN O.C.G.A. SECTION 15-6-67.

PRELIMINARY
PENDING REVIEW AND COMMENT

PAUL B. CANNON, RLS
REGISTERED NUMBER: 2928

TerraMark Land Surveying, Inc.
1396 Bells Ferry Road
Marietta, Georgia 30066
Phone No. (770) 421-1927
www.TerraMark.com
C. O. A.# LSF000610

TerraMark Geospatial

No	Revision	Date
#1		
#2		
#3		
#4		
#5		
#6		
#7		
#8		

Project No.	2025-082
Survey Crew:	AA
Drawn By:	NEC
Approved By:	PBC
Date:	05/21/2025
Scale:	1"=30'
PATH:	S: SURVEY\ 2025\ 2025-082\ DGN\ B_ FDGN

ALTA/NSPS LAND TITLE SURVEY
FOR
PORTMAN HOLDINGS, LLC &
FIDELITY NATIONAL TITLE INSURANCE COMPANY
(3650 BROOKSIDE PARKWAY SITE)
LOCATED IN
LAND LOTS 43 & 44, 1ST DISTRICT, 2ND SECTION,
CITY OF ALPHARETTA, FULTON COUNTY, GEORGIA

SHEET NO.
1/3
DRAWING# TM 25-082

JOB NUMBER 2025-082 PLOT SIZE 24 X 36

AREAS OF INTEREST TABLE

(#) AREA OF INTEREST

1. SIDEWALK CROSSES PROPERTY LINE
2. STORM LINE CROSSES PROPERTY LINE
3. ELECTRIC LINE CROSSES PROPERTY LINE
4. WATER LINE CROSSES PROPERTY LINE
5. COMMUNICATION LINE CROSSES PROPERTY LINE

THIS BLOCK RESERVED FOR THE CLERK OF THE SUPERIOR COURT.

TREE LEGEND (ABBREVIATIONS)

DECIDUOUS (TREE) — HW HARDWOOD

* SEE TREE REPORT FOR TREE TAG INFORMATION

CONIFEROUS (TREE)

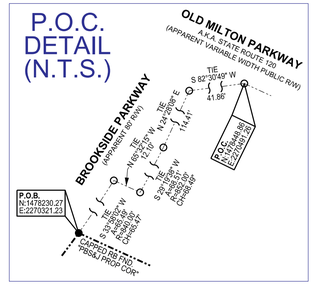
30 0 30 60 90 FT.

SCALE: 1" = 30'

LEGEND

- CURB AND GUTTER (C&G)
- FENCE
- HANDRAIL
- STORM DRAIN LINE
- SANITARY SEWER
- WATER LINE
- GAS LINE
- UGE — UNDERGROUND POWER LINE
- OHP — OVERHEAD POWER LINE
- COM — UNDERGROUND COMMUNICATION
- 100 — TOPOGRAPHIC CONTOUR
- PROPERTY LINE
- CATCH BASIN (DWCB)
- CATCH BASIN (SWCB)
- DROP INLET (DI)
- JUNCTION BOX (JB)
- HEAD WALL (HW)
- CURB INLET (CI)
- FLARED END SECTION (FES)
- OUTLET CONTROL STRUCTURE
- YARD DRAIN INLET
- SS MANHOLE (MH)
- CLEAN OUT (CO)
- IRRIGATION CONTROL VALVE (ICV)
- FIRE HYDRANT (FH)
- WATER VALVE (WV)
- WATER METER (WM)
- FIRE DEPT. CONNECTION (FDC)
- WATER VALVE MARKER
- TRANSFORMER BOX (TX)
- AIR CONDITIONER (AC)
- ELECTRIC METER (EM)
- ELECTRIC UTILITY
- GREASE TRAP (GT)
- LIGHT POLE (LP)
- POWER POLE WITH LIGHT
- POWER POLE (PP)
- UTILITY MANHOLE (UM)
- SPOTLIGHT
- GAS METER (GM)
- GAS VALVE (GV)
- TELEPHONE PEDESTAL
- COMMUNICATION BOX
- TRAFFIC SIGNAL
- BOLLARD (BO)
- MB — MAIL BOX
- SIGN
- CROSSWALK SIGNAL
- X 1000.00 SPOT ELEVATION
- CONCRETE AREA
- OVERHANG AREA
- RIP-RAP AREA
- BRICK AREA
- TREELINE

P.O.C. DETAIL (N.T.S.)



TREE LEGEND (ABBREVIATIONS)

DECIDUOUS (TREE) — HW HARDWOOD

* SEE TREE REPORT FOR TREE TAG INFORMATION

CONIFEROUS (TREE)

ABBREVIATIONS

A	ARC LENGTH	IPS	IRON PIN SET (CAPPED)
AC.	ACRE	N/F	NOW OR FORMERLY
AE	ACCESS EASEMENT	OTP	OPEN TOP PIPE
BSL	BUILDING SETBACK LINE	PB.	PLAT BOOK
BW	BARBWIRE	PG.	PAGE
CH	CHORD LENGTH	POB	POINT OF BEGINNING
CLF	CHAIN LINK FENCE	POC	POINT OF COMMENCEMENT
CMF	CONCRETE MONUMENT FOUND	R	RADIUS LENGTH
CMP	CORRUGATED METAL PIPE	R/W	RIGHT OF WAY
CONC.	CONCRETE	R/W MON	RIGHT OF WAY MONUMENT
CTP	CRIMP TOP PIPE	RB	REBAR
DB.	DEED BOOK	RCP	REINFORCED CONCRETE PIPE
DIP	DUCTILE IRON PIPE	SDE	STORM DRAINAGE EASEMENT
FDC	FIRE DEPARTMENT CONNECTION	SQ. FT.	SQUARE FEET
FND	FOUND	SSE	SANITARY SEWER EASEMENT
HDPE	HIGH DENSITY POLYETHYLENE PIPE	WPF	WOOD PRIVACY FENCE
IPF	IRON PIN FOUND		

ALTA/NSPS LAND TITLE SURVEY
FOR
PORTMAN HOLDINGS, LLC &
FIDELITY NATIONAL TITLE INSURANCE COMPANY
(3650 BROOKSIDE PARKWAY SITE)
LOCATED IN
LAND LOTS 43 & 44, 1ST DISTRICT, 2ND SECTION,
CITY OF ALPHARETTA, FULTON COUNTY, GEORGIA

SHEET NO. 2/3

DRAWING# TM 25-082

TerraMark Geospatial
Phone No. (770) 421-1927
www.TerraMark.com
C. O. A.# LSF000810
TerraMark Land Surveying, Inc.
1396 Bells Ferry Road
Marietta, Georgia 30066

No	Revision	Date
#1		
#2		
#3		
#4		
#5		
#6		
#7		
#8		

Project No:	2025-082
Survey Crew:	AA
Drawn By:	NEC
Approved By:	PBC
Date:	05/21/2025
Scale:	1"=30'
PATH:	S:\2024\2312\2023-2025-082\DWG\B-TOPO

JOB NUMBER 2025-082 PLOT SIZE 24 X 36

THIS BLOCK RESERVED FOR THE CLERK OF THE SUPERIOR COURT.

MATCHLINE, SHEET 2 SHEET 3

APPROXIMATE L.L.L.

BENCH MARK #1
ELEV: 1029.89
BOLT BETWEEN CITY AND STATE

BENCH MARK #2
ELEV: 1036.16
BOLT BETWEEN CITY AND STATE

BROOKSIDE PARKWAY
(APPARENT 80' R/W)

FIVE STORY CONCRETE (3650 BROOKSIDE PARKWAY) BUILDING HEIGHT= 67.83' +/- AREA= 26,464 SQ. FT.@ GROUND LEVEL

FFE1037.25

FFE1037.92

OVERHEAD BUILDING LINE (TYPICAL)

BUILDING LINE @ GROUND LEVEL

EQUIPMENT SHELTER EASEMENT & CONDUIT DB. 48044 PG. 116

APPROXIMATE CONDUIT LOCATION DB. 48044 PG. 116

INGRESS/EGRESS EASEMENT DB. 46905 PG. 506

UTILITY EASEMENT DB. 23303 PG. 128

WATERLINE EASEMENT DB. 46905 PG. 506 DB. 54559 PG. 676

WATERLINE EASEMENT DB. 46905 PG. 506 DB. 54559 PG. 676

GEORGIA POWER EASEMENT DB. 27394 PG. 20

SEWER EASEMENT DB. 46905 PG. 506 DB. 54559 PG. 676

DRAINAGE EASEMENT DB. 46905 PG. 506 DB. 54559 PG. 676

FF1 ALPHARETTA, LLC
N/F OWNER, LLC
PIN: 11 002000430390
DB. 63186 PG. 323

N 31°58'52" W
A=395.70'
R=395.00'
CH=380.15'

S 24°51'09" W 9.21'

S 21°41'22" E 40.5'

S 13°25'59" E 47.78'

S 15°15'45" E 149.17'

S 76°31'02" W

CAPPED RB FND "CRSLI PROP CORN"

PK NAIL FND. (0.3' N)

PK NAIL FND.

LEGEND

- CURB AND GUTTER (C&G)
- FENCE
- HANDRAIL
- STORM DRAIN LINE
- SANITARY SEWER
- WATER LINE
- GAS LINE
- UGE UNDERGROUND POWER LINE
- OVERHEAD POWER LINE
- COM COMMUNICATION
- 100 TOPOGRAPHIC CONTOUR
- PROPERTY LINE
- CATCH BASIN (DWCB)
- CATCH BASIN (SWCB)
- DROP INLET (DI)
- JB JUNCTION BOX (JB)
- HEAD WALL (HW)
- CURB INLET (CI)
- FLARED END SECTION (FES)
- OUTLET CONTROL STRUCTURE
- YARD DRAIN INLET
- SS SS MANHOLE (MH)
- CLEAN OUT (CO)
- GT GREASE TRAP (GT)
- IRRIGATION CONTROL VALVE
- FIRE HYDRANT (FH)
- WATER VALVE (WV)
- WATER METER (WM)
- FIRE DEPT. CONNECTION (FDC)
- WATER VALVE MARKER
- TX TRANSFORMER BOX (TX)
- AIR CONDITIONER (AC)
- E ELECTRIC METER (EM)
- ELECTRIC UTILITY
- LIGHT POLE (LP)
- POWER POLE WITH LIGHT
- POWER POLE (PP)
- UM UTILITY MANHOLE (UM)
- SPOTLIGHT
- G GAS METER (GM)
- GAS VALVE (GV)
- TELEPHONE PEDESTAL
- COM COMMUNICATION BOX
- TRAFFIC SIGNAL
- BOLLARD (BO)
- MB MAIL BOX
- SIGN
- CROSSWALK SIGNAL
- X 1000.00 SPOT ELEVATION
- CONCRETE AREA
- OVERHANG AREA
- RIP-RAP AREA
- BRICK AREA
- TREELINE

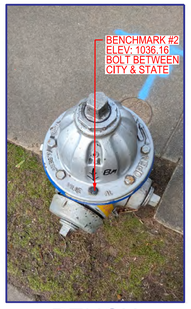
TREE LEGEND (ABBREVIATIONS)

- DECIDUOUS (TREE) — HW HARDWOOD
- CONIFEROUS (TREE)

* SEE TREE REPORT FOR TREE TAG INFORMATION



BENCH MARK #1



BENCH MARK #2

30 0 30 60 90 FT.

SCALE: 1" = 30'

AREAS OF INTEREST TABLE

(#) AREA OF INTEREST

1. SIDEWALK CROSSESS PROPERTY LINE
2. STORM LINE CROSSES PROPERTY LINE
3. ELECTRIC LINE CROSSES PROPERTY LINE
4. WATER LINE CROSSES PROPERTY LINE
5. COMMUNICATION LINE CROSSES PROPERTY LINE

ABBREVIATIONS

A	ARC LENGTH	IPS	IRON PIN SET (CAPPED)
AC.	ACRE	N/F	NOW OR FORMERLY
AE	ACCESS EASEMENT	OTP	OPEN TOP PIPE
BSL	BUILDING SETBACK LINE	PB.	PLAT BOOK
BW	BARBWIRE	PG.	PAGE
CH	CHORD LENGTH	POB	POINT OF BEGINNING
CLF	CHAIN LINK FENCE	POC	POINT OF COMMENCEMENT
CMF	CONCRETE MONUMENT FOUND	R	RADIUS LENGTH
CMP	CORRUGATED METAL PIPE	R/W	RIGHT OF WAY
CONC.	CONCRETE	R/W MON	RIGHT OF WAY MONUMENT
CTP	CRIMP TOP PIPE	RB	REBAR
DB.	DEED BOOK	RCP	REINFORCED CONCRETE PIPE
DIP	DUCTILE IRON PIPE	SDE	STORM DRAINAGE EASEMENT
FDC	FIRE DEPARTMENT CONNECTION	SQ. FT.	SQUARE FEET
FND	FOUND	SSE	SANITARY SEWER EASEMENT
HDPE	HIGH DENSITY POLYETHYLENE PIPE	WPF	WOOD PRIVACY FENCE
IPF	IRON PIN FOUND		

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ALTA/NSPS LAND TITLE SURVEY
FOR
PORTMAN HOLDINGS, LLC &
FIDELITY NATIONAL TITLE INSURANCE COMPANY
(3650 BROOKSIDE PARKWAY SITE)
LOCATED IN
LAND LOTS 43 & 44, 1ST DISTRICT, 2ND SECTION,
CITY OF ALPHARETTA, FULTON COUNTY, GEORGIA

SHEET NO.
3/3
DRAWING# TM 25-082

Statement of Intent

Statement of Intent

Proposed Redevelopment of 3650 Brookside Pkwy
December 1, 2025

Applicant:

Portman Holdings, LLC
C/O Mike Greene
303 Peachtree Center Ave NE #575
Atlanta, Georgia 30303

Subject Property:

Address	3650 Brookside Pkwy Alpharetta, GA 30022
Parcel Data	Parcel ID: 11 0020000302999 Land Lots 43 & 44 1st District, 2nd Section, City of Alpharetta
Acreage	8.7676

Current Zoning:

Zoning District	Office-Institutional
Master Plan Ordinance	MP-97-06-Brookside / Pod "A"
Future Land Use Designation	Corporate Office

Current Use:

The Subject Property is located within the 84-acre Pod "A" of the Brookside Master Plan. The Subject Property is improved with a 5-story, Class "B", 130,828 SF multi-tenant office building with 597 surface parking spaces built in 2001. The Subject Property is 84% vacant.



The Subject Property has access to and from Brookside Parkway via two full access curb cuts (one of which is shared via recorded access easement with the adjacent Mansions Senior Living residential community).

Intended Project:

Applicant seeks to develop a 104-unit residential development consisting of for-sale townhouses. These rear entry townhouse buildings will contain individual units of 18-foot, 20-foot, and 22-foot widths providing enhanced front elevations over standard townhomes. Residents of the development will enjoy the following amenities: pool with cabana, access to local retail and restaurants along the Old Milton Parkway corridor, and access to greenspaces in the Brookside including the Brookside Park trail system. Parking will be provided with a 2-car garage per townhome unit with 2 cars parking in the driveway. Additionally, there will be 43 guest parking spaces in the community. The community may have gated, private streets.

The Intended Project is to be developed generally in accordance with the attached Concept Plan. The Applicant will replace the northern full access driveway with a right in/right out driveway on Brookside Parkway. The southern, shared driveway will remail full access. Applicant intends to work with the City in effectuating improvements to Brookside Pkwy as contemplated by the Brookside Small Area Plan.

Applicant's Request:

- Amend the Brookside master plan ordinance, MP-97-06, to permit residential uses within Pod "A" in accordance with the provisions of Unified Development Code Sec. 2.2.10 "R-10M dwelling, 'for rent' or 'for sale', residential";
- Rezone the Subject Property from OI to R-10M with a permissible density of up to 10 units per acre within Pod "A";
- Amend the Horizon 2040 Comprehensive Plan Future Land Use Map designation for the Subject Property from CO to HDR; and
- Approve concurrent variances and waivers as requested herein.

Supporting Narrative:

Applicant seeks to acquire the Subject Property and demolish the current office building and surface parking lot in order to develop the Intended Project. There is very little demand for the Subject Property in its current use as a Class "B", poorly-amenitized, surface-parked, suburban office building. In contrast, municipalities such as Alpharetta are finding it difficult to balance the demand for additional housing in their communities, and the need for more varied and diverse housing options sought by households today, against their own planning goals and objectives.

The Intended Project uniquely "threads the needle" in this case by replacing a broken use with much needed additional housing on the east side of Old Milton in a location which already includes denser housing options, and which will not impact existing, more "traditional", less dense housing whose stakeholders often seek "protected" status. In doing so, the Intended Project achieves many of the goals already expressed by the City in its 2040 Horizon Comprehensive Plan and the Brookside Small Area Plan. In addition, it is Applicant's belief – again, consistent with the City's own vision statements – that the Intended Project will

~ provide the type of housing within walking or biking distance that is often in demand by office users today, thereby supporting, in part, the remaining office space and future redevelopment within Brookside;

~ locate households (not just Senior Living households) within Brookside which will actively support the planned and existing, well-occupied, retail and restaurants in proximity on Old Milton Pkwy; and

~ provide impetus for bicycle and pedestrian improvements on Brookside Pkwy which will will in turn improve the overall long-term viability of the Brookside Small Area, increase utilization of the City's green assets in the vicinity, and promote further capital investment / redevelopment on the east side of Old Milton Pkwy.

Background

The Subject Property is located within the 155-acre "Brookside" master plan adopted in 1997 and developed primarily in the 2000's, ultimately reaching 909,000 SF of office space in 14 office buildings. Brookside is in many ways a typical suburban office campus of this vintage – stand-alone buildings with little or no connectivity to

one another with little or no campus amenities. In fact, the very design of these types of office campuses ensures this lack of connectivity and walkability. Office buildings are placed "deep" on their respective sites, with surface parking lots "intervening" between the actual human use and the connecting streetscapes. In the case of Brookside, fully 1/3rd of the developed land, 57.3 acres, is dedicated to asphalt, surface parking lots, and those lots, in turn, result upwards of 200' setbacks for buildings from streetscapes, completely disconnecting human use and scale within the campus.

Suburban office campuses such as Brookside are among the hardest hit by the changes affecting office utilization in our nation since the COVID pandemic of 2020 – 22. The office vacancy within Brookside has increased in recent years. These rising vacancy levels certainly raise the specter of a "doom loop" occurring within Brookside, potentially negatively affecting the built environment experiences not only for the remaining office space within Brookside, but also the Georgia State Alpharetta campus, Northpoint church, and the retail / restaurant establishments along Old Milton Parkway. Projects such as The Providence Group's Brookside Reserve project of 160 "for sale" condominiums and Portman's Brookside Village project of 130,000 square feet of office, 60,000 square feet of retail & restaurant, 75 townhomes, and 335 multifamily units, and this application's proposed 104 townhomes provide a remedy to the suffering office market while supporting one another and improving the whole of Brookside.

This Application will not attempt to delineate the many, and complex, cultural and demographic trends which have affected commercial real estate, household formation and housing choices post-pandemic other than to note that those changes are now commonly accepted as secular, not cyclical. Some of these paradigm shifts were evident even before the the pandemic: the advent of e-commerce, the efficiencies of "paperless" and "virtual" business activity, the delay in marriage and childbearing, the increasing prevalence of "single person" households, the advent of town center nodes, the desire for walkable, connected, small-scale environments.

Horizon 2040 Comp. Plan

The City was early in recognizing these changes and in adopting planning principles in response as vision statements and guidance to the development community. The first and most comprehensive of those vision statements is the Horizon 2040 Comprehensive Plan (the "Comp. Plan").

The Comp. Plan specifically identifies the East Side of Old Milton Parkway as a "Priority Area" for redevelopment with a focus on creating a mix of uses, including new residential housing and improved streetscapes / pedestrian environments (pg. 59). Of particular note is the following:

Housing (pg. 34)

- Redevelop large surface parking lots in North Point and suburban office areas with residential uses;

- Diversify housing opportunities;
- Address missing housing types / price points; and
- Create walkable neighborhoods.

Needs & Opportunities – Office & Retail Vacancies (pg. 35)

- Develop a plan to deal with office and retail vacancies; and
- Vacancies provide an opportunity for re-use or redevelopment;

Needs & Opportunities – Growth Management (pg. 35)

- Limit expansion of retail uses;
- Decline of suburban office provides opportunity to retrofit or redevelop; and
- Improve walkability and connectivity along the Old Milton Parkway corridor east of Georgia 400.

Brookside Small Area Plan

Adopted within the Comp. Plan is the Brookside Small Area Plan, a specific planning statement issued by City Council in November of 2022 (the "Brookside Plan"). The Brookside Plan notes many of the issues raised above and seeks to promote change through many of the strategies expressed in the Comp. Plan.

The Intended Project has been designed to achieve the goals of the Small Area and the Comp. plan by introducing new dense housing adjacent to the existing dense, Senior Living housing provided at The Mansions, the planned Portman mixed-use project across Brookside Parkway to the west, improve streetscapes and pedestrian experiences, and replace asphalt parking lots with desirable development and greenspaces.

Standard of Review

The Unified Development Code (the "UDC") establishes the following criteria for use in evaluating and taking action on a Rezoning request (see generally Sec. 4.2.3). For the reasons stated herein, the Intended Project satisfies each criteria.

- <u>Will the Intended Project be compatible with surrounding properties?</u>

  Applicant's Response – Yes.

  Although the Subject Property is located within Brookside office campus, the reality is that the Subject Property is already surrounded by a mix of diverse, but complementary, uses . . . including both for-sale and for-rent housing. The Intended Project will integrate well into this existing development fabric.

  East: The Mansions at Alpharetta, a 124-unit Senior Living housing community constructed in 2016.

North: The Subject Property is bounded to the north by two parcels fronting Old Milton Pkwy. These parcels contain retail and restaurant uses. Located across Old Milton Pkwy, immediately opposite the Subject Property are more retail and restaurant uses.

West: Located to the west across Brookside Parkway are two office buildings that have been approved for a mixed-use development to be executed by Portman Holdings.

South: The Subject Property is bounded to the south by Brookside Pkwy. Located across Brookside Pkwy, opposite the Subject Property to the south is Georgia State University's Alpharetta campus.

- Will the Intended Project adversely affect the use or usability of surrounding properties?

  Applicant's Response – No.

  The Intended Project will have a positive effect on the value of surrounding properties. The Intended Project represents a significant investment within a suburban office campus which is currently 16% occupied and facing continuing financial failure and the potential for entering a "doom loop". The Intended Project will ultimately locate 104 new households in the very center of the Brookside and its surrounding uses. In doing so, the Intended Project will introduce much needed "24-hour" human presence along Brookside Pkwy, supporting the office, commercial, and retail uses and reinvigorating pedestrian presence and activity.

- Will the Intended Project adversely affect the natural environment?

  Applicant's Response – No.

  The Intended Project will, consistent with the goals of the Brookside Small Area Plan, replace 8+ acres of impervious asphalt parking with planned development providing current, code-compliant practices for stormwater management and tree cover.

- Are there substantial reasons the Subject Property cannot or should not be used as currently zoned? Are there new or changing conditions (not anticipated or reflected in the current zoning) which support the Applicant's Request.

  Applicant's Response – Yes.

  The Subject Property must be redeveloped with a new use which will meet the needs of households seeking higher density / "infill" housing options within Alpharetta. In doing so Applicant believes households seeking to live in the

Intended Project will, in turn, provide support for other current commercial, office and retail uses along Milton Pkwy without negatively impacting existing stakeholders.

- Would the Intended Project be an excessive or burdensome use of public facilities or services?

Applicant's Response – No.

Utilities and other City services exist in sufficient capacity to serve the Intended Project. In addition, while the Intended Project is not designed for or targeted at households with school-age children (SF's, amenities, etc.), it appears that Fulton County public school capacity is well below full utilization for this location:

ES: GADOE capacity for New Prospect Elementary is 825 students; enrollment is projected to be 440 students for the 2025/2026 school year.

MS: GADOE capacity for Webb Bridge Middle School is 1,150 students; enrollment is projected to be 1,197 students for 2025/2026. It is likely that Fulton County will redraw this school district since the next closest middle school, Taylor Road, is significantly under its GADOE capacity (1,400 capacity / 1,146 projected enrollment).

HS: GADOE capacity for Alpharetta High School is 2,200 students; enrollment is projected to be 1,840 for 2025/2026.

Capacity data from Fulton County Historical and Projected Enrollment: https://go.boarddocs.com/ga/fcss/Board.nsf/files/BYPM6459A7B8/$file/Historical%20and%20Projected%20Enrollment.pdf)

The Applicant is submitting a Trip Generation Memo with this application demonstrating no excessive or burdensome impacts on the surrounding roadways.

- Does the Applicant's Request reflect a reasonable balance between the promotion of public health, safety, morality or general welfare against the right to unrestricted use of the property?

Applicant's Response – Yes.

The Intended Project has been conceived in response to changing economic and cultural conditions affecting the Subject Property's current use and has been designed with the goals of the Brookside Small Area Plan in mind.

- Is the Intended Project consistent with Alpharetta's Comprehensive Plan?

Applicant's Response – Yes, but a FLUM amendment is required.

The Intended Project is consistent with explicit, on-point policies and strategies of the 2040 Horizon Comprehensive Plan, including

~ the provisions of the Brookside Small Area Plan, which are incorporated into the Comprehensive Plan (pg. 62).

~ "Promote and encourage residential densities and designs that ensure varied living areas and housing types." (Community Housing Vision Policy, pg. 40).

~ "Promote redevelopment of highway corridors, with an emphasis on North Point Pkwy, Old Milton Pkwy and South Main Street, into pedestrian-friendly, mixed-use environments to create viable, growing and attractive areas" (Community Land Use Vision Policy, pg. 46).

~ "Allow mixed use patterns that will create activity nodes . . . within exiting suburban office; "[a]llow mixed use patterns that will create activity nodes in appropriate areas . . . that provide jobs and services with walking distance of residences, preserve open spaces and make public transportation more effective" and and "[e]ncourage creative urban design solutions that improve physical character" (Community Land Use Policies 2.3, 8.2, and 10, pgs. 46-47).

However, to effectuate these goals Applicant is requesting a FLUM amendment to change the Subject Property's use designation from CO to HDR. The Applicant's request is also compatible with other land use designations in the area. As an example, The Providence Group's Brookside Reserve project at 3750 Brookside Parkway is designated as HDR.

Small Area Plan Priority

Applicant requests that the following design guidelines contained within the Brookside Small Area Plan be given precedence and priority over the conflicting guidelines contained within in the UDC.

- Front Yard Minimum Setback: 20' along Brookside Pkwy as provided in the Brookside Small Area Plan instead of 35' as set forth in UDC Sec.2.2.10D.

Variances & Waivers

Applicant requests the following variances and waivers. Each requested variance or waiver meets the following approval criteria for the reasons stated below:

(1) There are extraordinary and exceptional conditions pertaining to the Subject Property resulting from its size, shape, and topography;

(2) The Application of the Zoning Code without the requested variance or waiver would create an unnecessary hardship;

(3) There are conditions relevant to the Subject Property which are peculiar to it;

(4) And those conditions are not the result of any actions of the Applicant or current property owner; and

(5) Relief, if granted, will not cause substantial detriment to the public good nor impair the purposes or intent of applicable Zoning Code or other code provisions.

- Setback/ UDC Sec. 2.2.10.d
  The Applicant seeks to allow a 20-foot setback along Brookside Parkway pursuant to the small area plan.

- Buffer/ UDC Sec. 3.2.8.B.1.a
  The Applicant seeks to provide a 15-foot planted buffer in lieu of the 50-foot undisturbed buffer along the property lines bordering O-I and C-2 districts to allow grading and construction of the townhomes. The parcels to the east and north of the Subject Property are currently developed with a mix of restaurant/retail (north) and senior residential (east). To mitigate any impacts from the disturbance and reduction in width the Applicant will be providing additional landscaping to screen and buffer the proposed residences against the adjacent property.

- Unit Width/ UDC Sec. 2.2.10.d
  The Applicant seeks to reduce the minimum unit width from 20-feet to 18-feet to allow an enhanced front elevation to the overall townhome building.

- Parking/ UDC Sec. 2.5.4
  The Applicant seeks to reduce the minimum parking requirements for each townhome unit to be met within the associated garage and driveway.

Preservation of Rights:

The Applicant respectfully submits that the existing zoning and land use designation on the Subject Property and any intervening designation except for that requested, are unconstitutional and that a refusal to approve the proposed - rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would be unlawful, arbitrary, capricious, irrational and a manifest abuse of discretion; all in violation of the Fifth Amendment and Fourteenth Amendment of the Constitution of the United States, and Article I, Section I, Paragraph I and Article I, Section III, Paragraph I of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would discriminate unfairly between the owner of the Subject Property and other property owners similarly situated, in violation of the Fifth Amendment and Fourteenth Amendment of the Constitution of the United States, and Article I, Section I, Paragraph II of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would amount to a taking of property, in violation of the Fifth Amendment and Fourteenth Amendment of the Constitution of the United States, and Article I, Section I, Paragraph I and Article I, Section III, Paragraph I of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would be unjustified from a fact-based standpoint and instead would result only from constituent opposition, which would be an unlawful delegation of authority in violation of Article IX, Section II, Paragraph IV of the Constitution of the State of Georgia.

A refusal to approve the proposed rezoning, comprehensive land use amendment, master plan amendment and concurrent variances, or any attempt to rezone or change the comprehensive land use designation of the Subject Property to an intervening classification, would be invalid inasmuch as the City of Alpharetta Zoning Ordinance is unlawful, null and void because its adoption and map adoption/maintenance did not and does not comply with the requirements of its predecessor ordinance and/or the Zoning Procedures Law, O.C.G.A. § 36-66-1, et seq. and the Georgia Planning Act, §§ 45-12-200, et seq., and 50-8-1, et seq. The City of Alpharetta Zoning Ordinance lacks adequate standards for the City Council to exercise their powers to review this Application. Specifically, the “criteria” are not sufficient to contain the discretion of the City Council and to provide the Courts with a reasonable basis for judicial review. Because the stated standards (individually and collectively) are too vague and uncertain to provide reasonable guidance, the Zoning Ordinance is unlawful and violates, among other things, the Fifth Amendment and Fourteenth

Amendment of the Constitution of the United States and Article I, Section I, Paragraphs I and II of the Constitution of the State of Georgia.

Any limitation on the time for presentation of the issues before the City Council, which has the power to zone and rezone property, is a violation of the guarantees of free speech under the First Amendment of the Constitution of the United States and Article I, Section I, Paragraph V of the Constitution of the State of Georgia. Further, said limitations are in violation of the right to petition and assemble, in violation of the First Amendment of the Constitution of the United States and Article I, Section I, Paragraph IX of the Constitution of Georgia, as well as the due process clauses of the United States and Georgia Constitutions.

Opponents to this request lack standing, have failed to exhaust administrative remedies, and have waived their rights to appeal by failing to assert legal and constitutional objections..

Public Participation Plan

CITIZEN PARTICIPATION FORM - PART A

This form must be completed and submitted with the applicant's completed Public Hearing Application. Applications submitted to the City of Alpharetta without a completed Citizen Participation Form - Part A will not be accepted.

Public Hearing or Project Name: 3650 Brookside Pkwy

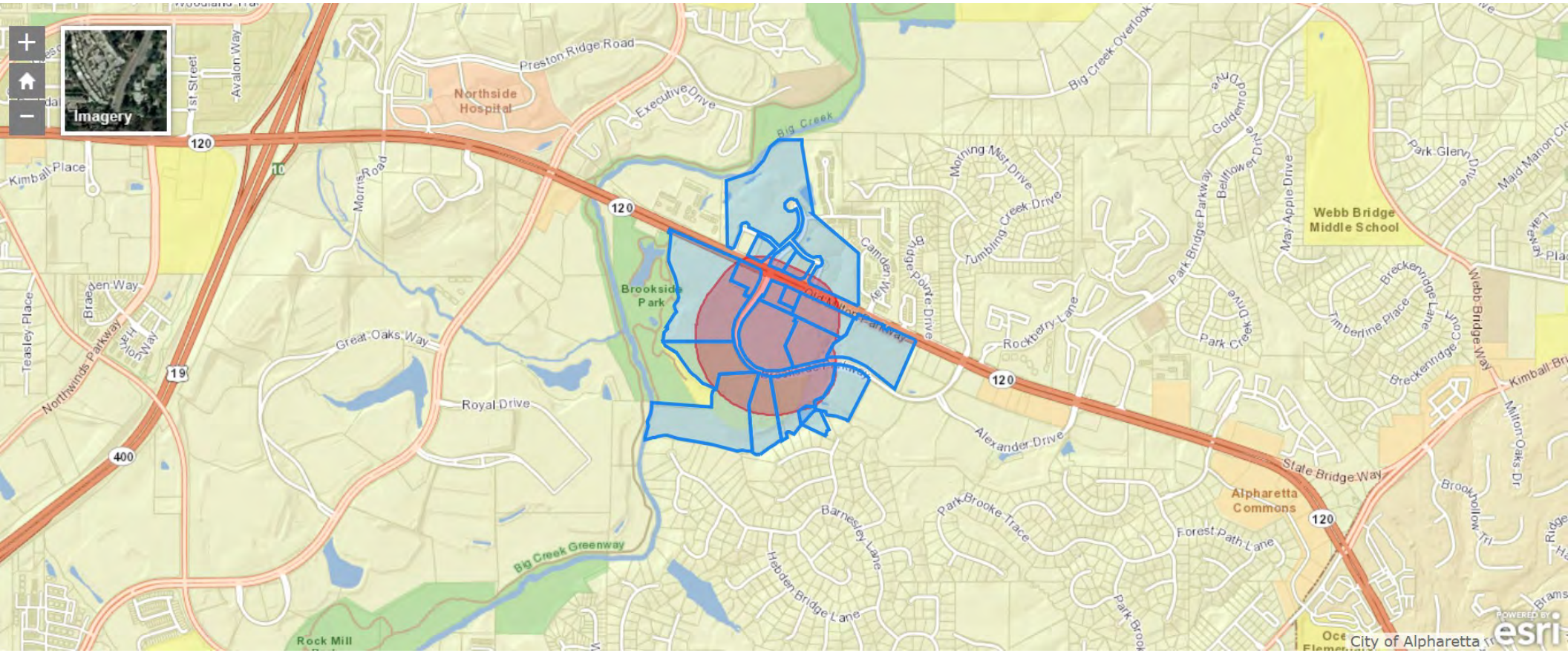
Contact Name: Clint Walters Telephone: 404-274-4492

The following people will be notified of this application and provided information describing the subject proposal. Please note that ALL adjoining property owners MUST be notified. Use additional pages as needed.

Method by which these individuals will be contacted. Please mark all that apply. *If you select "Other," please provide a description of the method of contact that will be used.*

- [x] Letter
- [ ] Personal Visits
- [ ] Telephone
- [ ] Group Meeting
- [ ] Email
- [ ] Other *(Please Specify)*

Please describe the method(s) by which these individuals will have the opportunity to respond or contact the applicant with questions or concerns about the proposal.


Imagery
Preston Ridge Road
Northside Hospital
Executive Drive
Big Creek
Big Creek Overlook
Goldenrod Drive
Bellflower Drive
Park Glenn Drive
Maid Marion Cir
Morning Mist Drive
Tumbling Creek Drive
Webb Bridge Middle School
Park Bridge Parkway
May Apple Drive
Webb Bridge Way
Kimball Place
Morris Road
120
10
Brookside Park
Camden Way
Bridge Pointe Drive
Rockberry Lane
Park Creek
Timberline Place
Breckenridge Lane
Breckenridge Court
Kimball Bridge
Milton Oaks Dr
Brookhollow Trl
Teasley Place
Braeden Way
Northwinds Parkway
Great Oaks Way
19
400
Royal Drive
Alexander Drive
State Bridge Way
Alpharetta Commons
Barnesley Lane
Park Brooke Trace
Forest Path Lane
Habden Bridge Lane
Big Creek Greenway
Rock Mill
City of Alpharetta
esri

PSC HOLDINGS ALPHARETTA LLC
11745 BENTHAM CT
ALPHARETTA GA 30005

SWNC ASPEN STATION LLC
1616 2ND AVE S STE 100
BIRMINGHAM AL 35233

HWY 120 SENIOR HOLDINGS LLC
171 STONEBRIDGE BLVD
EDMOND OK 73013

FFI ALPHARETTA IL OWNER LLC
200 W MADISON STE 2650
CHICAGO IL 60606

BOARD OF REGENTS OF THE
UNIVERSITY SYSTEM OF GEORGIA
270 WASHINGTON ST SW
ATLANTA GA 30334

BOARD OF REGENTS OF THE
UNIVERSITY SYSTEM OF GEORGIA
270 WASHINGTON ST SW STE 6122
ATLANTA GA 30334

LOYALTY OLD MILTON PROPERTY LLC
3324 PEACHTREE RD # 3005
ATLANTA GA 30326

TOUCHMARK NATIONAL BANK
3651 OLD MILTON PKWY
ALPHARETTA GA 30005

CH RETAIL FUND II ATLANTA
OLD MILTON FESTIVAL LLC
3819 MAPLE AVE
DALLAS TX 75219

PLUSKOTA MICHELLE LOUISE
& PLUSKOTA JOHN
470 GARRICK PT
ALPHARETTA GA 30022

3750 BROOKSIDE LLC
6400 POWERS FERRY RD SUITE 150
ATLANTA GA 30339

BOF II GA BROOKSIDE LLC
FIVE CONCOURSE DR SUITE 3100
ATLANTA GA 30328

FOAMWORKS ALPHARETTA LLC
P O BOX 368
ROSWELL GA 30077

GOETHE JANET
P O BOX 813068
SMYRNA GA 30081

JD LD ATLANTA LLC
P.O. BOX 7555
REDLANDS CA 92375-0555

Proof of Paid Taxes

Real Estate

View Bill

As of	11/25/2025
Bill Year	2025
Bill	2500133
Owner	JD LD ATLANTA LLC
Parcel ID	11 -0020-0003-029-9

Installment	Pay By	Amount	Payments/Credits	Balance	Interest	Due
1	12/1/2025	$23,805.00	$23,805.00	$0.00	$0.00	$0.00
TOTAL		$23,805.00	$23,805.00	$0.00	$0.00	$0.00

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Detailed Tax Summary

Tax Year: 2025

Owner Name	Parcel Identification	Account Number
JD LD ATLANTA LLC	11 002000030299	5635449

Property Location	Tax District
3650 BROOKSIDE PARKWAY	10 - ALPHARETTA

Fair Market Value	Assessed Value	Temporary Assessment
10,350,000	4,140,000	4,140,000

City Exemption

County Exemption

Levies	Assessment	Exemptions	Net Assessment		Net Rate	State Credit	TAX
Fulton Cycle							
FULTON BONDS	4,140,000.00	0.00	4,140,000.00	X	.000169	$0.00	$699.66
FULTON OPER	4,140,000.00	0.00	4,140,000.00	X	.008870	$0.00	$36,721.80
FULTON SCHOOL GEN	4,140,000.00	0.00	4,140,000.00	X	.017080	$0.00	$70,711.20
INTEREST							$0.00
PENALTIES/FEES							$0.00
Last Payment: 9/16/2025			**Total Amount Billed**				$108,132.66
			Less Amount Paid				$108,132.66
			Total Due				$0.00

Property owners with current legal matters, such as bankruptcy or foreclosure, must contact the Tax Commissioner's office at 404.613.6100 for the official balance due on their parcel(s).

Evidence of No Code Enforcement Violations

Filters

Code Enforcement

Filters | Styling

Filter as map moves

Location

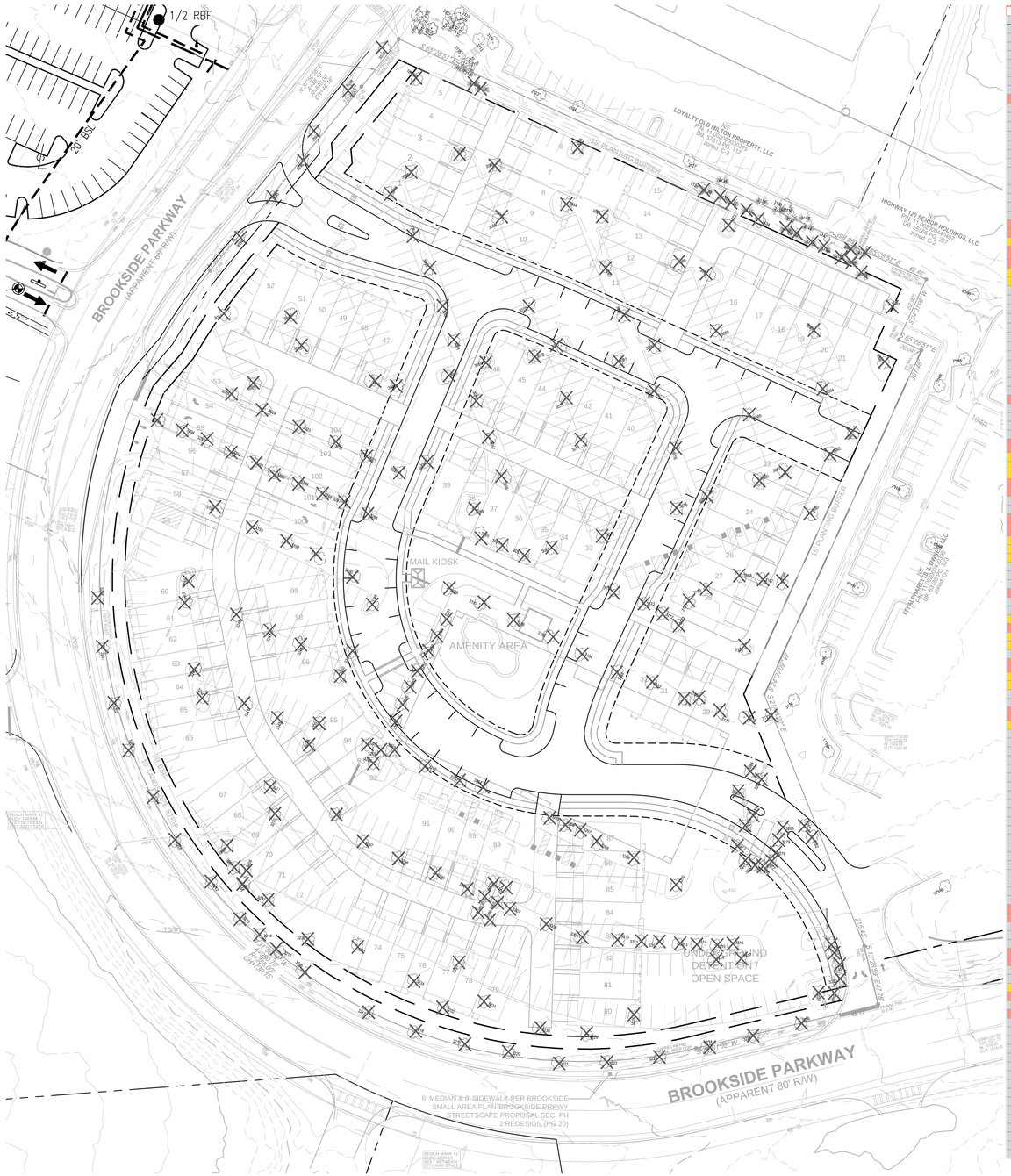
3650 brookside pkwy

Select attribute filters (13)

- Type Description — Values: 4
- Number — Values: 186
- Tag — Values: 132
- Status Code — Values: 1
- Assigned To — Values: 2
- Initiated Date

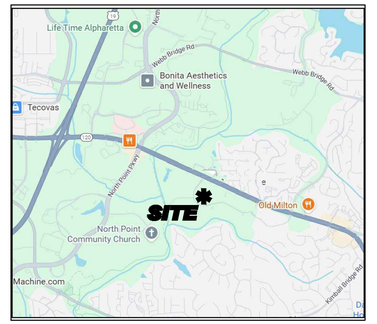


Trees



3650 Brookside Parkway Tree Assessment

Tag Number	DBH	Species	Common Name	Condition	Notes
3019	14	Acer rubrum	Red maple	Good	
3020	14	Acer rubrum	Red maple	Good	
3021	13	Acer rubrum	Red maple	Good	
3022	12	Acer rubrum	Red maple	Good	
3023	14	Acer rubrum	Red maple	Good	
3024	18	Acer rubrum	Red maple	Good	
3025	22	Acer rubrum	Red maple	Good	
3026	16	Prunus sp.	Flowering cherry	Good	
3027	15	Prunus sp.	Flowering cherry	Poor	Dieback in canopy
3028	10	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/3/3
3029	9	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/3/2
3030	11	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/4/3
3031	10	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 5/3/2
3032	10	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 4/3/3
3033	29	Quercus phellos	Willow oak	Good	
3034	20	Quercus phellos	Willow oak	Good	
3035	23	Quercus phellos	Willow oak	Good	
3036	14	Quercus phellos	Willow oak	Good	
3037	23	Quercus phellos	Willow oak	Good	
3038	23	Quercus phellos	Willow oak	Good	
3039	30	Quercus phellos	Willow oak	Good	
3040	18	Quercus phellos	Willow oak	Good	
3041	15	Quercus phellos	Willow oak	Poor	Dieback in canopy
3042	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3043	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3044	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback and mistletoe in canopy
3045	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3046	8	Ulmus parvifolia	Chinese elm	Good	Invasive species
3047	5	Ulmus parvifolia	Chinese elm	Good	Invasive species
3048	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5
3049	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5
3050	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5
3051	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5
3052	17	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 7/5/5
3053	12	Ilex 'Emily Bruner'	Emily Bruner Holly	Fair	Chlorotic foliage
3054	14	Ilex 'Emily Bruner'	Emily Bruner Holly	Good	
3055	10	Ilex 'Emily Bruner'	Emily Bruner Holly	Good	
3056	19	Acer rubrum	Red maple	Good	
3057	14	Acer rubrum	Red maple	Good	
3058	14	Acer rubrum	Red maple	Good	
3059	13	Acer rubrum	Red maple	Good	
3060	11	Acer rubrum	Red maple	Poor	Dieback in canopy
3061	13	Acer rubrum	Red maple	Good	
3062	13	Acer rubrum	Red maple	Good	
3063	12	Acer rubrum	Red maple	Good	
3064	14	Acer rubrum	Red maple	Good	
3065	10	Ulmus parvifolia	Chinese elm	Poor	Invasive species; damage and dieback in trunk and canopy
3066	9	Ulmus parvifolia	Chinese elm	Good	Invasive species
3067	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3068	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3069	6	Acer rubrum	Red maple	Poor	Dieback in trunk and canopy
3070	7	Acer rubrum	Red maple	Poor	Decay in trunk; dieback in canopy
3071	7	Acer rubrum	Red maple	Fair	Light dieback in canopy
3072	7	Acer rubrum	Red maple	Good	
3073	6	Acer rubrum	Red maple	Poor	Trunk wound with decay
3074	6	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy
3075	6	Ulmus parvifolia	Chinese elm	Good	Invasive species; light dieback in canopy
3076	9	Ulmus parvifolia	Chinese elm	Good	Invasive species
3077	11	Ulmus parvifolia	Chinese elm	Good	Invasive species
3078	15	Acer rubrum	Red maple	Good	
3079	13	Acer rubrum	Red maple	Good	
3080	26	Quercus phellos	Willow oak	Good	
3081	10	Acer rubrum	Red maple	Poor	Dieback in canopy
3082	13	Acer rubrum	Red maple	Good	
3083	15	Acer rubrum	Red maple	Good	
3084	10	Ulmus parvifolia	Chinese elm	Good	Invasive species
3085	12	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3086	9	Ulmus parvifolia	Chinese elm	Good	Invasive species
3087	9	Ulmus parvifolia	Chinese elm	Good	Invasive species
3088	6	Acer rubrum	Red maple	Fair	Light dieback in canopy
3089	7	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy
3090	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3091	10	Ulmus parvifolia	Chinese elm	Good	Invasive species
3092	10	Acer saccharum	Sugar maple	Good	
3093	9	Acer saccharum	Sugar maple	Good	
3094	9	Acer rubrum	Red maple	Poor	Trunk wound with decay; dieback in canopy
3095	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3096	9	Acer saccharum	Sugar maple	Good	
3097	8	Acer saccharum	Sugar maple	Good	
3098	16	Quercus phellos	Willow oak	Good	
3099	20	Quercus phellos	Willow oak	Good	
3100	11	Cryptomeria japonica	Cryptomeria	Good	
3101	10	Cryptomeria japonica	Cryptomeria	Good	
3102	11	Cryptomeria japonica	Cryptomeria	Good	
3103	8	Cryptomeria japonica	Cryptomeria	Good	
3104	8	Cryptomeria japonica	Cryptomeria	Good	
3105	11	Cryptomeria japonica	Cryptomeria	Good	
3106	9	Cryptomeria japonica	Cryptomeria	Good	
3107	9	Cryptomeria japonica	Cryptomeria	Good	
3108	6	Acer buergerianum	Trident maple	Fair	Suppressed canopy
3109	8	Cryptomeria japonica	Cryptomeria	Good	
3110	8	Cryptomeria japonica	Cryptomeria	Good	
3111	9	Cryptomeria japonica	Cryptomeria	Good	
3112	10	Cryptomeria japonica	Cryptomeria	Good	
3113	11	Cryptomeria japonica	Cryptomeria	Good	
3114	9	Zelkova serrata	Zelkova	Good	
3115	15	Pinus taeda	Loblolly pine	Good	
3116	12	Pinus taeda	Loblolly pine	Poor	Fusiform rust canker on trunk
3117	10	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy
3118	5	Liquidambar styraciflua	Sweetgum	Good	
3119	7	Liquidambar styraciflua	Sweetgum	Good	
3120	23	Pinus taeda	Loblolly pine	Good	
3121	7	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy
3122	17	Pinus taeda	Loblolly pine	Poor	Fusiform rust canker on lower trunk
3123	20	Quercus phellos	Willow oak	Good	
3124	20	Quercus phellos	Willow oak	Good	
3125	6	Ulmus parvifolia	Chinese elm	Good	Invasive species
3126	9	Pinus taeda	Loblolly pine	Poor	One-sided, suppressed canopy
3127	28	Quercus phellos	Willow oak	Good	
3128	17	Liriodendron tulipifera	Tulip poplar	Poor	Dieback in codominant leader
3129	16	Pinus taeda	Loblolly pine	Good	
3130	12	Pinus taeda	Loblolly pine	Good	
3131	16	Pinus taeda	Loblolly pine	Good	
3132	15	Pinus taeda	Loblolly pine	Good	
3133	13	Pinus taeda	Loblolly pine	Good	
3134	9	Liriodendron tulipifera	Tulip poplar	Good	
3135	14	Pinus taeda	Loblolly pine	Good	
3136	16	Pinus taeda	Loblolly pine	Good	
3137	14	Quercus phellos	Willow oak	Good	
3138	13	Pinus taeda	Loblolly pine	Good	
3139	14	Pinus taeda	Loblolly pine	Good	
3140	14	Pinus taeda	Loblolly pine	Good	
3141	12	Pinus taeda	Loblolly pine	Good	
3142	15	Pinus taeda	Loblolly pine	Good	
3143	14	Pinus taeda	Loblolly pine	Good	
3144	12	Pinus taeda	Loblolly pine	Good	
3145	15	Pinus taeda	Loblolly pine	Good	
3146	15	Pinus taeda	Loblolly pine	Good	
3147	11	Liriodendron tulipifera	Tulip poplar	Good	
3148	15	Pinus taeda	Loblolly pine	Good	
3149	13	Pinus taeda	Loblolly pine	Good	
3150	17	Pinus taeda	Loblolly pine	Good	
3151	14	Pinus taeda	Loblolly pine	Good	
3152	20	Pinus taeda	Loblolly pine	Good	
3153	7	Quercus lyrata	Overcup oak	Good	Boundary tree
3154	6	Quercus michauxii	Swamp chestnut oak	Good	Boundary tree
3155	11	Taxodium distichum	Bald cypress	Good	Boundary tree
3156	6	Magnolia grandiflora	Southern magnolia	Good	Boundary tree
3157	7	Magnolia grandiflora	Southern magnolia	Good	Boundary tree
3158	10	Quercus phellos	Willow oak	Good	Boundary tree
3159	6	Ulmus americana	American elm	Good	Boundary tree
3160	6	Ulmus americana	American elm	Good	Boundary tree
3161	6	Ulmus americana	American elm	Good	Boundary tree
3162	6	Ulmus americana	American elm	Good	Boundary tree
3163	6	Ulmus americana	American elm	Good	Boundary tree
3164	9	Quercus phellos	Willow oak	Good	Boundary tree
3165	14	Acer saccharum	Sugar maple	Good	
3166	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5
3167	18	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 7/6/5
3168	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5
3169	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5
3170	16	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 6/5/5
3171	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5
3172	13	Acer rubrum	Red maple	Good	
3173	7	Acer saccharum	Sugar maple	Good	
3174	11	Acer saccharum	Sugar maple	Good	
3175	27	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 10/8/8
3176	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5
3177	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5
3178	15	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/5/5
3179	13	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 5/4/4
3180	10	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 4/4/2
3181	15	Acer rubrum	Red maple	Good	
3182	15	Acer rubrum	Red maple	Good	
3183	10	Ilex x attenuata Fosteri	Foster holly	Good	
3184	8	Ilex x attenuata Fosteri	Foster holly	Good	
3185	15	Acer rubrum	Red maple	Good	
3186	13	Acer rubrum	Red maple	Good	
3187	15	Acer rubrum	Red maple	Good	
3188	16	Acer rubrum	Red maple	Good	
3189	13	Acer rubrum	Red maple	Good	
3190	15	Acer rubrum	Red maple	Good	
3191	16	Acer rubrum	Red maple	Good	
3192	16	Acer rubrum	Red maple	Good	
3193	17	Acer rubrum	Red maple	Good	
3194	16	Acer rubrum	Red maple	Good	
3195	16	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 7/5/4
3196	18	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 9/5/4
3197	14	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 5/5/4
3198	14	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 7/4/3
3199	14	Ilex x Nellie Stevens	Nellie Stevens holly	Good	Multi stem – 5/5/4
3200	24	Quercus phellos	Willow oak	Good	
3201	25	Quercus phellos	Willow oak	Good	
3202	19	Quercus phellos	Willow oak	Good	
3203	18	Quercus phellos	Willow oak	Good	
3204	22	Quercus phellos	Willow oak	Good	
3205	28	Quercus phellos	Willow oak	Good	
3206	18	Acer rubrum	Red maple	Good	
3207	4	Lagerstroemia sp.	Crape myrtle	Poor	Trunk wound with decay
3208	12	Lagerstroemia sp.	Crape myrtle	Poor	Multi stem – 4/4/4; decay in base
3209	8	Lagerstroemia sp.	Crape myrtle	Good	Multiple stem – 4/4
3210	21	Quercus shumardii	Shumard oak	Good	
3211	11	Ulmus parvifolia	Chinese elm	Good	Invasive species
3212	7	Ilex vomitoria	Yaupon holly	Good	Multi stem – 3/2/2
3213	9	Ilex vomitoria	Yaupon holly	Good	Multi stem – 3/3/3
3214	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/3
3215	16	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/5
3216	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/4
3217	32	Quercus phellos	Willow oak	Good	
3218	31	Quercus phellos	Willow oak	Good	
3219	29	Quercus phellos	Willow oak	Good	
3220	25	Quercus phellos	Willow oak	Good	
3221	27	Quercus phellos	Willow oak	Good	
3222	15	Quercus phellos	Willow oak	Good	
3223	25	Quercus phellos	Willow oak	Good	
3224	23	Quercus phellos	Willow oak	Good	
3225	18	Quercus phellos	Willow oak	Fair	Thin canopy
3226	22	Quercus phellos	Willow oak	Good	
3227	10	Ulmus parvifolia	Chinese elm	Good	Invasive species
3228	11	Acer rubrum	Red maple	Good	
3229	21	Quercus phellos	Willow oak	Good	
3230	15	Acer rubrum	Red maple	Good	
3231	15	Acer rubrum	Red maple	Good	
3232	15	Acer rubrum	Red maple	Good	
3233	17	Acer rubrum	Red maple	Fair	Light decay in pruning wound
3234	18	Acer rubrum	Red maple	Good	
3235	20	Acer rubrum	Red maple	Good	
3236	20	Acer rubrum	Red maple	Good	
3237	20	Acer rubrum	Red maple	Good	
3238	5	Ulmus parvifolia	Chinese elm	Good	Invasive species
3239	5	Ulmus parvifolia	Chinese elm	Good	Invasive species
3240	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; mistletoe on trunk; dieback in canopy
3241	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3242	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3243	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3244	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3245	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in trunk and canopy
3246	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3247	6	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3248	5	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3249	7	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3250	7	Ulmus parvifolia	Chinese elm	Good	Invasive species
3251	9	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4
3252	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/4
3253	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4/4
3254	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/4/4
3255	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4
3256	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/3
3257	14	Ilex vomitoria	Yaupon holly	Good	Multi stem – 6/5/3
3258	6	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2
3259	6	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2
3260	6	Magnolia x soulangeana	Saucer magnolia	Good	Multi stem – 2/2/2
3261	16	Acer rubrum	Red maple	Good	
3262	16	Acer rubrum	Red maple	Good	
3263	14	Acer rubrum	Red maple	Fair	Light decay in pruning wound
3264	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 6/3/3
3265	14	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 8/4/4
3266	11	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/5/3
3267	13	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 8/5/2
3268	15	Acer rubrum	Red maple	Poor	Trunk wounds with fungal fruiting bodies and decay
3269	15	Acer rubrum	Red maple	Poor	Trunk wounds and dieback in trunk
3270	21	Quercus shumardii	Shumard oak	Good	
3271	14	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3272	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3273	17	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3274	15	Cupressus x leylandii	Tulip poplar	Fair	Interior dieback; undesirable species
3275	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3276	18	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3277	14	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3278	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3279	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3280	13	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3281	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3282	12	Cupressus x leylandii	Leyland cypress	Fair	Interior dieback; undesirable species
3283	8	Ilex x attenuata Fosteri	Foster holly	Fair	Trunk wound with no decay
3284	13	Ilex x attenuata Fosteri	Foster holly	Good	Multi stem – 5/4/4
3285	10	Ilex x attenuata Fosteri	Foster holly	Good	
3286	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4
3287	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4
3288	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3
3289	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4
3290	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/4/4
3291	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3
3292	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3
3293	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 6/4/2
3294	13	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/5/3
3295	10	Juniperus virginiana	Eastern red cedar	Poor	Dieback in canopy
3296	9	Ulmus parvifolia	Chinese elm	Good	Invasive species
3297	8	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy
3298	9	Ulmus parvifolia	Chinese elm	Good	Invasive species
3299	9	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy
3300	9	Ulmus parvifolia	Chinese elm	Poor	Invasive species; dieback in canopy
3301	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2
3302	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2
3303	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2
3304	7	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/2/2
3305	7	Lagerstroemia sp.	Crape myrtle	Poor	Multi stem – 3/2/2; dieback in trunk
3306	8	Lagerstroemia sp.	Crape myrtle	Good	Multi stem – 3/3/2
3307	10	Ulmus parvifolia	Chinese elm	Good	Invasive species
3308	9	Ulmus parvifolia	Chinese elm	Good	Invasive species
3309	10	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy
3310	13	Ulmus parvifolia	Chinese elm	Fair	Invasive species; light dieback in canopy
3311	11	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/3
3312	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4
3313	15	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/5; trunk wound with no decay
3314	13	Ilex vomitoria	Yaupon holly	Good	Multi stem – 5/5/3
3315	13	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/3; trunk wounds with no decay
3316	12	Ilex vomitoria	Yaupon holly	Good	Multi stem – 4/4/4
3317	14	Ilex vomitoria	Yaupon holly	Fair	Multi stem – 5/5/4; trunk wounds with no decay
3318	13	Ulmus parvifolia	Chinese elm	Good	Invasive species
3319	12	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 5/4/3
3320	8	Ilex cornuta Burfordii	Burford holly	Fair	Multi stem – 4/2/2; light dieback
3321	8	Ilex cornuta Burfordii	Burford holly	Poor	Multi stem – 4/2/2; dieback
3322	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3
3323	10	Ilex cornuta Burfordii	Burford holly	Good	Multi stem – 4/3/3
3324	6	Cryptomeria japonica	Cryptomeria	Good	
3325	8	Cryptomeria japonica	Cryptomeria	Good	
3326	6	Cryptomeria japonica	Cryptomeria	Good	
3327	6	Cryptomeria japonica	Cryptomeria	Good	
3328	6	Acer rubrum	Red maple	Good	Boundary tree
3329	5	Liquidambar styraciflua	Sweetgum	Good	
3330	5	Liquidambar styraciflua	Sweetgum	Good	
3331	6	Magnolia grandiflora	Southern magnolia	Good	
3332	6	Magnolia grandiflora	Southern magnolia	Good	
3333	6	Magnolia grandiflora	Southern magnolia	Good	
3334	6	Magnolia grandiflora	Southern magnolia	Good	
3335	6	Magnolia grandiflora	Southern magnolia	Good	
3336	9	Quercus phellos	Willow oak	Good	Boundary tree
3337	7	Acer rubrum	Red maple	Good	Boundary tree
3338	6	Acer rubrum	Red maple	Good	Boundary tree
3339	8	Acer rubrum	Red maple	Good	Boundary tree
3340	8	Quercus nuttallii	Nuttall oak	Good	Boundary tree



VICINITY MAP
not to scale

SITE DATA:

TOTAL SITE AREA ____ 8.7676 ACRES

NOTE: TREE ASSESSMENT CONDUCTED BY BROOKWOOD TREE CONCULTING INC. ON 11/01-2024.

thePROVIDENCEgroup

Clint Walters

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Kimley»Horn

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NORTH

0 25 50 100

SCALE IN FEET

EXISTING TREE PLAN

BROOKSIDE WEST

GEORGIA REGISTERED LANDSCAPE ARCHITECT EDWARD J. ANDERSON

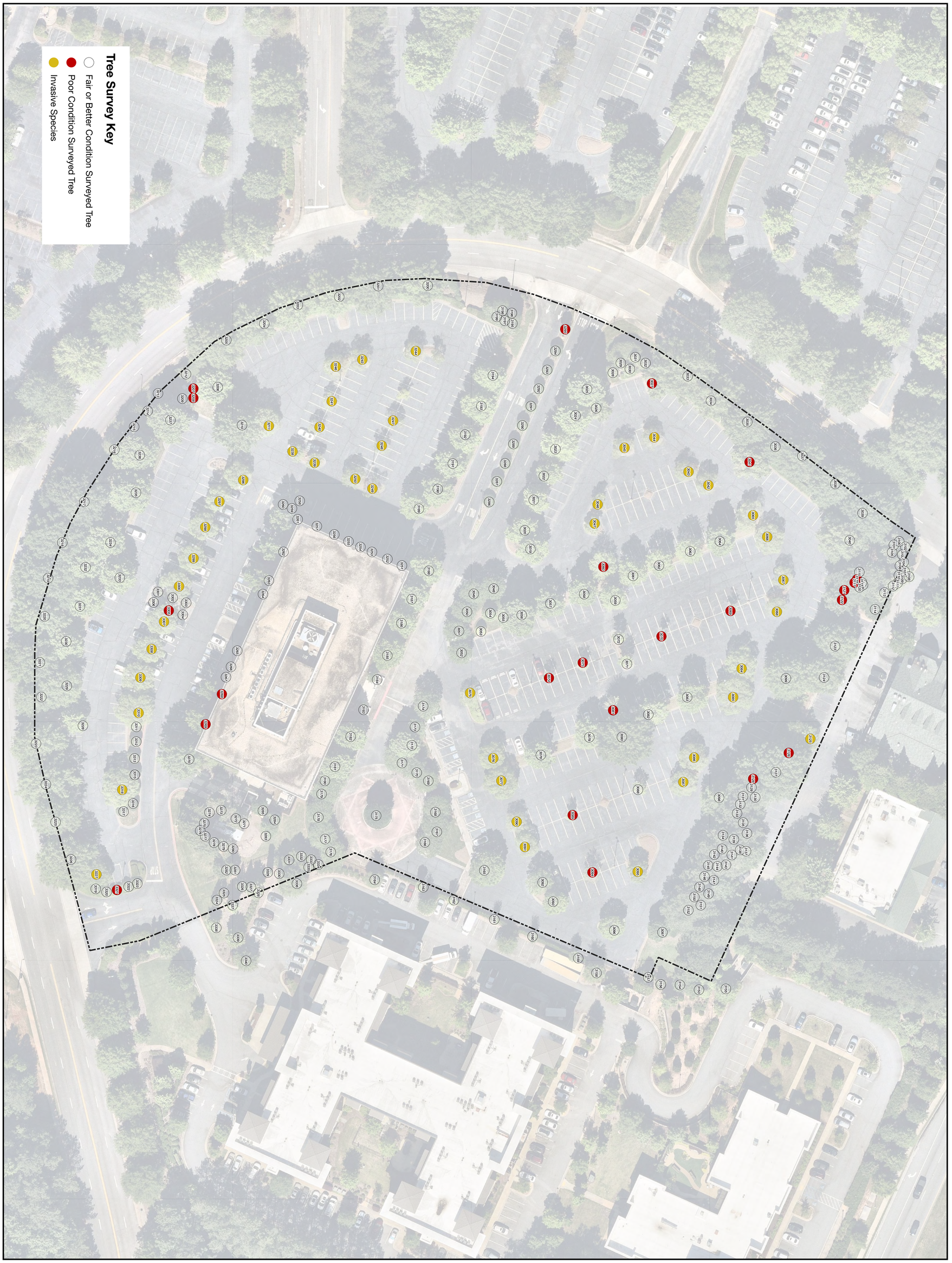
Land Lots 2, 3, and 44, 1st District
2nd Section, City of Alpharetta
Fulton County, Georgia

12/01/2025

SCALE 1" = 50'

JOB #019913084

2 of 2



3650 Brookside Parkway - Alpharetta
Tree Survey
11.1.2024

brookwood tree consulting, inc
Christian Hughes
ASCA Registered Consulting Arborist #493
ISA Certified Arborist SO-5374

3650 Brookside Parkway Tree Assessment

Tag Number	DBH	Species	Common Name	Condition	Notes
3019	14	*Acer rubrum*	Red maple	Good	
3020	14	*Acer rubrum*	Red maple	Good	
3021	13	*Acer rubrum*	Red maple	Good	
3022	12	*Acer rubrum*	Red maple	Good	
3023	14	*Acer rubrum*	Red maple	Good	
3024	18	*Acer rubrum*	Red maple	Good	
3025	22	*Acer rubrum*	Red maple	Good	
3026	16	*Prunus sp.*	Flowering cherry	Good	
3027	15	*Prunus sp.*	Flowering cherry	Poor	Dieback in canopy
3028	10	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 4/3/3
3029	9	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 4/3/2
3030	11	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 4/4/3
3031	10	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 5/3/2
3032	10	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 4/3/3
3033	29	*Quercus phellos*	Willow oak	Good	
3034	20	*Quercus phellos*	Willow oak	Good	
3035	23	*Quercus phellos*	Willow oak	Good	
3036	14	*Quercus phellos*	Willow oak	Good	
3037	23	*Quercus phellos*	Willow oak	Good	
3038	23	*Quercus phellos*	Willow oak	Good	
3039	30	*Quercus phellos*	Willow oak	Good	
3040	18	*Quercus phellos*	Willow oak	Good	
3041	15	*Quercus phellos*	Willow oak	Poor	Dieback in canopy
3042	7	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3043	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3044	7	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback and mistletoe in canopy
3045	7	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3046	8	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3047	5	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3048	16	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 6/5/5
3049	15	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 5/5/5
3050	15	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 5/5/5
3051	16	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 6/5/5
3052	17	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 7/5/5
3053	12	*Ilex 'Emily Bruner'*	Emily Bruner Holly	Fair	Chlorotic foliage
3054	14	*Ilex 'Emily Bruner'*	Emily Bruner Holly	Good	
3055	10	*Ilex 'Emily Bruner'*	Emily Bruner Holly	Good	
3056	19	*Acer rubrum*	Red maple	Good	
3057	14	*Acer rubrum*	Red maple	Good	
3058	14	*Acer rubrum*	Red maple	Good	
3059	13	*Acer rubrum*	Red maple	Good	
3060	11	*Acer rubrum*	Red maple	Poor	Dieback in canopy
3061	13	*Acer rubrum*	Red maple	Good	
3062	13	*Acer rubrum*	Red maple	Good	
3063	12	*Acer rubrum*	Red maple	Good	
3064	14	*Acer rubrum*	Red maple	Good	
3065	10	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; damage and dieback in trunk and canopy
3066	9	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3067	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3068	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3069	6	*Acer rubrum*	Red maple	Poor	Dieback in trunk and canopy
3070	7	*Acer rubrum*	Red maple	Poor	Decay in trunk; dieback in canopy
3071	7	*Acer rubrum*	Red maple	Fair	Light dieback in canopy
3072	7	*Acer rubrum*	Red maple	Good	
3073	6	*Acer rubrum*	Red maple	Poor	Trunk wound with decay
3074	6	*Acer rubrum*	Red maple	Poor	Trunk wound with decay; dieback in canopy

3075	6	*Ulmus parvifolia*	Chinese elm	Good	Invasive species; light dieback in canopy
3076	9	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3077	11	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3078	15	*Acer rubrum*	Red maple	Good	
3079	13	*Acer rubrum*	Red maple	Good	
3080	26	*Quercus phellos*	Willow oak	Good	
3081	10	*Acer rubrum*	Red maple	Poor	Dieback in canopy
3082	13	*Acer rubrum*	Red maple	Good	
3083	15	*Acer rubrum*	Red maple	Good	
3084	10	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3085	12	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3086	9	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3087	9	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3088	6	*Acer rubrum*	Red maple	Fair	Light dieback in canopy
3089	7	*Acer rubrum*	Red maple	Poor	Trunk wound with decay; dieback in canopy
3090	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3091	10	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3092	10	*Acer saccharum*	Sugar maple	Good	
3093	9	*Acer saccharum*	Sugar maple	Good	
3094	9	*Acer rubrum*	Red maple	Poor	Trunk wound with decay; dieback in canopy
3095	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3096	9	*Acer saccharum*	Sugar maple	Good	
3097	8	*Acer saccharum*	Sugar maple	Good	
3098	16	*Quercus phellos*	Willow oak	Good	
3099	20	*Quercus phellos*	Willow oak	Good	
3100	11	*Cryptomeria japonica*	Cryptomeria	Good	
3101	10	*Cryptomeria japonica*	Cryptomeria	Good	
3102	11	*Cryptomeria japonica*	Cryptomeria	Good	
3103	8	*Cryptomeria japonica*	Cryptomeria	Good	
3104	8	*Cryptomeria japonica*	Cryptomeria	Good	
3105	11	*Cryptomeria japonica*	Cryptomeria	Good	
3106	9	*Cryptomeria japonica*	Cryptomeria	Good	
3107	9	*Cryptomeria japonica*	Cryptomeria	Good	
3108	6	*Acer buergerianum*	Trident maple	Fair	Suppressed canopy
3109	8	*Cryptomeria japonica*	Cryptomeria	Good	
3110	8	*Cryptomeria japonica*	Cryptomeria	Good	
3111	9	*Cryptomeria japonica*	Cryptomeria	Good	
3112	10	*Cryptomeria japonica*	Cryptomeria	Good	
3113	11	*Cryptomeria japonica*	Cryptomeria	Good	
3114	9	*Zelkova serrata*	Zelkova	Good	
3115	15	*Pinus taeda*	Loblolly pine	Good	
3116	12	*Pinus taeda*	Loblolly pine	Poor	Fusiform rust canker on trunk
3117	10	*Pinus taeda*	Loblolly pine	Poor	One-sided, suppressed canopy
3118	5	*Liquidambar styraciflua*	Sweetgum	Good	
3119	7	*Liquidambar styraciflua*	Sweetgum	Good	
3120	23	*Pinus taeda*	Loblolly pine	Good	
3121	7	*Pinus taeda*	Loblolly pine	Poor	One-sided, suppressed canopy
3122	17	*Pinus taeda*	Loblolly pine	Poor	Fusiform rust canker on lower trunk
3123	20	*Quercus phellos*	Willow oak	Good	
3124	20	*Quercus phellos*	Willow oak	Good	
3125	6	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3126	9	*Pinus taeda*	Loblolly pine	Poor	One-sided, suppressed canopy
3127	28	*Quercus phellos*	Willow oak	Good	
3128	17	*Liriodendron tulipifera*	Tulip poplar	Poor	Dieback in codominant leader
3129	16	*Pinus taeda*	Loblolly pine	Good	
3130	12	*Pinus taeda*	Loblolly pine	Good	

3131	16	*Pinus taeda*	Loblolly pine	Good	
3132	15	*Pinus taeda*	Loblolly pine	Good	
3133	13	*Pinus taeda*	Loblolly pine	Good	
3134	9	*Liriodendron tulipifera*	Tulip poplar	Good	
3135	14	*Pinus taeda*	Loblolly pine	Good	
3136	16	*Pinus taeda*	Loblolly pine	Good	
3137	14	*Quercus phellos*	Willow oak	Good	
3138	13	*Pinus taeda*	Loblolly pine	Good	
3139	14	*Pinus taeda*	Loblolly pine	Good	
3140	14	*Pinus taeda*	Loblolly pine	Good	
3141	12	*Pinus taeda*	Loblolly pine	Good	
3142	15	*Pinus taeda*	Loblolly pine	Good	
3143	14	*Pinus taeda*	Loblolly pine	Good	
3144	12	*Pinus taeda*	Loblolly pine	Good	
3145	15	*Pinus taeda*	Loblolly pine	Good	
3146	15	*Pinus taeda*	Loblolly pine	Good	
3147	11	*Liriodendron tulipifera*	Tulip poplar	Good	
3148	15	*Pinus taeda*	Loblolly pine	Good	
3149	13	*Pinus taeda*	Loblolly pine	Good	
3150	17	*Pinus taeda*	Loblolly pine	Good	
3151	14	*Pinus taeda*	Loblolly pine	Good	
3152	20	*Pinus taeda*	Loblolly pine	Good	
3153	7	*Quercus lyrata*	Overcup oak	Good	Boundary tree
3154	6	*Quercus michauxii*	Swamp chestnut oak	Good	Boundary tree
3155	11	*Taxodium distichum*	Bald cypress	Good	Boundary tree
3156	6	*Magnolia grandiflora*	Southern magnolia	Good	Boundary tree
3157	7	*Magnolia grandiflora*	Southern magnolia	Good	Boundary tree
3158	10	*Quercus phellos*	Willow oak	Good	Boundary tree
3159	6	*Ulmus americana*	American elm	Good	Boundary tree
3160	6	*Ulmus americana*	American elm	Good	Boundary tree
3161	6	*Ulmus americana*	American elm	Good	Boundary tree
3162	6	*Ulmus americana*	American elm	Good	Boundary tree
3163	6	*Ulmus americana*	American elm	Good	Boundary tree
3164	9	*Quercus phellos*	Willow oak	Good	Boundary tree
3165	14	*Acer saccharum*	Sugar maple	Good	
3166	16	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 6/5/5
3167	18	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 7/6/5
3168	16	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 6/5/5
3169	16	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 6/5/5
3170	16	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 6/5/5
3171	15	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 5/5/5
3172	13	*Acer rubrum*	Red maple	Good	
3173	7	*Acer saccharum*	Sugar maple	Good	
3174	11	*Acer saccharum*	Sugar maple	Good	
3175	27	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 10/9/8
3176	15	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 5/5/5
3177	15	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 5/5/5
3178	15	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 5/5/5
3179	13	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 5/4/4
3180	10	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 4/4/2
3181	15	*Acer rubrum*	Red maple	Good	
3182	15	*Acer rubrum*	Red maple	Good	
3183	10	*Ilex x attenuata Fosteri*	Foster holly	Good	
3184	8	*Ilex x attenuata Fosteri*	Foster holly	Good	
3185	15	*Acer rubrum*	Red maple	Good	
3186	13	*Acer rubrum*	Red maple	Good	
3187	15	*Acer rubrum*	Red maple	Good	
3188	16	*Acer rubrum*	Red maple	Good	
3189	13	*Acer rubrum*	Red maple	Good	
3190	15	*Acer rubrum*	Red maple	Good	

3191	16	*Acer rubrum*	Red maple	Good	
3192	16	*Acer rubrum*	Red maple	Good	
3193	17	*Acer rubrum*	Red maple	Good	
3194	16	*Acer rubrum*	Red maple	Good	
3195	16	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 7/5/4
3196	18	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 9/5/4
3197	14	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 5/5/4
3198	14	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 7/4/3
3199	14	*Ilex x Nellie Stevens*	Nellie Stevens holly	Good	Multi stem - 5/5/4
3200	24	*Quercus phellos*	Willow oak	Good	
3201	25	*Quercus phellos*	Willow oak	Good	
3202	19	*Quercus phellos*	Willow oak	Good	
3203	18	*Quercus phellos*	Willow oak	Good	
3204	22	*Quercus phellos*	Willow oak	Good	
3205	26	*Quercus phellos*	Willow oak	Good	
3206	18	*Acer rubrum*	Red maple	Good	
3207	4	*Lagerstroemia sp.*	Crape mrytle	Poor	Trunk wound with decay
3208	12	*Lagerstroemia sp.*	Crape mrytle	Poor	Multi stem - 4/4/4; decay in base
3209	8	*Lagerstroemia sp.*	Crape mrytle	Good	Multiple stem - 4/4
3210	21	*Quercus shumardii*	Shumard oak	Good	
3211	11	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3212	7	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 3/2/2
3213	9	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 3/3/3
3214	14	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 6/5/3
3215	16	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 6/5/5
3216	14	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 5/5/4
3217	32	*Quercus phellos*	Willow oak	Good	
3218	31	*Quercus phellos*	Willow oak	Good	
3219	29	*Quercus phellos*	Willow oak	Good	
3220	25	*Quercus phellos*	Willow oak	Good	
3221	27	*Quercus phellos*	Willow oak	Good	
3222	15	*Quercus phellos*	Willow oak	Good	
3223	25	*Quercus phellos*	Willow oak	Good	
3224	23	*Quercus phellos*	Willow oak	Good	
3225	18	*Quercus phellos*	Willow oak	Fair	Thin canopy
3226	22	*Quercus phellos*	Willow oak	Good	
3227	10	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3228	11	*Acer rubrum*	Red maple	Good	
3229	21	*Quercus phellos*	Willow oak	Good	
3230	15	*Acer rubrum*	Red maple	Good	
3231	15	*Acer rubrum*	Red maple	Good	
3232	15	*Acer rubrum*	Red maple	Good	
3233	17	*Acer rubrum*	Red maple	Fair	Light decay in pruning wound
3234	18	*Acer rubrum*	Red maple	Good	
3235	20	*Acer rubrum*	Red maple	Good	
3236	20	*Acer rubrum*	Red maple	Good	
3237	20	*Acer rubrum*	Red maple	Good	
3238	5	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3239	5	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3240	5	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; mistletoe on trunk; dieback in canopy
3241	5	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3242	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3243	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3244	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3245	7	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in trunk and canopy
3246	5	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3247	6	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3248	5	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy

3249	7	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3250	7	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3251	9	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 5/4
3252	14	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 5/5/4
3253	13	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 5/4/4
3254	13	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 5/4/4
3255	12	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 4/4/4
3256	13	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 5/5/3
3257	14	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 6/5/3
3258	6	*Magnolia x soulangeana*	Saucer magnolia	Good	Multi stem - 2/2/2
3259	6	*Magnolia x soulangeana*	Saucer magnolia	Good	Multi stem - 2/2/2
3260	6	*Magnolia x soulangeana*	Saucer magnolia	Good	Multi stem - 2/2/2
3261	16	*Acer rubrum*	Red maple	Good	
3262	16	*Acer rubrum*	Red maple	Good	
3263	14	*Acer rubrum*	Red maple	Fair	Light decay in pruning wound
3264	12	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 6/3/3
3265	14	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 6/4/4
3266	11	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 5/3/3
3267	13	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 6/5/2
3268	15	*Acer rubrum*	Red maple	Poor	Trunk wounds with fungal fruiting bodies and decay
3269	15	*Acer rubrum*	Red maple	Poor	Trunk wounds and dieback in trunk
3270	21	*Quercus shumardii*	Shumard oak	Good	
3271	14	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3272	12	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3273	17	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3274	15	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3275	13	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3276	16	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3277	14	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3278	13	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3279	13	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3280	13	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3281	12	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3282	12	*Cupressus x leylandii*	Leyland cypress	Fair	Interior dieback; undesirable species
3283	8	*Ilex x attenuata Fosteri*	Foster holly	Fair	Trunk wound with no decay
3284	13	*Ilex x attenuata Fosteri*	Foster holly	Good	Multi stem - 5/4/4
3285	10	*Ilex x attenuata Fosteri*	Foster holly	Good	
3286	12	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/4/4
3287	12	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/4/4
3288	10	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/3/3
3289	12	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/4/4
3290	12	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/4/4
3291	10	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/3/3

3292	10	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/3/3
3293	12	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 6/4/2
3294	13	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 5/5/3
3295	10	*Juniperus virginiana*	Eastern red cedar	Poor	Dieback in canopy
3296	9	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3297	8	*Ulmus parvifolia*	Chinese elm	Fair	Invasive species; light dieback in canopy
3298	9	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3299	9	*Ulmus parvifolia*	Chinese elm	Fair	Invasive species; light dieback in canopy
3300	9	*Ulmus parvifolia*	Chinese elm	Poor	Invasive species; dieback in canopy
3301	8	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 3/3/2
3302	8	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 3/3/2
3303	8	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 3/3/2
3304	7	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 3/2/2
3305	7	*Lagerstroemia sp.*	Crape mrytle	Poor	Multi stem - 3/2/2; dieback in trunk
3306	8	*Lagerstroemia sp.*	Crape mrytle	Good	Multi stem - 3/3/2
3307	10	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3308	9	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3309	10	*Ulmus parvifolia*	Chinese elm	Fair	Invasive species; light dieback in canopy
3310	13	*Ulmus parvifolia*	Chinese elm	Fair	Invasive species; light dieback in canopy
3311	11	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 4/4/3
3312	12	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 4/4/4
3313	15	*Ilex vomitoria*	Yaupon holly	Fair	Multi stem - 5/5/5; trunk wound with no decay
3314	13	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 5/5/3
3315	13	*Ilex vomitoria*	Yaupon holly	Fair	Multi stem - 5/5/3; trunk wounds with no decay
3316	12	*Ilex vomitoria*	Yaupon holly	Good	Multi stem - 4/4/4
3317	14	*Ilex vomitoria*	Yaupon holly	Fair	Multi stem - 5/5/4; trunk wounds with no decay
3318	13	*Ulmus parvifolia*	Chinese elm	Good	Invasive species
3319	12	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 5/4/3
3320	8	*Ilex cornuta Burfordii*	Burford holly	Fair	Multi stem - 4/2/2; light dieback
3321	8	*Ilex cornuta Burfordii*	Burford holly	Poor	Multi stem - 4/2/2; dieback
3322	10	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/3/3
3323	10	*Ilex cornuta Burfordii*	Burford holly	Good	Multi stem - 4/3/3
3324	6	*Cryptomeria japonica*	Cryptomeria	Good	
3325	8	*Cryptomeria japonica*	Cryptomeria	Good	
3326	6	*Cryptomeria japonica*	Cryptomeria	Good	
3327	6	*Cryptomeria japonica*	Cryptomeria	Good	
3328	6	*Acer rubrum*	Red maple	Good	Boundary tree
3329	5	*Liquidambar styraciflua*	Sweetgum	Good	
3330	5	*Liquidambar styraciflua*	Sweetgum	Good	
3331	6	*Magnolia grandiflora*	Southern magnolia	Good	
3332	6	*Magnolia grandiflora*	Southern magnolia	Good	
3333	6	*Magnolia grandiflora*	Southern magnolia	Good	
3334	6	*Magnolia grandiflora*	Southern magnolia	Good	
3335	6	*Magnolia grandiflora*	Southern magnolia	Good	
3336	9	*Quercus phellos*	Willow oak	Good	Boundary tree
3337	7	*Acer rubrum*	Red maple	Good	Boundary tree
3338	6	*Acer rubrum*	Red maple	Good	Boundary tree
3339	8	*Acer rubrum*	Red maple	Good	Boundary tree
3340	8	*Quercus nuttallii*	Nuttall oak	Good	Boundary tree

brookwood
tree consulting, inc

706.202.6516
www.brookwoodtree.com

PO BOX 570186
ATLANTA, GA 30357

November 1, 2024

3650 Brookside Parkway - Poor Condition Tree Photos



Tree 3027 - Dieback in canopy



Tree 3041 - Dieback in canopy



Tree 3041 - Invasive species; dieback in canopy



Tree 3044 - Invasive species; dieback and mistletoe in canopy



Tree 3045 - Invasive species; dieback in canopy



Tree 3060 - Dieback in canopy



Tree 3065 - Invasive species; damage and dieback in trunk and canopy



Tree 3065 - Invasive species; damage and dieback in trunk and canopy



Tree 3069 - Dieback in trunk and canopy



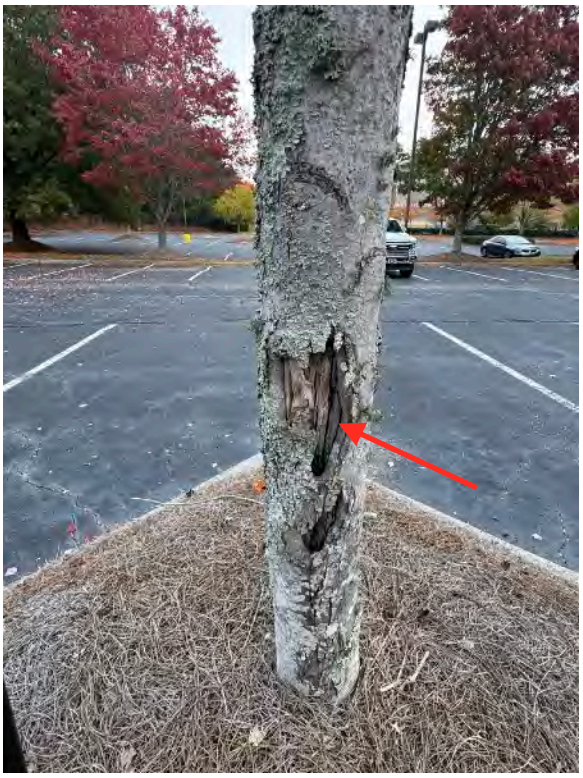
Tree 3070 - Decay in trunk; dieback in canopy



Tree 3070 - Decay in trunk; dieback in canopy



Tree 3073 - Trunk wound with decay



Tree 3074 - Trunk wound with decay; dieback in canopy



Tree 3074 - Trunk wound with decay; dieback in canopy



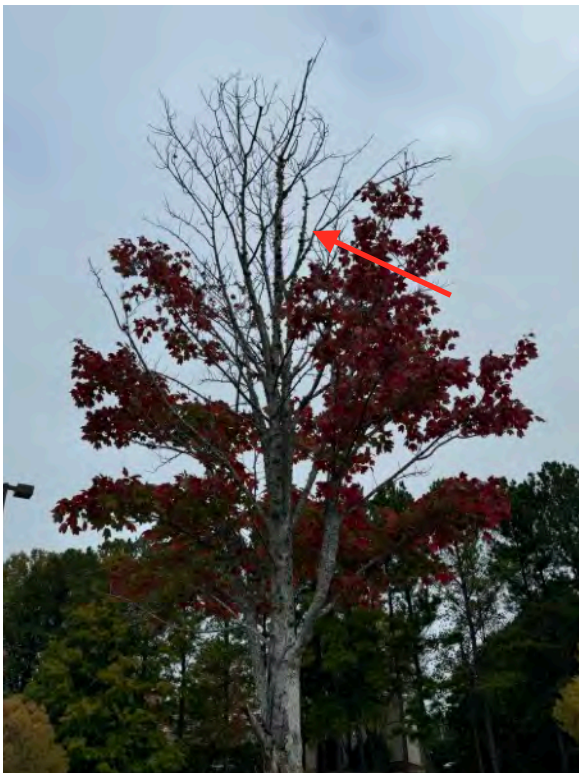
Tree 3081 - Dieback in canopy



Tree 3085 - Invasive species; dieback in canopy



Tree 3089 - Trunk wound with decay; dieback in canopy



Tree 3089 - Trunk wound with decay; dieback in canopy



Tree 3094 - Trunk wound with decay; dieback in canopy



Tree 3094 - Trunk wound with decay; dieback in canopy



Tree 3116 - Fusiform rust canker on trunk



Tree 3117 - One-sided, suppressed canopy



Tree 3121 - One-sided, suppressed canopy



Tree 3122 - Fusiform rust canker on lower trunk



Tree 3126 - One-sided, suppressed canopy



Tree 3128 - Dieback in codominant leader



Tree 3207 - Trunk wound with decay



Tree 3208 - Multi stem - 4/4/4; decay in base



Tree 3240 - Invasive species; mistletoe on trunk; dieback in canopy



Tree 3240 - Invasive species; mistletoe on trunk; dieback in canopy



Tree 3241 - Invasive species; dieback in canopy



Tree 3245 - Invasive species; dieback in trunk and canopy



Tree 3245 - Invasive species; dieback in trunk and canopy



Tree 3246 - Invasive species; dieback in canopy



Tree 3247 - Invasive species; dieback in canopy



Tree 3248 - Invasive species; dieback in canopy



Tree 3249 - Invasive species; dieback in canopy



Tree 3268 - Trunk wounds with fungal fruiting bodies and decay



Tree 3269 - Trunk wounds and dieback in trunk



Tree 3295 - Dieback in canopy



Tree 3300 - Invasive species; dieback in canopy



Tree 3305 - Multi stem - 3/2/2; dieback in trunk



Tree 3321 - Multi stem - 4/2/2; dieback

Trip Generation Report

MEMORANDUM

To: Clint Walters, *The Providence Group of Georgia, LLC.*

From: Olivia Cook, P.E., *Kimley-Horn and Associates, Inc.*
John D. Walker, P.E., PTOE, *Kimley-Horn and Associates, Inc.*

Date: December 1, 2025

RE: ***Brookside West, City of Alpharetta, Georgia***
Traffic Technical Memorandum

Kimley-Horn is pleased to provide this traffic technical memorandum regarding the proposed *Brookside West* development in the City of Alpharetta, Georgia. The purpose of this memorandum is to get approval from the City of Alpharetta regarding analysis assumptions for the traffic impact study, if required.

INTRODUCTION

The *Brookside West* development is a proposed residential development consisting of a maximum of 104 townhomes. The approximate 8.76-acre site is located at 3650 Brookside Parkway along the south side of Old Milton Parkway (SR 120) and the north side of Brookside Parkway.

The site currently consists of a vacant, multi-story office building and is zoned (O-I) for Office Institutional land uses. The proposed zoning is R-10M for Multiple Family Residential land uses.

The existing site is served by two (2) full-movement driveways along Brookside Parkway. One driveway is located on the western side of the site (offset to the south from the driveway to 3655 Brookside Parkway across the street) while the other driveway is located along the south side of the site (aligned with an entrance to Georgia State University Alpharetta mission Center). The reconfigured residential site will keep the southern driveway location and it will remain full-movement. The existing western driveway will be shifted north along Brookside Parkway (north of the driveway to 3655 Brookside Parkway), and converted to right-in/right-out (RIRO).

Figure 1 provides a location map. **Figure 2** provides an aerial imagery of the project site. Additionally, the preliminary site plan for the proposed development is provided.

Currently, there are two (2) adjacent developments: DRI 4317 (*Brookside Mixed-Use*) and the *Brookside East* development which has begun construction. The adjacent development traffic will be analyzed as projected background (non-project) traffic since the traffic is expected on the roadway without the *Brookside West* development.

STUDY INTERSECTIONS

If a traffic impact study is required, it is proposed to collect vehicle peak hour turning movement counts at the following study intersections:

1. Old Milton Parkway (SR 120) at Brookside Parkway/Cotton Creek (signalized)
2. Old Milton Parkway (SR 120) at Brookside Parkway/Vista Forest Drive (signalized)
3. Brookside Parkway at West Driveway/3655 Brookside Driveway (unsignalized)
4. Brookside Parkway at South Driveway/Georgia State University Driveway (unsignalized)

It is proposed to collect a 24-hour bi-directional speed count along Brookside Parkway, west of the south driveway since the roadway is adjacent to access to the *Brookside West* development.

BACKGROUND GROWTH

Traffic volumes for future conditions are proposed to be based on annual traffic growth. The growth rate for the area was calculated using historical traffic count data obtained from GDOT's Traffic Analysis and Data Application (TADA) database throughout the study roadway network. Additionally, census data was researched for population growth estimates. The growth rate calculations are provided as an attachment.

Based on the historical data, The Existing 2025 peak hour traffic volumes are proposed to be increased by 1.0% per year to account for the expected background growth in traffic through the estimated build-out year of 2028. This is consistent with the previously noted DRI 4317 (*Brookside Mixed-Use*) development.

ADJACENT PROJECTS

The Atlanta Regional Commission's 2050 Metropolitan Transportation Plan, GDOT Statewide TIP (STIP), GDOT's GeoPI system, Fulton County TSPLOST, Fulton County's Comprehensive Transportation Plan (CTP), and Alpharetta City Projects portal were researched for currently programmed transportation projects within the vicinity of the proposed development:

- **SR 120 (Old Milton Parkway) Widening (PI 0017187 & ARC FN-176):** This project proposes to widen SR 120 (Old Milton Parkway) from Northpoint Parkway to Kimball Bridge Road. The construction date is estimated to be 2028.
- **Brookside Parkway Road Diet:** This project proposes to reduce the number of lanes along Brookside Parkway from its western intersection with SR 120 (Old Milton Parkway) to the eastern intersection. The roadway is proposed to be 1 lane in each direction and is proposed to be constructed by 2029.
- **Alpha Loop Multiuse Path Phase 2:** This phase of the Alpha Loop is from Chelsea Walk Neighborhood to Thompson Street. No construction date is available.
- **Alpha Loop Multiuse Path Phase 3:** This phase of the Alpha Loop is from Atley Neighborhood to Westside Parkway. No construction date is available.

The above projects are projected to affect roadway laneage or traffic volumes of the study network. Therefore, all projects will be included in the analysis.

TRIP GENERATION

Project traffic used in this analysis is defined as the vehicle trips expected to be generated by the development and the distribution and assignment of that traffic through the study roadway network.

Anticipated trip generation for the proposed *Brookside West* development was calculated using rates and equations contained in the Institute of Transportation Engineers' (ITE) *Trip Generation Manual*, 12th Edition, 2025. The project trip generation for the *Brookside West* development is summarized in **Table 1**.

Table 1: Gross Trip Generation for Proposed Brookside West Development

Land Use	ITE Code	Density	Daily Traffic			AM Peak Hour			PM Peak Hour		
			Total	Enter	Exit	Total	Enter	Exit	Total	Enter	Exit
Single Family Attached	*215*	*104 units*	682	341	341	46	12	34	51	29	22
Gross Trips Total			**682**	**341**	**341**	**46**	**12**	**34**	**51**	**29**	**22**

Note: To present a conservative analysis, no reductions due to alternative mode, pass-by, or internal capture were assumed.

Based on the trip generation shown in **Table 1**, the proposed *Brookside West* development is projected to generate up to 682 gross daily trips (341 in; 341 out), 46 AM peak hour trips, and 51 PM peak hour trips on an average weekday.

TRIP DISTRIBUTION AND ASSIGNMENT

The directional distribution and assignment of adding new trips (project trips) related to the proposed development was based on a review of land uses and population densities in the area, and a review of the existing travel patterns in the area. A detailed residential trip distribution and assignment is shown in **Figure 3**.

SUMMARY

As currently envisioned, the *Brookside West* development will consist of 104 townhomes. Additionally, there are two (2) adjacent developments that will be included in the analysis as projected background traffic. The *Brookside West* development is located on an 8.76-acre site south of SR 120 (Old Milton Parkway) and north of Brookside Parkway, at 3650 Brookside Parkway. The site currently consists of a vacant multistory office building. The proposed development is expected to generate 682 total daily gross peak hour trips, 46 AM peak hour trips, and 51 PM peak hour trips. The following four (4) intersections are proposed to be studied:

1. Old Milton Parkway (SR 120) at Brookside Parkway/Cotton Creek (signalized)
2. Old Milton Parkway (SR 120) at Brookside Parkway/Vista Forest Drive (signalized)
3. Brookside Parkway at West Driveway/3655 Brookside Driveway (unsignalized)
4. Brookside Parkway at South Driveway/Georgia State University Driveway (unsignalized)

The Existing 2025 traffic volumes will be grown at 1.0% per year through the build-out of the project. The proposed trip distributions are attached to this memorandum.

Kimley-Horn is prepared to move forward with the detailed traffic analysis and the full traffic impact study. We request your concurrence with the traffic study methodology documented in this technical traffic memorandum at your earliest convenience.

We hope this information is helpful. Please contact me if you have any questions.

Sincerely,

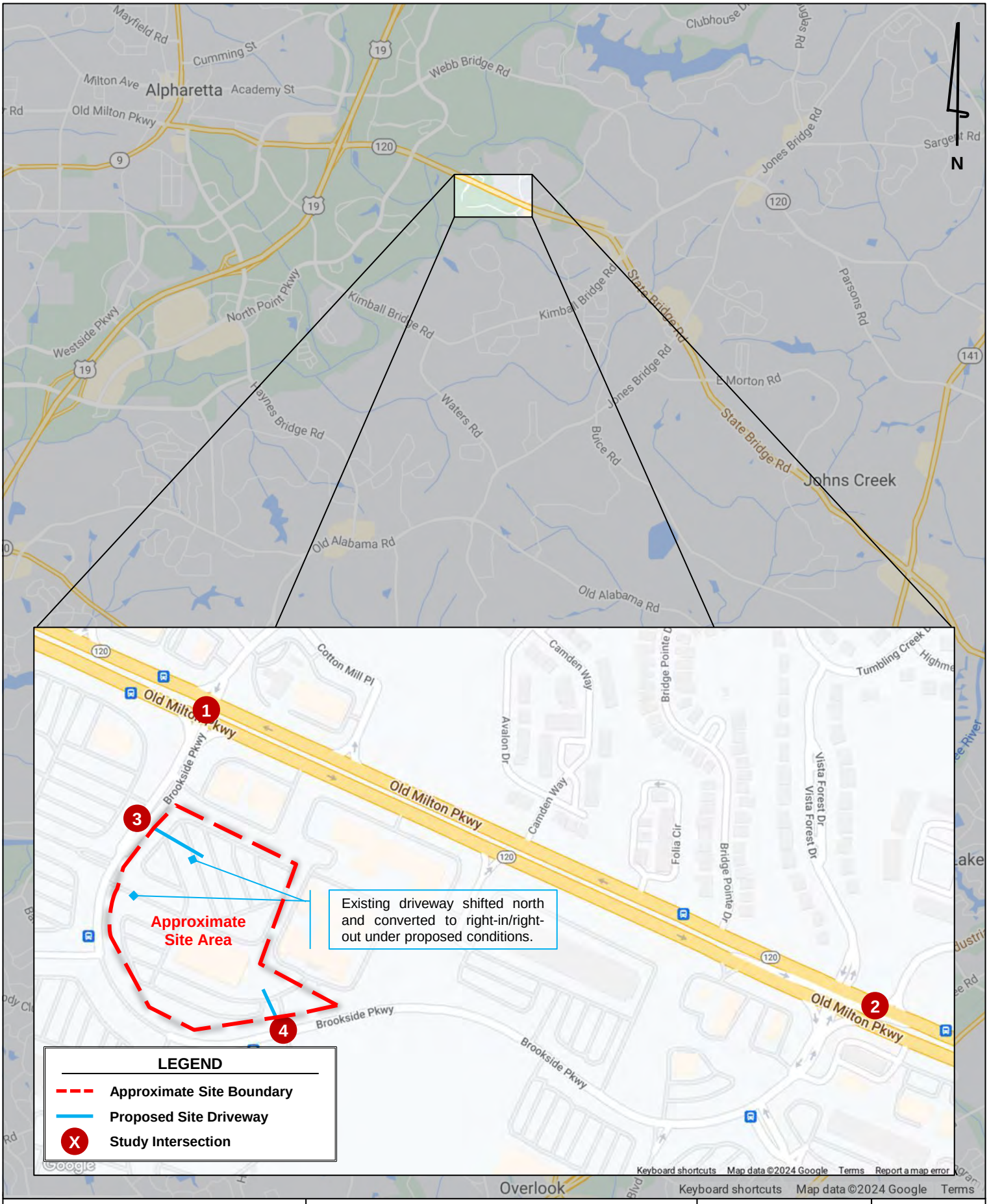
KIMLEY-HORN AND ASSOCIATES, INC.

John D. Walker, P.E., PTOE
Senior Vice President

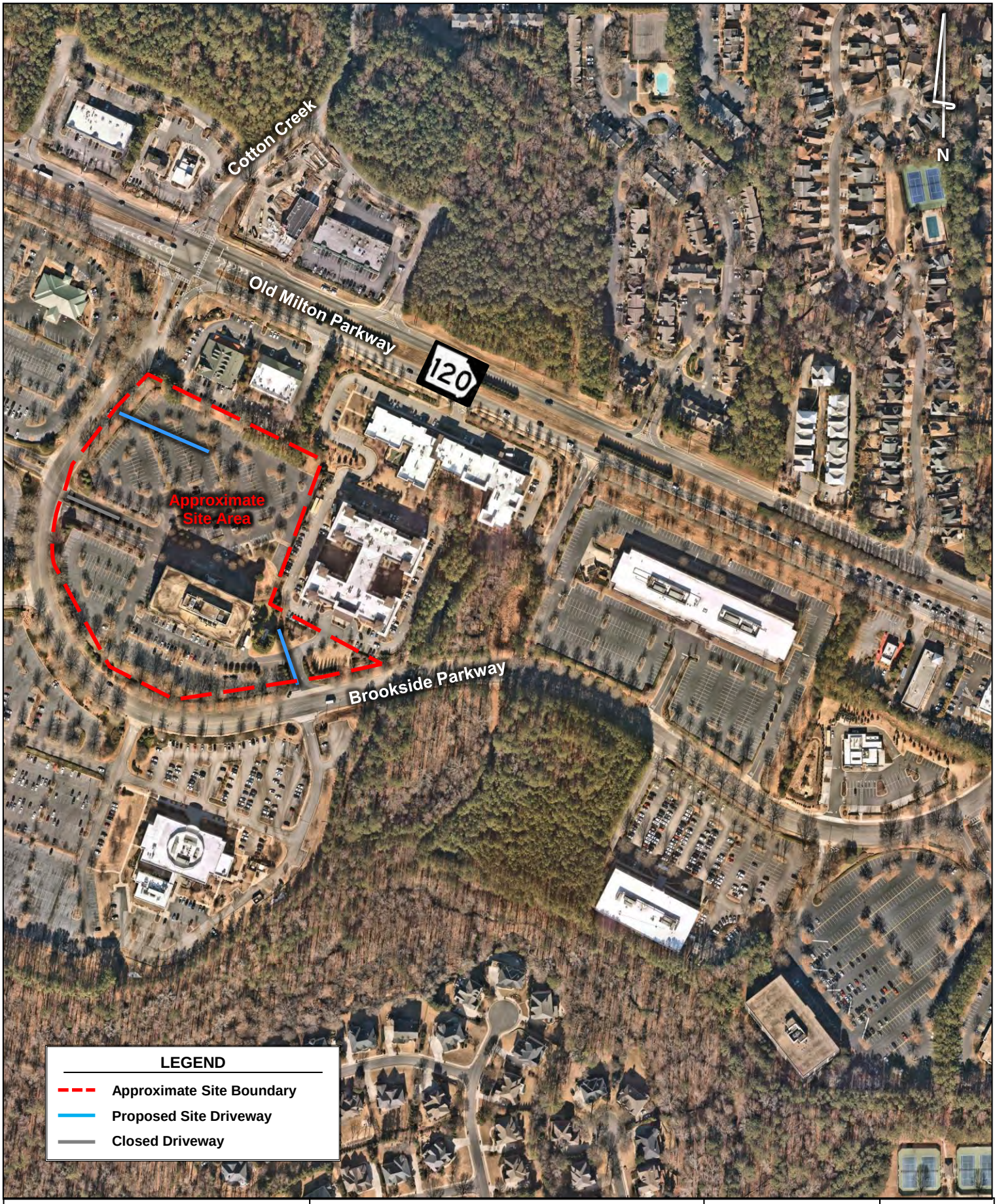
Olivia Cook, P.E.
Project Engineer

Attachments:

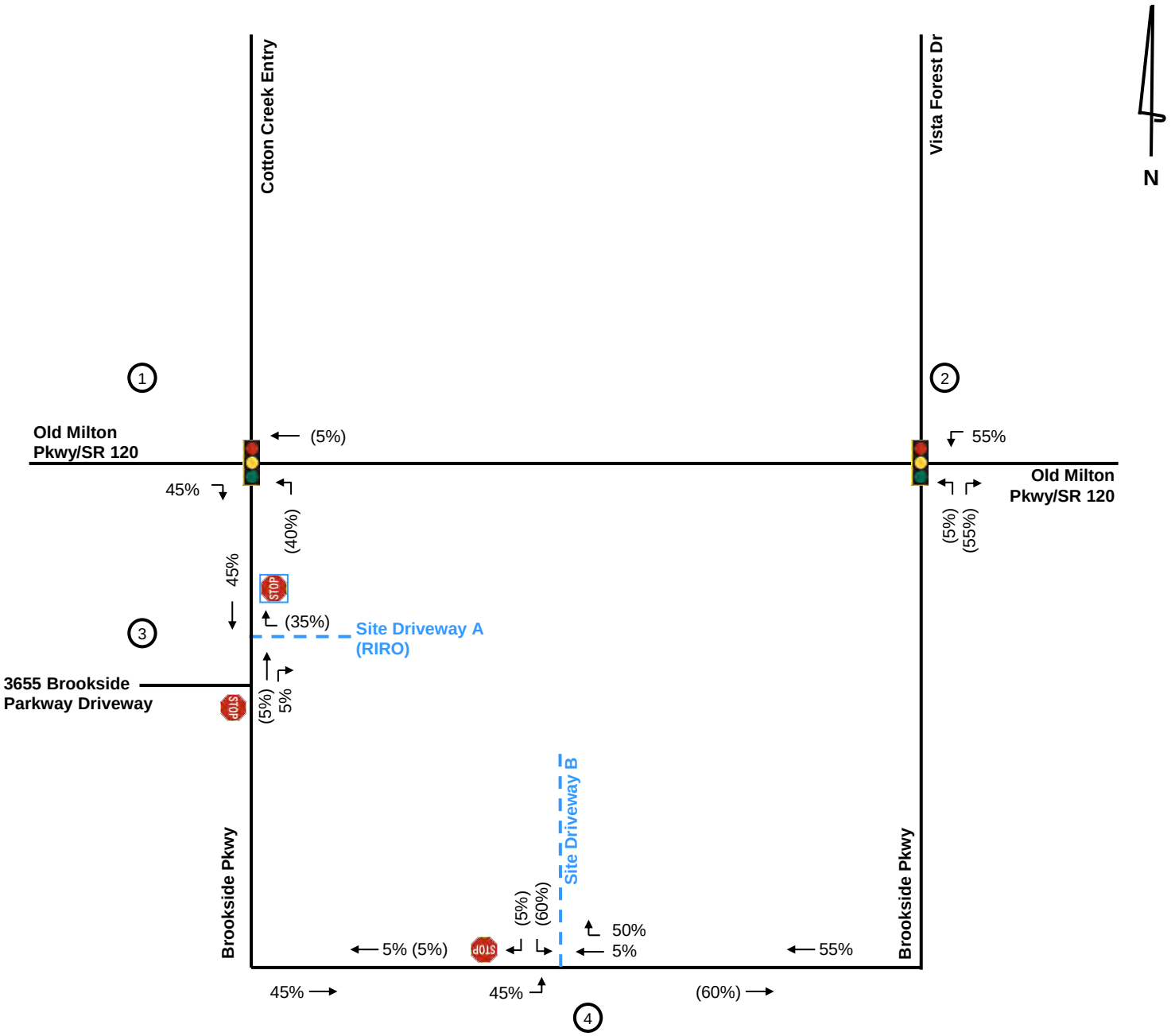
- Figure 1: Site Location Map
- Figure 2: Site Aerial
- Figure 3: Trip Distribution & Assignment
- Growth Rate Calculations
- Site Plan



Kimley»Horn	***Brookside West*** **Traffic Tech Memo**	**Site Location Map**	**Figure 1**



Kimley»Horn	***Brookside West*** **Traffic Tech Memo**	**Site Aerial**	**Figure 2**



LEGEND

- Turning Movement
- XX % Traffic Entering
- (XX) % Traffic Exiting
- Proposed Driveway
- Proposed STOP Control
- Existing STOP Control
- Existing Traffic Signal
- (X) Intersection Reference Number

Kimley»Horn	***Brookside West*** **Traffic Tech Memo**	**Trip Distribution & Assignment**	**Figure 3**

Trip Generation Analysis (12th Ed. with *2nd Edition Handbook* Daily IC & *3rd Edition* AM/PM IC)
Brookside West
City of Alpharetta, Georgia

Land Use	Intensity	Daily Trips	AM Peak Hour			PM Peak Hour		
			Total	In	Out	Total	In	Out
215 Single-Family Attached Housing	104 d.u.	682	46	12	34	51	29	22
Gross Trips		**682**	**46**	**12**	**34**	**51**	**29**	**22**
Residential Trips		682	46	12	34	51	29	22
Mixed-Use Reductions		*0*	*0*	*0*	*0*	*0*	*0*	*0*
Alternative Mode Reductions		*0*	*0*	*0*	*0*	*0*	*0*	*0*
Adjusted Residential Trips		682	46	12	34	51	29	22
Mixed-Use Reductions - TOTAL		*0*	*0*	*0*	*0*	*0*	*0*	*0*
Alternative Mode Reductions - TOTAL		*0*	*0*	*0*	*0*	*0*	*0*	*0*
Pass-By Reductions - TOTAL		*0*	*0*	*0*	*0*	*0*	*0*	*0*
New Trips		**682**	**46**	**12**	**34**	**51**	**29**	**22**

k:\alp_tpto\019913032_brookside traffic-alpharetta-tripgen-tia-october 2023\other brookside nov 2025\[brooksideanalysis.xlsm]trip generation

Brookside West
Growth Rate Table

Source:	GDOT
Location:	Old Milton Parkway (SR 12)
	w/o SR 400
Route Type:	Principal Arterial
Station:	121-0310

Count Year	Volume	Growth Rate
2018	45,100	
2019	50,000	10.86%
2020	*46,100*	*-7.80%*
2021	49,800	8.03%
2022	51,800	4.02%
Avg. 1 Year Rates 2018-2022		**3.52%**

Source:	GDOT
Location:	Old Milton Parkway (SR 120)
	e/o Brookside Parkway/Cotton Creek
Route Type:	Principal Arterial
Station:	121-0312

Count Year	Volume	Growth Rate
2018	52,000	
2019	52,400	0.77%
2020	*41,800*	*-20.23%*
2021	45,100	7.89%
2022	47,900	6.21%
Avg. 1 Year Rates 2018-2022		**-2.03%**

Source:	GDOT
Location:	Webb Bridge Road
	w/o Park Bridge Road
Route Type:	Major Collector
Station:	121-0918

Count Year	Volume	Growth Rate
2018	18,200	
2019	18,600	2.20%
2020	*17,300*	*-6.99%*
2021	18,300	5.78%
2022	12,800	-30.05%
Avg. 1 Year Rates 2018-2022		**-8.42%**

Source:	GDOT
Location:	Park Bridge Road
	n/o Old Milton Parkway (SR 12)
Route Type:	Local Road
Station:	121-8739

Count Year	Volume	Growth Rate
2018	5,110	
2019	5,210	1.96%
2020	*2,460*	*-52.78%*
2021	2,610	6.10%
2022	2,670	2.30%
Avg. 1 Year Rates 2018-2022		**-14.98%**

Source:	GDOT
Location:	Webb Bridge Road
	n/o Kimball Bridge Road
Route Type:	Major Collector
Station:	121-7222

Count Year	Volume	Growth Rate
2018	12,800	
2019	13,100	2.34%
2020	*12,100*	*-7.63%*
2021	11,900	-1.65%
2022	12,200	2.52%
Avg. 1 Year Rates 2018-2022		**-1.19%**

Source:	GDOT
Location:	Kimball Bridge Road
	e/o Webb Bridge Road
Route Type:	Minor Arterial
Station:	121-0314

Count Year	Volume	Growth Rate
2018	26,200	
2019	30,500	16.41%
2020	*28,100*	*-7.87%*
2021	28,700	2.14%
2022	29,900	4.18%
Avg. 1 Year Rates 2018-2022		**3.36%**

	Annual Growth
Fulton County Population Annual Growth (2000-2010):	1.21%
Fulton County Population Annual Growth (2010-2020):	1.48%
Fulton County ARC Population Forecast (2020-2050):	0.72%
City of Alpharetta Population Annual Growth (2000-2010):	5.14%
City of Alpharetta Population Annual Growth (2010-2020):	1.35%



SITE NOTES

1. Site area - ±8.76 acres
2. Total Number of Lots/Units - 104
3. Density - 11.8 Lot/Units per acre.
4. Existing Zoning - O-I
5. Proposed Zoning - R-10M
6. Proposed land use : Residential
   - 30 - 22' wide Townhome
   - 38 - 20' wide Townhome
   - 36 - 18' wide Townhome

NORTH

0 20 40 80

SCALE IN FEET

thePROVIDENCEgroup

BROOKSIDE WEST | CONCEPT PLAN

ALPHARETTA, GA

12/01/25

THIS DOCUMENT, TOGETHER WITH THE CONCEPTS AND DESIGNS PRESENTED HEREIN, AS AN INSTRUMENT OF SERVICE, IS INTENDED ONLY FOR THE SPECIFIC PURPOSE AND CLIENT FOR WHICH IT WAS PREPARED. REUSE OF AND IMPROPER RELIANCE ON THIS DOCUMENT WITHOUT WRITTEN AUTHORIZATION AND ADAPTATION BY KIMLEY-HORN AND ASSOCIATES, INC. SHALL BE WITHOUT LIABILITY TO KIMLEY-HORN AND ASSOCIATES, INC. COPYRIGHT KIMLEY-HORN AND ASSOCIATES, INC., 2025

Kimley»Horn

STAFF REPORT

Department: Human Resources
Submitted By: Cris Randall
Meeting Date: May 4, 2026

AGENDA ITEM:

Resolution: Revised Employee Manual and Benefits Handbook
Consideration and approval of a Resolution adopting the revised Employee Manual and Benefits Handbook.

STAFF RECOMMENDATION:

Staff recommends approval of the proposed updates to the City's Employee Manual and Benefits Handbook as presented.

BUDGET & PROCUREMENT:

BUDGETED ITEM: YES

FISCAL IMPACT: YES

INCLUDED IN CURRENT FY CPTL BUDGET: NO

INCLUDED IN CURRENT FY OPRT. BUDGET: YES

TOTAL PROJECT COST: RECOMMENDED SLIGHT INCREASE TO THE PTO ACCRUAL BALANCE MAY RESULT IN AN ESTIMATED BUDGET IMPACT OF APPROXIMATELY $10,000, DEPENDING ON THE NUMBER OF EMPLOYEE SEPARATIONS WITHIN A GIVEN FISCAL YEAR. THIS INITIATIVE HAS NO IMPACT ON THE PENSION/RETIREMENT PLANS. THE PENSION PLANS' LIMIT ON THE HOURS OF PTO SEPARATION ALLOWABLE FOR PENSION ACCRUAL IS NOT BEING MODIFIED BY THIS ACTION. AVAILABLE BUDGET IS FORECASTED IN SALARIES ACCOUNT ACROSS ALL DEPARTMENTS.

APPROPRIATIONS:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

EXTERNAL FUNDING SOURCES:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

ITEM DESCRIPTION:

The purpose of these updates is to enhance clarity, transparency, and consistent application of the Employee Manual and Benefits Handbook. The recommended revisions primarily consist of added content and language modifications intended to improve interpretation, clarify expectations, and support consistent implementation across departments. Additional language has also been included to formalize practices that are already in place and to ensure compliance with applicable federal employment laws.

The Communications section of the handbook has been updated to incorporate Information Technology (IT) policies. These policies, maintained by the IT Department, serve as an extension of the handbook and provide guidance governing the use of City systems, networks, data, and devices, including personal devices used for City business. Due to the evolving nature of technology, security risks, and operational needs, IT policies are maintained separately and are available on the HR SharePoint site.

Key areas of revision include:

- Renaming and expanding the Communications section to **Communications & IT Resources**, including expectations related to acceptable use of IT resources, artificial intelligence, cybersecurity, and social media;
- Updating **Basic Work Rules** to include enhanced language addressing workplace conduct and respect for others;
- Incorporating provisions related to the **Pregnant Workers Fairness Act**, in alignment with federal law effective June 27, 2023;
- Including language reflecting the **Supplemental Retirement Plan** benefit, offered through the Peace Officers' Annuity and Benefit Fund (POAB) and the Georgia Firefighters' Pension Fund (GFPF), as previously approved by the Mayor and Council on January 3, 2023;
- Extend the initial two (2) weeks of paid time off accrual upon hire to all job classifications, consistent with the recruitment incentive already provided to 911 and sworn Police and Fire positions since 2019, in order to enhance organizational equity, strengthen recruitment efforts, and maintain competitiveness in the labor market;
- Increase the maximum PTO accrual balance that employees may carry forward from year to year by the equivalent of two (2) additional days. This adjustment provides modest additional flexibility for employees while having no impact on the pension fund.
- Updating language throughout to improve clarity and promote consistent interpretation of current practices.

ALTERNATIVES:

Mayor and Council may elect not to approve the proposed updates and provide further direction to staff.

ATTACHMENTS:

1. Resolution Adopting Revisions to the Employee Manual
2. Employee Handbook – 2026 Redline Revisions

RESOLUTION NUMBER:

A RESOLUTION BY THE MAYOR AND COUNCIL OF THE CITY OF ALPHARETTA, GEORGIA ADOPTING REVISED EMPLOYEE MANUAL AND BENEFITS HANDBOOK

WHEREAS, the City of Alpharetta may adopt rules and regulations consistent with its Charter concerning personnel policies as provided by Alpharetta, Ga. Charter § 3.16; and

WHEREAS, the City of Alpharetta maintains a Department of Human Resources, which is responsible for establishing, administering, enforcing and effectively communicating sound employee policies and practices; and

WHEREAS, the Department of Human Resources recommends revisions to the Employee Manual and Benefits Handbook consisting of nomenclature clarifications; updates to information technology-related policies within the Communications section; revisions to ensure compliance with applicable federal laws, including the Pregnant Workers Fairness Act; other minor revisions intended to formalize existing practices; and incorporation of items previously approved by this Council, including, for instance, allowance of participation in the Peace Officers' Annuity and Benefit Fund of Georgia and the Georgia Firefighters Pension Fund.

NOW THEREFORE, BE IT RESOLVED by the Mayor and City Council of the City of Alpharetta that the revised Employee Manual and Benefits Handbook, a copy of which is attached to this Resolution, is hereby adopted.

BE IT FURTHER RESOLVED that all resolutions and parts of resolutions in conflict with this Resolution are hereby repealed to the extent of such conflict.

BE IT FURTHER RESOLVED that this Resolution shall become effective when adopted.

SO RESOLVED this ____ day of May 2026.

CITY OF ALPHARETTA

By: _____
Jim Gilvin, Mayor

[SIGNATURES CONTINUED ON FOLLOWING PAGE]

[SIGNATURES CONTINUED FROM PRECEDING PAGE]

COUNCIL MEMBERS

_____
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Council Member T. Kirk Driskell

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Council Member Katie Reeves

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Council Member Douglas J. DeRito

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(SEAL)

Attest:

_____
Grace Orehosky, Acting City Clerk

Approved as to form and legal sufficiency:

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Molly Esswein, City Attorney



Employee Manual & Benefits Handbook

An Everyday Guide to Our Mission, Core Values, Personnel Policies and Employee Benefits

Adopted: May 4, 2026
Effective: May 5, 2026

Our MISSION

is to make a positive difference in the community by efficiently managing public resources and providing effective services and leadership that exceed the expectations of our citizens.

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MISSION STATEMENT

To make a positive difference in the community by efficiently managing public resources and providing effective services and leadership that exceed the expectations of our citizens.

OUR CORE VALUES

The City has identified shared values that are at the core of every decision, action, and policy we make. They are the bedrock on which our organization stands and serve as a guide with respect to our actions and the City's expectations of its employees.

Excellence: We believe expectations are the starting point; not the destination. Every member of the City of Alpharetta Team shall be dedicated to the pursuit of continuous improvement in our results and how these results are achieved.

Stewardship: The citizens of Alpharetta have entrusted to us public resources and empowered us to protect, invest, and leverage them for the good and betterment of the community. We shall do so in a manner that reflects the highest ethics, exacting standards, and unwavering principles.

Integrity: The trust of the public is the foundation of our ability to conduct the business of local government and realize the City's mission. Every member of the City of Alpharetta Team shall maintain her or his reputation for honesty, straightforwardness, fair dealing, and a sincere desire to serve in the best interest of the community and citizens of Alpharetta.

Service: The City of Alpharetta is committed to efficient, effective, and responsive service delivery that makes a positive difference in the community and the lives of those we serve. We shall proactively address issues and pursue opportunities, act with humility, and deliver more than what is expected.

Loyalty: Through our every word and action, we shall serve, protect, and promote the community and citizens of Alpharetta; advance the City's mission; and support and work in unity with those with whom we serve.

PURPOSE OF THE HANDBOOK

The City of Alpharetta ("City") has developed this Employee Manual and Benefits Handbook ("Handbook") to communicate City's policies, rules, regulations, and procedures applicable to all City employees. The Handbook is designed to acquaint you with our City and to answer many questions regarding your employment with us. Employees are required to be familiar with the Handbook and adhere to all its sections. All employees must acknowledge receipt of the Handbook upon hire and periodically throughout the course of employment. Keep in mind, business conditions change, and this Handbook is only a summary of the employee benefits, personnel policies, and employment rules that are in effect at the time the Handbook is published.

> This Handbook does not create an "employment contract" or other contractual rights or in any way alter the employment-at-will doctrine under which all employees are employed. Employment-at-will means that either the employee or the City can terminate the employment relationship at any time and for any reason. Although the City intends that the benefits, policies and regulations outlined in this Handbook will generally remain in effect, the City reserves the right to, at any time, amend, curtail or to otherwise revise the content of this Handbook.

This Handbook applies to all employees. However, where it conflicts with any contract, such as insurance summary plan descriptions, that contract shall control.

> This City Handbook supersedes all prior City Handbooks or personnel policies and may be changed from time-to-time as necessary.

Human Resources ("HR") is the authority responsible for this Handbook. City departments may issue policies to address particular needs of the department, provided those policies are first reviewed and approved by HR and in certain cases approved by the City Council. You must follow all applicable departmental policies and read those departmental policies in conjunction with this Handbook. Departmental policies may be more restrictive (but not less restrictive) than those contained in this Handbook. Violations of this Handbook, the City's Code of Ethics and Conduct, or any other Department policies may result in disciplinary action, up to and including immediate termination.

Questions about the information contained in this Handbook should be directed to your immediate supervisor or HR. The City recognizes employees are its most important asset and appreciates their efforts and contributions in making Alpharetta a wonderful place for its citizens and visitors. For this reason, the City strives:

- To promote an environment of courteous and efficient responsiveness to the public on the part of all employees.

- To provide all employees an opportunity to discuss department concerns through open door communications with HR or the City Administrator.

- To promote a healthy, encouraging and inspirational work environment and to develop employees to their full potential and to utilize that potential in the most effective manner.

- To fully embrace the principle of Equal Employment Opportunity, ensuring all City policies, practices and programs are inclusive, and equally applied.

- To ensure compliance with all federal and state employment laws.

- To provide equitable and competitive compensation (wages and benefits) consistent with the City's economic ability.

- To encourage effective and efficient work performance from employees within the framework of reasonable work assignments.

- To maintain reasonable hours of work and provide safe conditions and healthy work environment.

- To communicate with all employees regarding matters which affect them in their work and future career with the City.

- To achieve the highest possible standards of public administration through sound HR practices.

EMPLOYEE RELATIONS PHILOSOPHY

Employees make our City strive. We are committed to attracting and retaining quality and talented employees like you. To accomplish this, we are committed to maintaining a competitive wage, benefit program and a positive and healthy work environment for all. We want to make our workplace as pleasant, inspiring, and rewarding as we can. Most importantly, we want you to feel free to talk with us at any time to provide your ideas and suggestions and trust your concerns will be heard.

Our success over the years is largely due to the way all levels of the organization work together. City employees are non-union, and this status allows us to treat each employee as an individual and to deal directly with you rather than through a third party who has no real stake in our City or the well-being of individual employees.

The City strives to maintain an "open door" policy of communications, whereby employees are free to ask questions, make suggestions and voice concerns, in a respectful manner, to each other, or to any level of management. The City encourages employees to come forward with questions about

City policies or any other aspect of employment. Employees should first discuss questions with a supervisor who has primary responsibility for resolving employee concerns and who has frequent knowledge of operational issues to address a solution. Supervisors, however, do not have the authority to amend or alter the administration or enforcement of personnel policies, and further personnel policy questions can be addressed with HR. The goal of this process is to afford due consideration of issues, concerns or suggestions and promote satisfactory resolution.

ETHICS & CONDUCT

The City is a "Certified City of Ethics." The City's Code of Ethics and Conduct is published in the municipal code and restated below. You must comply with the Code to the extent it impacts your job duties.

Act in the Public Interest: Recognizing that stewardship of the public interest must be their primary concern, employees will work for the common good of the people of the City and not for any private or personal interest, and they will assure fair and equal treatment of all persons, claims and transactions coming before the City.

Comply with the Law: Employees shall comply with the laws of the United States, the State of Georgia, and the City in the performance of their duties. These laws include but are not limited to: The United States and Georgia constitutions; laws pertaining to conflicts of interest, financial disclosures, employer responsibilities, and open processes of government; and City ordinances and policies.

Conduct of Employees: The professional and personal conduct of employees must be above reproach and avoid even the appearance of impropriety. Employees shall refrain from abusive conduct, personal charges or verbal attacks upon the character or motives of members of council, boards and commissions, the staff or public. Employees should maintain a reputation for serving equally and impartially all members of the City Council. To this end, employees should not engage in active participation in City election campaigns.

Respect for Processes: Employees shall perform their duties in accordance with the processes and rules of order established by the City Council and boards and commissions governing the deliberation of public policy issues, meaningful involvement of the public, and implementation of policy decisions of the City Council by City staff.

Conduct at Public Meetings: Employees shall prepare themselves for public issues and meetings; listen courteously and attentively to all public comments and decisions; and focus on the business at hand. They shall refrain from interrupting other speakers, making personal comments not related to the business of the body, or otherwise interfering with the orderly conduct of meetings.

Decisions Based on Merit: Employees shall base their decisions on the merits and substance of the matter at hand.

Communication: Employees shall publicly share substantive information that is relevant to a matter under consideration by the council or boards and commissions which they may have received from sources outside the public decision-making process.

Conflict of Interest: In order to assure their independence and impartiality on behalf of the common good, employees shall not use their official positions to influence government decision in which they have a material financial interest or personal relationship which may give the appearance of a conflict of interest. Where a conflict exists, an employee shall disclose the conflict and excuse themselves from participating in deliberations and decision-making regarding such matters.

Gifts and favors: No employee shall solicit or accept anything of value if it could reasonably be considered to influence the employee in the discharge of official duties. This prohibition shall not apply to an occasional nominal non-monetary gift, admission to a breakfast, lunch, dinner, function or event, or honorary or ex-officio memberships in civic organizations. For purpose of this policy, the term "nominal" shall mean having a value of less than $20.

Confidential information: Employees shall respect the confidentiality of information concerning City property, personnel or proceedings of the City. They shall neither disclose confidential information without proper legal authorization, nor use such information to advance their personal interests.

Use of public resources: Employees shall not use public resources not available to the public in general, such as City staff time, equipment, supplies or facilities, for private gain or personal purpose. Employees shall not utilize the City's name or logo for the purpose of endorsing any business or for any purpose that is not related to the activities or efforts of the City.

Representative of private interests: In keeping with their role as stewards of the public interest, employees shall not appear on behalf of the private interests of third parties before the council or any board or commission, or proceeding of the City, nor shall employees appear before the council on behalf of the private interests of third parties on matters related to the areas of service of their bodies.

Advocacy: Employees shall represent the official policies or positions of the City Council, boards and commissions to the best of their ability when designated as delegates for this purpose. When presenting their individual opinions and positions, employees shall explicitly state they do not represent the City and will not imply that they do.

Independence of boards and commissions: Because of the value of the independent advice boards and commissions provide to the public decision-making process, employees shall refrain from using their position to influence unduly the deliberations or outcomes of board and commission proceedings.

Positive workplace environment: Employees shall support the maintenance of a positive and constructive workplace environment for all City employees and for citizens and businesses dealing with the City.

PART 1 – EMPLOYEE MANUAL

This section discusses your responsibilities to the City as an employee. Please thoroughly familiarize yourself with these policies and apply them in your work. Compliance with these policies will help ensure efficient, productive, and pleasant atmosphere for you, your co-workers, and the ones we serve.

COMMUNICATIONS & IT RESOURCES

The City's Information Technology (IT) policies are an extension of this Handbook and provide additional guidance governing the use of City systems, networks, data, and devices, including any personal devices used for City business. While this Handbook outlines general expectations, the IT policies establish more specific standards and requirements related to technology use, security, and data protection.

Use of City IT resources is governed by IT Policies:

- 2.1 Acceptable Use of Information Technology Resources,
- 2.2 Acceptable Use of Artificial Intelligence and
- 2.3 User Cybersecurity Awareness and Training.

These policies are maintained separately and are available on the HR SharePoint site.

Because IT policies are updated periodically to address evolving technology, security risks, and operational needs, employees are responsible for reviewing and complying with the most current versions. In the event of any inconsistency between this Handbook and applicable IT policies, the IT policies will govern matters related to technology use.

Employees should have no expectation of privacy when using City systems, networks, or devices. Additionally, any device, whether City-issued or personal, used to conduct City business are subject to applicable public records laws and disclosure requirements.

Questions about IT policies, acceptable use, incidents, or access should be directed to the Department of Information Technology (DIT).

ARTIFICIAL INTELLIGENCE TECHNOLOGY

IT Policy 2.2 (Acceptable Use of Artificial Intelligence Technology) establishes the requirements for the secure, responsible, and ethical use of Artificial Intelligence (AI) tools in City operations. All employees, elected officials, contractors, volunteers, and third-party users must follow City IT policies, complete required AI and cybersecurity training, and promptly report any suspicious system behavior or potential misuse. The DIT maintains training records, conducts compliance monitoring, and may take corrective action for noncompliance. Violations of the policy may result

in disciplinary action, up to and including termination, and City Administration may update the policy at any time. Please refer to the full policy for detailed requirements and specific procedural guidance.

CYBERSECURITY

IT Policy 2.3 (Cybersecurity Awareness and Training) requires all users of City technology to participate in ongoing cybersecurity training, including periodic awareness materials and phishing simulations, to help protect City systems and information. Employees are required to promptly report any suspicious communications or unusual system activity. DIT maintains training records, monitors compliance, and reports noncompliance to supervisors and Human Resources by including documentation in the HRIS as part of the employee's personnel record. Failure to complete required training will impact performance evaluations and may result in disciplinary action, up to and including termination. Refer to the full IT policy for detailed requirements.

ELECTRONIC COMMUNICATIONS & DEVICES

Access to City Systems: Any connection to City networks, email, applications, or cloud services, whether from a City-issued device or a personal device used for City business, requires prior authorization from DIT.

Confidential Information: Confidential or proprietary information must only be accessed, stored, or transmitted on City Systems. Confidential information does not include employees' wages, hours or working conditions.

Device Management and Security: All City-issued mobile devices must remain enrolled in DIT's device-management systems and comply with DIT security standards at all times.

Eligibility and Issuance: City-issued devices are provided only when a documented business need exists. DIT has the final authority over the approval, issuance, configuration, and access of all devices. All users including full-time, part-time, temporary, seasonal employees and volunteers, must comply with all applicable IT Policies when using City Systems.

Personal Use: Limited, incidental personal use of City-issued devices is permitted only if it does not interfere with job duties, compromise security or conflict with City's policies. DIT may revoke personal use privileges at any time.

Use of Employee-Owned Devices: Employees may use personal electronic devices (such as mobile phones, earbuds, or other media devices) as long as the use does not interfere with job performance, safety, or professionalism. Supervisors may limit or prohibit use at any time if it becomes distracting or negatively affects the work environment. Certain devices or behaviors may also be restricted in customer-facing or field roles based on public perception. Employees are

expected to use sound judgment, stay focused on their duties, work safely, and maintain a professional presence at all times.

Use While Operating Vehicles and Equipment: Employees must comply with all applicable laws, including Georgia's Hands-Free Law, when using mobile devices while operating a vehicle or equipment on City business. Personal use of devices while operating City vehicles or equipment is prohibited. Any exceptions or additional requirements are outlined in the applicable IT Policies.

Consequences of Policy Violations: Violations of IT policies may result in disciplinary action, up to and including termination of employment, and may also subject the employee to civil liability or criminal prosecution. Where appropriate, the City may notify law enforcement or other relevant third parties and cooperate with any resulting investigations. The City prohibits retaliation against individuals who report potential violations or participate in investigations.

~~The City will provide cellphones and smartphone devices to employees and elected officials for business purposes, to be used as communications and computing tools including text messaging. Since their use and locally stored data may be subject to the State's Public Records Laws, there should be no expectation of privacy. Each user is responsible and accountable for the content and use of these tools. Should a personal device be used for business purposes, the employee must comply with public records laws including archival of data.~~

~~As a City employee or elected official, you are eligible to have a City cellphone or smartphone device if a valid City business purpose is identified and meets specific service criteria. However, due to financial constraints, meeting these criteria by itself does not guarantee participation. The cell phone and smartphone device administrator will process approval requests for these devices and related services.~~

~~Criteria for issuance/approval are as follows:~~

- ~~**Elected Official:** Requires ready access to City management and citizens in the conduct of your official duties.~~
- ~~**Management:** In a managerial role and a critical component of the job responsibilities is to be in contact with staff, citizens, or other management.~~
- ~~**Work Location:** The job often takes the employee away from their primary work location to complete work assignments.~~
- ~~**Emergencies/Public and Personal Safety:** Participates in the emergency response activities and could be called upon to solve critical issues that may arise during the day, or when possession of a cell phone or smartphone device may be necessary for an employee's personal safety.~~
- ~~**On-Call:** The employee is either on call or expected to respond to problems during non-business hours.~~

- Efficiency: Wireless phones and other wireless communication equipment should be provided to improve customer services and to enhance service efficiencies.

These devices may not be connected to the Internet, data network, or e-mail without review and approval from the department head and appropriate Information Technology Department contact.

City-owned cell phones and smartphone devices should be used primarily for business. There may be occasional instances where personal use is necessary.

City owned smartphones (those with data plans) and digital tablets will be remotely managed by the Information Technology Department. City users of these devices shall register their devices when requested, and to make no attempt to remove or alter profile or configuration settings pushed to their phones or digital tablets.

No City owned communication device is to be used outside the continental United States without prior permission from the users' Director or in the event of an emergency (just having your communication device turned on may incur roaming charges). If a Director approves such use by an employee, said Director shall immediately notify the Director of Information Technology of the approval. Employees who use their assigned communication device outside the continental United States may be required to pay for the international roaming charges at the discretion of the City.

No communication device that connects to the City network or receives Exchange information is to be altered or have its operating system replaced by using third party software.

The use of mobile communication devices while operating a motor vehicle is a violation of Georgia law. If communication is necessary, employees are required to drive safely out of the flow of traffic and stop the vehicle before using the communication device. While certain City vehicles may be approved for hands-free communication devices, no personal calls may be answered while operating a City vehicle or City equipment or driving on City business. The only exception to this policy shall be for law enforcement personnel actively engaged in law enforcement activities requiring secure communications (i.e. situations in which use of radio communications would compromise the law enforcement activity or compromise officer safety).

If you are responding to or working on an emergency scene as part of your job duties for the City, you may only use a personal communication device (including any recording or photo functions) if essential to the performance of your City job duties. You must use a City-owned device whenever possible.

ELECTRONIC COMMUNICATIONS

This policy contains guidelines for Electronic Communications created, sent, received, used, transmitted, or stored using City communication systems or equipment and employee provided systems or equipment used either in the workplace, during working time or to accomplish work

tasks. "Electronic Communications" include, among other things, messages, images, text data or any other information used in e-mail, instant messages, text messages, voice mail, fax machines, computers, smartphones (including Androids, iPhones and similar devices), telephones, cellular phones, including those with cameras, Internet access, and back-up storage, and information on a memory card, flash drive, or any other type of storage device. Given the degree of electronic devices and technology available, no list of electronic communications will be complete. In the remainder of this policy, all of these communication devices are collectively referred to as *Systems*.

Consent: Use of any City System is express consent to the terms of this and all other City policies as well as consent for the City to access, monitor, review, print, and distribute any communication contained in the Systems.

Acceptable Uses of Our Systems: Employees may use our Systems to communicate internally with co-workers or externally with citizens, suppliers, vendors, advisors, other business acquaintances, and the general public for business purposes. To maintain the efficiency of employees and our system, an employee must obtain Department Director pre-approval prior to sending bulk email to the "All Network Employees" distribution list or to all employees on the network.

City Control of Systems and Electronic Communications: All Electronic Communications contained in City Systems are City records and/or property. Although an employee may have an individual password to access our Systems, the Systems and Electronic Communications belong to the City. The Systems and Electronic Communications are accessible to the City at all times including periodic unannounced inspections. Our Systems and Electronic Communications are subject to use, access, monitoring, review, recording and disclosure without further notice. Our Systems and Electronic Communications are not confidential or private.

The City's right to use, access, monitor, record and disclose Electronic Communications created by any employee without further notice applies equally to employee-provided systems or equipment used in the workplace, during working time, or to accomplish work tasks. Even items that have been "deleted" can be traced and recovered.

Temporary, seasonal employees or volunteers working for the City will not be allowed direct access to City Systems. At the discretion of the Director of Information Technology, an exception can be made for a temporary, seasonal employee or volunteer of the City at the request of a Department Director citing the need for the individual to have access to City Systems to perform necessary work for City purposes. All of the requirements cited in the Electronic Communications of this Handbook are applicable to temporary, seasonal employees or volunteer who uses City Systems.

Personal Use of Our Systems: City-owned cell phones and smartphone devices should be used primarily for business. There may be occasional instances where personal use is necessary. Personal communications in our Systems are treated the same as all other Electronic Communications and will be used, accessed, recorded, monitored, and disclosed by the City at any time without further notice. Since all Electronic Communications and Systems can be accessed without advance notice, you should not use our Systems for communication or information that you would not want revealed to third parties.

~~Use of Employee-Owned Devices: You may own various types of personal electronic devices such as earphones, music players, video devices, cell phones, etc. You may only use such items during working time in a manner appropriate for your job duties and expected productivity and professionalism. Generally, earphones, music and video players present a work distraction, their use is perceived as unprofessional, and it should be avoided during work time. Given the extent of devices and technology available, no list of unprofessional conduct will be complete, and you should know that the City may prohibit the use of any device at any time. The City expects you to be focused on working, working safely, appearing professional at all work times, and being as productive as possible.~~

~~Confidential Information: Confidential and/or proprietary information may only be used on City Systems. Confidential and/or proprietary information may not be downloaded, saved, or sent to a personal laptop, personal storage device, or personal email account under any circumstances without advance written approval. Confidential information does not include your wages, hours or working conditions.~~

~~Prohibited Uses of Our Systems: You may not use our Systems in a manner that violates City policies, including, but not limited to No Harassment, Equal Employment Opportunity, Confidential Information, Business Records, and No Solicitation. You may not use our Systems in any way that unreasonable compromises your productivity or the overall integrity or stability of the City's Systems or would be considered obscene or offensive. Examples of prohibited uses include, among other things, sexually explicit messages, images, cartoons or jokes, propositions or love letters, ethnic or racial slurs, or any other message or image that may be in violation of City policies.~~

~~In addition, employees shall not use our Systems:~~

- ~~To download, save, send, or access any material which may be considered defamatory, discriminatory or obscene.~~
- ~~To download, save, send, or access any music, audio or video file unless necessary for business.~~
- ~~To download anything from the internet (including shareware or free software) without the advance written permission of the Director of Information Technology or his or her designee.~~
- ~~To download, save, send, or access any site or content that the City might deem "adult entertainment".~~
- ~~To text message or instant message for non business purposes on our System on working time.~~
- ~~To attempt or to gain unauthorized or unlawful access to computers, equipment, networks, or Systems of the City or any other person or entity.~~
- ~~In connection with any infringement of intellectual property rights, including but not limited to copyrights.~~
- ~~In connection with the violation or attempted violation of any law; and~~
- ~~To transmit sensitive or confidential or client material, such as pricing information or trade secrets.~~

Devices and Software: Employees or others shall not attach privately owned devices to the City computer networks, or to any City owned systems. This includes printers, mobile devices, and any device that can be connected with a USB/Serial connection. If you believe you have extenuating reasons for connecting a privately owned device, you must obtain approval from your Department Director who, in turn, will secure the permission of the Director of Information Technology.

Likewise, no personal software of any kind can be loaded on City owned equipment or systems. Only software purchased and provided by the City can be installed. If you believe you have extenuating reasons for installing your own software, you must obtain approval from your Department Director. The Department Directors must contact the Director of Information Technology prior to granting approval for a personal device or personal software.

Electronic Forgery: An employee shall not misrepresent, disguise, or conceal his or her identity or another's identity in any way while using Electronic Communications; make changes to Electronic Communications without clearly indicating such changes; or use another person's account, mailbox, password, etc. without prior written approval of the person and without identifying the actual author.

Intellectual Property Rights: Employees must always respect intellectual property rights such as copyrights and trademarks.

System Integrity, Security, and Encryption: All Systems passwords and encryption keys must be available and known to the City. Employees shall not install password or encryption programs without the written permission of our Director of Information Technology or her/his designee. Employees may not use the passwords and encryption keys belonging to others.

Applicable Laws: Numerous state and federal laws apply to Electronic Communications. The City will comply with applicable laws. Employees also must comply with applicable laws and should recognize that an employee could be personally liable and/or subject to fine and imprisonment for violation of applicable laws.

Individual Accountability: Individual accountability is required when accessing all IT resources and City information. Everyone is responsible for protecting against unauthorized activities performed under their user ID. This includes locking your computer screen when you walk away from your system, and protecting your credentials (e.g., passwords, tokens or similar technology) from unauthorized disclosure. Credentials must be treated as confidential information and must not be disclosed or shared.

User Responsibility for IT Equipment: Users are routinely assigned or given access to IT equipment in connection with their official duties. This equipment belongs to the City and must be immediately returned upon request or at the time an employee is separated from the organization. Users may be financially responsible for the value of equipment assigned to their care if it is not returned to the organization. Should IT equipment be lost, stolen or destroyed, users are required to provide a written report of the circumstances surrounding the incident. Users may be subject to disciplinary action which may include repayment of the replacement value of the equipment. The City has the

~~discretion to not issue or re-issue IT devices and equipment to users who repeatedly lose or damage IT equipment.~~

~~Consequences of Policy Violations: Violations of this Policy may result in disciplinary action up to and including immediate termination of an employee's employment as well as possible civil liabilities or criminal prosecution. Where appropriate, the City may advise legal officials or appropriate third parties of policy violations and cooperate with official investigations. The City will not, of course, retaliate against anyone who reports possible policy violations or assists with investigations.~~

~~Questions: If you have questions about the acceptable use of our Systems or the content of Electronic Communications, ask your Department Director for clarification in advance of using our system.~~

NO-SOLICITATION – NO DISTRIBUTION – DIGITAL & PHYSICAL BULLETIN BOARDS

Solicitation either verbal or electronically by employees for any purpose (e.g., for money, goods or services, including selling products, or to contribute to, join, or support any organization, endeavor, or project) is not permitted during work time.

Distribution or circulation of literature or printed material by employees is not permitted during work time. Distribution or circulation of such material will not be permitted at any time (whether work or non-work time) in work areas as defined by the Department Director.

"Work time" refers to that portion of any workday during which the employee engaged in solicitation or distribution and or/the employee being solicited or receiving the distribution is supposed to be performing any actual job duties. It does not include other, duty-free periods of time, such as lunch or break periods.

"Work areas" refers to areas of City property where employees normally perform work, or where work is in fact being performed.

Solicitation and the distribution of literature by non-employees on City property is strictly prohibited.

SharePoint & Bulletin Boards: The City maintains physical bulletin boards at various locations and digital postings on the City's SharePoint sites as sources of official information. These channels are used exclusively for notices approved by the City regarding policies, regulations, City operations, and other matters relevant to employees' work and employment.

Employees are encouraged to check both the physical bulletin boards and SharePoint regularly to stay informed. Only the City Administrator, Department Directors, or their designees may post notices. Employees are not permitted to post materials or remove, deface, or alter any information posted by the City.

~~The City maintains bulletin boards at various locations as an important information source. These bulletin boards are to be used solely to post information approved by the City regarding City policies, governmental regulations, and other matters of concern to all employees which are related to the employees' employment by the City.~~

~~Please form a habit of checking the bulletin boards daily so that you will be familiar with the information posted there. Only the City Administrator, Department Directors or their designees can post notices on the bulletin board. Employees cannot post notices on the bulletin board and must not remove, deface or damage materials posted by the City.~~

SOCIAL MEDIA ~~NETWORKING & ELECTRONIC MEDIA~~

The following is the City's social networking and electronic media policy. The absence of, or lack of explicit reference to a specific site does not limit the extent of the application of this policy. Where no policy or guideline exists, employees should use their professional judgment and take the most prudent action possible. Consult with the City's Communication & Engagement Manager (CEM) or supervisor if you are uncertain. Nothing in this policy is intended to restrict or interfere with employees' rights to engage in protected concerted activity under Section 7 of the National Labor Relations Act.

Personal Use of Social Media: Employees must use personal social media responsibly, recognizing that online activity can reflect on both the individual and the City and may impact professional reputation. Staff should use good judgment when posting, understand that online content can be copied or stored in ways that cannot be fully retracted, and avoid sharing identifying information about City employees (such as names, photos, videos, uniforms, titles, or logos) without permission.

Personal content must not be mistaken for official City communication, when appropriate, employees should include a disclaimer such as: "The views expressed are those of the author and do not necessarily reflect those of the City of Alpharetta."

Off-duty posts may still be perceived as representing the City, and employees may be held personally liable for inappropriate or unlawful content. Personal social media accounts shall not be used for City business unless authorized by the CEM. Employees must also follow strong cybersecurity practices, including those outlined in applicable IT Policies.

Use of Social Media within the Scope of Official Duties: Social media enables the City to share information, facilitate public dialogue, and engage the community regarding City issues, operations, and services. Any use of public social media platforms to represent the City requires written pre-approval from the CEM or designee, consistent with applicable IT Policies. All official City communications posted to social media must follow the City's established approval processes, public records requirements, content standards, and the general guidelines:

1. All posted or submitted content is subject to public disclosure, and each site must clearly indicate this requirement.

2. Site moderators may restrict or remove content that is off-topic, violates the City's Terms of Use, or is otherwise prohibited; removed content must still be retained under the appropriate retention schedule.

3. Each City social media site must include a brief statement describing its purpose and, when appropriate, link back to the City's official website.

4. Moderators must be trained on their responsibilities and the operational requirements of this policy.

5. All official City social media accounts must display the City's Limited Public Forum notice.

6. Employees representing the City on social media must conduct themselves professionally and comply with all City policies.

7. Technical, security, and account-management requirements for official City social media accounts are governed by IT Policy 2.1.

8. Each site must clearly identify that it is maintained by the City of Alpharetta and provide appropriate contact information.

9. Passwords of accounts must follow information security standards, be unique on each site, and must not be the same as passwords used to access other IT resources.

10. Each site shall include an introductory statement which clearly specifies the purpose and topical scope of the site. Where possible, sites should link back to the official City website site for forms, documents and other information.

11. All City social networking accounts must include in its "About" or "Legal" information or in another prominent location the following statement:

This is an official social media account of the City of Alpharetta, Georgia. The page is established and maintained for the purpose of communicating valuable information to our citizens and others who have a passion or interest in this great community and to provide a limited forum through which citizens can engage constructively in discussions about community issues specific to Alpharetta. While we welcome differing opinions, those choosing to engage in discussion and discourse via this page are expected to do so in a respectful manner. We reserve the right to restrict, remove, or delete any comment or post that violates our Terms of Use Guidelines.

TERMS OF USE GUIDELINES
Prior to posting comments on this Limited Public Forum, users must review and agree to the Terms of Service of {insert social media platform} and also the Terms of Use of the City of Alpharetta {insert social media platform} page. A submitted comment or posting on this page shall constitute an acknowledgment and agreement of these terms of use. Consistent with the purpose of this Limited Public Forum, prohibited content includes, but is not limited to, comments or post which contain:

- *Profanity, obscenity, or sexual content.*

- *Discriminatory language or language that promotes discrimination based on race, color, creed, age, gender, religion, physical or mental disability, or sexual orientation.*
- *Commercial solicitations.*
- *Links to external websites.*
- *SPAM - Unwanted, unsolicited, repetitive, or irrelevant messages, often sent in bulk.*
- *Personal identifying information, including but not limited to personal addresses, personal health information, or the name of a victim of a crime, which is not subject to being released under open records law.*
- *Words that incite, encourage, or solicit violent or illegal acts; and/or*
- *Language or comments that are unrelated to the topic of this account.*

NOTE: The City prohibits comments that include links to external websites or URLs in the interest of protecting page visitors from malicious websites, malware, and other cybersecurity threats.

Social Media Posting Standards: Comments submitted by members of the public must be directly related to the content of the article. Submission of a comment constitutes participation in a limited public forum. Site moderators shall allow comments that are topically related to the article and within the purpose of the limited public forum, except for content prohibited under the Terms of Use Guidelines listed above.

1. All City posting authors and public commentators shall be clearly identified. Anonymous postings are prohibited.
2. Enrollment of public commentators shall be accompanied by valid contact information, including a name, address, and email address.
3. The content of each City social media site shall be owned by and the sole responsibility of the department producing and using the site.
4. All articles and comments shall be reviewed and approved by an authorized moderator before posting on a City social media site.
5. Any posted hyperlinks shall be accompanied by a disclaimer stating that the City guarantees neither the authenticity, accuracy, appropriateness nor security of the link, web site or content linked thereto.
6. Any posting that contains a high percentage (>30%) of AI generated content must include an attribution of the AI used. Any image or video used must include the attribution. For additional guidance, reference IT Policy 2.2.
7. All posting must respect intellectual property rights and ensure that the use of Artificial Intelligence does not infringe on copyrights, patents, or other proprietary rights. For additional guidance, reference IT Policy 2.2

Employee Guidance for Official Participation in Social Media: Employees who participate in social media as part of their official City duties must follow these guidelines:

1. Follow all applicable City policies, standards of conduct, and City rules when engaging in social media activity on behalf of the City.
2. Communication using a City email address or otherwise presented in an official capacity constitutes City business and must align with approved messaging.
3. Employees may participate in official social media activity only when authorized by their Department Director and the CEM.
4. Protect the privacy of coworkers, citizens, and stakeholders by safeguarding confidential, sensitive, and legally protected information.
5. Comply with all applicable laws, including public records, retention, copyright, privacy, and disclosure requirements.
6. Do not reference or identify vendors, citizens, coworkers, or other stakeholders without proper permission.
7. Maintain professional standards at all times; avoid unprofessional, inflammatory, discriminatory, or inappropriate content.
8. Correct errors transparently—do not alter or delete prior posts without acknowledging the correction.

For additional guidance on the use of social media, please refer to IT Policies 2.1, 2.2 and 2.3, available on the HR SharePoint site.

~~The following is the City's social networking and electronic media policy. The absence of, or lack of explicit reference to a specific site does not limit the extent of the application of this policy. Where no policy or guideline exists, employees should use their professional judgment and take the most prudent action possible. Consult with your manager or supervisor if you are uncertain. This policy is not intended to prohibit or chill employee rights protected by Section 7 of the National Labor Relation Act.~~

~~Personal Use of Social Media:~~

~~1. Social media activities must not interfere with work duties and responsibilities. Please refer to the "Electronic Communications" section of the Employee Handbook for additional restrictions regarding personal use of City systems.~~

~~2. The online presence of employees reflects upon the City. Be aware that your actions captured via images, posts, and / or comments can impact the public's view of you and of the City and can impact the ability to effectively carryout the business of the City.~~

3. Do not reference or cite City officials, citizens, vendors, customers, or partners without their expressed written consent. Please refer to the "Confidential Information" and the "Ethics and Conduct" section of this Handbook for additional restrictions and guidelines.

4. At no time may the City logo or other trademarked images be used.

Violations of these policies and / or any online activity that interferes with the ability to conduct the business of the City may result in disciplinary action up to and including termination of employment.

Use of Social Media for Official Communications and Business: City departments may, upon approval by the Assistant City Administrator or designee, utilize social media and social network sites to further enhance communications with various stakeholder organizations in support of City goals and objectives. City officials and City organizations have the ability to publish articles, facilitate discussions and communicate information through various media related to conducting City business. Social media facilitates further discussion of City issues, operations and services by providing members of the public the opportunity to participate in many ways using the Internet.

All official social media postings, replies, and comments by the City will be done solely on officially approved City social media sites by authorized users. Employees and officials must have prior authorization from the City Administrator or designee to act as a spokesperson for the City before posting official comments regarding City related business on social media sites.

Definitions:
For the purpose of this City policy regulating the use of social media for official communications and business, the following terms are defined as follows:

- Social Media: Social media is content created by individuals using accessible and scalable technologies through the Internet. Examples of social media include Facebook, blogs, RSS, YouTube, Twitter, LinkedIn, Instagram, Nextdoor, etc.
- Blog: (an abridgment of the term web log) is a City website with regular entries of commentary, descriptions of events, or other material such as graphics or video.
- City of Alpharetta author: An authorized City of Alpharetta official that creates and is responsible for posted articles and information on social media sites (see definition of "Article" below).
- Article: An original posting of content to a City social media site by a City of Alpharetta author (see definition of "Author" above).
- Commenter: A City official or member of the public who submits a comment for posting in response to the content of a particular City of Alpharetta article or social media content.
- Comment: A response to a City article or social media content submitted by a commenter.
- City of Alpharetta moderator: An authorized City official, who reviews, authorizes and allows content submitted by City of Alpharetta authors and public commentators to be posted to a City social media site.

~~Policy:~~

~~The use of social media as a tool for official communication by City officials and representatives shall adhere to the following rules and guidelines:~~

~~1. All City social media sites shall be:~~

~~A. Approved by the Assistant City Administrator, or designee, and the requesting Department Director; and~~

~~B. Published using approved City social networking platform and tools; and~~

~~C. Administered by the City Office of Public Information or their designee. Designees can be any department employee or volunteer designated by the requesting Department Head and approved by the Assistant City Administrator that has a complete understanding of this policy and has appropriate content and technical experience.~~

~~2. All City social networking sites shall adhere to applicable state, federal and local laws, regulations and policies including all City records retention and other applicable policies.~~

~~3. City social networking sites are subject to Georgia Open Records Laws. Relevant City of Alpharetta and Georgia records retention schedules apply to social networking content. Records required to be maintained pursuant to a relevant records retention schedule shall be maintained for the required retention period in a format that preserves the integrity of the original record and is easily accessible using the approved City platforms and tools.~~

~~4. All social network sites and entries shall clearly indicate that any articles and any other content posted or submitted for posting are subject to public disclosure.~~

~~5. Content submitted for posting that is deemed not suitable for posting by a City social networking moderator because it is not topically related to the particular social networking site objective being commented upon, or is deemed prohibited content based on the criteria in Policy: Item 8 of this policy, shall be retained pursuant to the records retention schedule along with a description of the reason the specific content is deemed not suitable for posting.~~

~~6. The City reserves the right to restrict or remove any content that is deemed in violation of this policy or any applicable law.~~

~~7. Each City social networking site shall include an introductory statement which clearly specifies the purpose and topical scope of the blog and social network site. Where possible, social networking sites should link back to the official City website site for forms, documents and other information.~~

~~8. All City social networking accounts must include in its "About" or "Legal" information or in another prominent location the following statement:~~

~~*This is an official social media account of the City of Alpharetta, Georgia. The page is established and maintained for the purpose of communicating valuable information to our citizens and others who have a passion or interest in this great community and to provide a limited forum through which citizens can engage constructively in discussions about community issues specific to Alpharetta. While we welcome differing opinions, those choosing to engage in discussion and*~~

discourse via this page are expected to do so in a respectful manner. We reserve the right to restrict, remove, or delete any comment or post that violates our Terms of Use Guidelines.

TERMS OF USE GUIDELINES

Prior to posting comments on this Limited Public Forum, users must review and agree to the Terms of Service of {insert social media platform} and also the Terms of Use of the City of Alpharetta {insert social media platform} page. A submitted comment or posting on this page shall constitute an acknowledgment and agreement of these terms of use. Consistent with the purpose of this Limited Public Forum, prohibited content includes, but is not limited to, comments or post which contain:

- *Profanity, obscenity, or sexual content.*
- *Discriminatory language or language that promotes discrimination based on race, color, creed, age, gender, religion, physical or mental disability, or sexual orientation.*
- *Commercial solicitations.*
- *Links to external websites.*
- *SPAM.*
- *Personal identifying information, including but not limited to personal addresses, personal health information, or the name of a victim of a crime, which is not subject to being released under open records law.*
- *Words that incite, encourage, or solicit violent or illegal acts; and/or*
- *Language or comments that are unrelated to the topic of this account.*

NOTE: The City prohibits comments that include links to external websites or URLs in the interest of protecting page visitors from malicious websites, malware, and other cybersecurity threats.

9. All City social networking moderators shall be trained regarding the terms of this policy, including their responsibilities to review content submitted for posting to ensure compliance with the policy.

10. All social networking sites shall clearly indicate they are maintained by the City and shall have City of Alpharetta contact information prominently displayed.

11. Where appropriate, City Information Technology security policies shall apply to all social networking sites and articles.

12. Employees representing the City government via social media outlets must conduct themselves at all times as a representative of the City and in accordance with all human resource policies.

13. Employees found in violation of this policy may be subject to disciplinary action, up to and including termination of employment.

Blog Standards:

Comments submitted by members of the public must be directly related to the content of the articles. Submission of comments by members of the public constitutes participation in a limited public forum. City of Alpharetta blog moderators shall allow comments that are topically related to the particular article being commented and thus within the purpose of the limited public forum, with the exception of the prohibited content listed in Policy: Item 8 above.

1. Author and Commenter Identification

A. All City blog authors, and public commentators shall be clearly identified. Anonymous blog postings shall not be allowed.

B. Enrollment of public commentators shall be accompanied by valid contact information, including a name, address, and email address.

2. Ownership and Moderation

A. The content of each City blog shall be owned by and the sole responsibility of the department producing and using the blog.

B. Documents and articles submitted to a City blog shall be moderated by an authorized and trained blog moderator.

3. Blog Comments & Responses

1. All blog articles and comments shall be reviewed and approved by an authorized blog moderator before posting on a City blog.

2. All blog articles and comments submitted for posting with attached content shall be scanned using antivirus technology prior to posting.

3. The linked content of embedded hyperlinks within any City blog articles or blog comments submitted for posting shall be evaluated prior to posting. Any posted hyperlinks shall be accompanied by a disclaimer stating that the City guarantees neither the authenticity, accuracy, appropriateness nor security of the link, web site or content linked thereto.

Employee Guidance for Official Participation in Social Networking:

The City understands that social networking and Internet services have become a common form of communication in the workplace and among stakeholders and citizens. Social networks are online communities of people or organizations that share interests and/or activities and use a wide variety of Internet technology to make the interaction a rich and robust experience. Employees that choose to participate in social networks in their official capacity as a City employee shall adhere to the following guidelines:

- City policies, rules, regulations and standards of conduct apply to employees that engage in social networking activities while conducting City business. Use of your City e-mail address and communicating in your official capacity will constitute conducting City business.
- City employees shall secure the written permission of their Department Director and the Assistant City Administrator prior to creating a social networking site or service to conduct City business.

- ~~Departments have the option of allowing employees to participate in approved, existing (see Employee Guidance for Participating in Social Networking: Item 2) social networking sites as part of their job duties. Department Directors may allow or disallow employee participation in such social networking activities in their departments.~~
- ~~Protect your privacy, the privacy of citizens, and the information the City holds. Follow all privacy protection laws, (e.g. HIPPA) and protect sensitive and confidential City information.~~
- ~~Follow all copyright laws, public records laws, retention laws, fair use and financial disclosure laws and any other laws that might apply to the City or your functional area.~~
- ~~Do not cite vendors, suppliers, clients, citizens, co-workers or other stakeholders without their approval.~~
- ~~Do not use ethnic slurs, profanity, personal insults, or engage in any conduct that would not be acceptable in the City's workplace. Avoid comments or topics that may be considered objectionable or inflammatory.~~
- ~~Correct your mistakes, and don't alter previous posts without indicating that you have done so. Frame any comments or opposing views in a positive manner.~~
- ~~Add value to the City through your interaction. Provide worthwhile information and perspective.~~

COMPENSATION

ACTING PAY

When an employee temporarily assumes the responsibilities of a higher-level (pay grade) position, requiring greater professional responsibility, technical skills and competence, the employee has assumed an acting appointment.

Employees assigned to an acting status for less than 14 days are not eligible for any additional benefits or compensation associated with the position they are acting for. In the event it is necessary to place an employee in an acting position for a period of time greater than 14 calendar days, the Department Director may grant a temporary acting pay rate if it is determined to be in the best interest of the City.

ADDING NEW POSITIONS TO THE PAY PLAN

In order to achieve the goals and objectives of the organization, it is sometimes necessary to add new classifications or to modify the organizational structure. This often results in responsibilities being redistributed.

The evaluation of new positions for placement in the appropriate pay grade will be done at the beginning of the recruitment process or in conjunction with budget process twice a year. The HR Department will conduct an evaluation process to determine at which pay grade the new position should be placed. The process will include the development of a job description, the completion of a job analysis questionnaire by the supervisor, and the evaluation of the position using the City's

formal job evaluation tool. All new positions causing increase in the number of approved positions (Full-Time Equivalent - FTEs) in the City's position control must be approved by Mayor and Council.

APPOINTMENT RATE

New hires will generally be offered a salary in the first quartile of the pay grade.

In certain circumstances, when determining the appropriate salary for the candidate, Department Directors are authorized to offer up to 90% of the midpoint of the pay grade classification assigned by HR. The determination will be based, and justified, upon candidate's education, experience, knowledge, skills, and abilities. Directors will be required, however, to provide written justification for any salary above 20% of the position minimum and secure approval from HR before offers are made.

New hire salaries will also take into consideration the compensation of current employees in similar grades and positions within the City, the candidate's relevant education and experience, and the results of an internal equity review conducted by HR. New hire compensation will be determined by the Director of HR in consultation with the Department Director. Compensation above the midpoint of the grade will also require approval of the City Administrator.

DEMOTIONS

Demotions are defined as a non-voluntary assignment to a position in a lower rank and/or pay grade. Should an employee be demoted, their adjusted salary will be determined on a case-by-case basis by the HR Department in consultation with the Department Director. Absent approval from the City Administrator, the new salary will not be less than the minimum or exceed the maximum of the new pay grade assignment.

EQUITY ADJUSTMENTS

From time to time, it may be necessary to adjust an employee's compensation in order to correct internal compensation inequities. Equity adjustments may be necessary in order to appropriately differentiate compensation between new hires and long-term employees, supervisors and subordinates, and/or similar situations.

Equity adjustments will be carefully evaluated for the impact on the employee, the supervisor, subordinates, and similarly classified positions. All equity adjustments must be approved by the Director of HR and the City Administrator.

EMPLOYEES PAID OUTSIDE PAY RANGE

It is possible that an employee may be found to be paid below the minimum of their pay grade or above the maximum due to changes in market conditions. If an employee's pay is below the minimum of their pay grade, their pay will be adjusted up to the minimum as soon as practical. If an employee's pay falls above the maximum of their pay grade, their pay will be frozen until such time as market conditions increase the pay grade maximum above their current pay. Employees who reach or exceed the maximum of their pay range, for any reason, will remain at that maximum until either:

1. they are promoted to a higher pay range, or
2. the pay range maximum increases.

Only merit increases (see Pay for Performance) are eligible for lump-sum payments above the maximum of the range.

INTERNAL EQUITY

The City is committed to maintaining fair and equitable compensation practices. An internal equity review is conducted by HR when determining new hire salaries, promotions, reclassifications, or other compensation adjustments. This review considers labor market, the compensation of current employees in similar pay grades and positions, the employee's education, experience, knowledge, skills, and abilities, and other relevant factors to ensure consistency and fairness within the organization. All compensation decisions must align with the results of the internal equity review and require approval from the Director of HR to ensure equitable treatment of employees across the City.

PAY FOR PERFORMANCE

Movement through the pay grade will be based on performance. Increases will be calculated based upon the budget and employee performance ratings. Performance based salary adjustments within a pay range are typically awarded at the beginning of the City's Fiscal Year of each year. Employees must have at least 6 months of service, and being present at work for at least 6 months of the evaluation period, to be considered for an adjustment.

In the event an employee is currently earning at or in excess of the maximum base-pay compensation applicable to the relevant position, any performance-based pay increase shall not be added to base pay, but rather the lump-sum shall be paid in bi-weekly installments, along with the regular paychecks.

In the event that an employee is currently earning near the maximum base-pay compensation and a proposed performance-based compensation adjustment would increase the employee's base-pay compensation above the relevant pay range for the employee's position, then: a) the employee's base-pay shall be increased to the maximum of the applicable range; and, b) any remaining portion of the performance-based pay increase shall be paid out in bi-weekly installments, along with the regular paychecks.

POSITION CONTROL OVERFILL

From time to time, it may be in the best interest of the City's to overfill a position classification due to imminent vacancy (i.e., written retirement/separation letter indicating last day of employment). Such cases are to allow a smooth transition of personnel and the continuation of expected service level.

Overfill assignments may be granted for a period up to 120 calendar days. Employee overfilling the position will receive title and compensation appropriate for the position they are overfilling. This is not an interim or acting position. Overfill only affects the employee filling the imminent vacancy. No trickle-down effect will be allowed to fill other rank positions (no acting assignments/pay). Trickle-down actions (filling or promoting of lower-ranked positions that are impacted by the overfill) are only permitted when:

- The overfill assignment does not result in a net increase in cost; specifically, if the employee filling the imminent vacancy receives a pay adjustment, their new pay does not exceed the pay of the outgoing employee; and
- There is a documented operational need for immediate backfill; and
- The department can manage the movements within existing budget resources.

Overfill positions must be approved by HR prior to filling the role. Requests to overfill positions will be accompanied by a memo from the Department Director stating in detail the reason for the overfill. The memo should also address overfill costs and how it will be funded, which in most cases should be covered with salary savings from the outgoing incumbent.

PROMOTIONS

A promotion is defined as a non-temporary assignment to a position in a higher pay grade. Typically, when an employee is selected for a promotion, their rate of pay will be assigned in the new grade at a rate at least 5% higher than their previous rate of pay.

In certain circumstances, when determining the appropriate salary for the candidate, Department Directors are authorized to offer up to 90% of the midpoint of the pay grade classification assigned by HR, only when the proposed compensation is consistent with an internal equity review conducted by HR. The determination will be based, and justified, upon candidate's education, experience, knowledge, skills, and abilities. Directors will be required, however, to provide written justification for any salary above 20% of the position minimum and secure approval from HR before offers are made.

Promoted employees will not be assigned at a rate of pay below the minimum or above the maximum of the new grade. All promotions and the initial salary level in the new position require approval of the Director of HR and City Administrator.

The City makes every effort to promote and fill open positions from within whenever possible. If you are interested in a different position within the City, be sure to let HR and your Department Director know well in advance. You do not need to wait for an opening to share this information with us. Be sure to keep HR and your Department Director informed about your professional development and your career goals.

You will need to formally apply for an open position for which you are qualified. Please check the City's website at https://www.governmentjobs.com/careers/alpharetta for information about open positions. Internal candidates will participate in the recruitment process in the same manner as outside applicants. Please see *Hiring & Selection*, for more information.

REASSIGNMENTS

Voluntary acceptance of a reassignment to a position having a lower assigned pay grade shall result in the employee's salary being set at a rate of pay within the new pay grade. Should an employee be reassigned, their adjusted salary will be determined on a case by case basis by the HR Department in consultation with the Department Director. Absent approval from the City Administrator, the new salary will not be less than the minimum or exceed the maximum of the new pay grade assignment.

RECLASSIFICATION

A reclassification is defined as a situation where a job's duties, responsibilities, and level of authority in the organization have changed significantly. Department Directors may, at their discretion, request HR to re-evaluate the classification of a position if, in their opinion, the job has changed significantly. Changes in the volume of work that do not result in a significant change to the nature of the job will not be considered for re-evaluation. The process for re-evaluating jobs will be consistent with the process for evaluating new jobs. Reclassification evaluations will be done at the beginning of the recruitment process or in conjunction with budget process twice a year.

In the case of a reorganization or redistribution of duties and responsibilities, duties added to one job may be accompanied by a reduction in responsibilities to another job. Reclassifications and changes in pay grade assignments will be made both upward and downward. All reclassifications must be approved by the Director of HR and City Administrator.

STATUS CHANGES AND PAY CYCLES

All employment status changes involving change in position classification, transfers, or pay, are to be effective no earlier than the first of the pay period following the event and the notification of HR and receipt of necessary documentation. This includes level achievement, promotion, demotion, transfers, acting status, reclassifications, and pay incentives.

TRANSFERS

A transfer is defined as the movement of an employee from a position in one pay grade to a different position in the same pay grade. If an employee is awarded a transfer, they may retain the same rate of pay regardless if the transfer entails a change of department or division. Pay increases will only be awarded based upon experience and qualifications directly related to the new position.

DISCIPLINE & GRIEVANCE PROCEDURE

DISCIPLINE PROCEDURE

It is the expectation and responsibility of all City employees to conduct their day-to-day activities in a businesslike manner, within established rules of good conduct and professionalism while adhering to the City's core values. Violations require appropriate action by supervisory personnel as specified in this and other sections of this Handbook. The City strives to ensure consistent application of discipline procedures and fair treatment of all employees.

When deemed appropriate, the City will attempt to counsel and coach employees before taking any disciplinary action up to and including terminating employment. Depending on the circumstances, it may be appropriate to counsel an employee regarding his or her performance deficiencies or conduct versus issuing disciplinary action. In those situations, if the counseling does not result in an improvement or the misconduct continues, disciplinary action may be taken to address the issue.

The following disciplinary actions are generally used by the City when needed to correct employee conduct or performance. However, nothing stated herein limits the discretion of the City to impose any level of discipline within the "at-will" employment relationship between the City and its employees.

The forms of discipline include the following:

- Coaching Session (Verbal Warning): This action documents a serious discussion between the supervisor and employee. The supervisor will document the specific reasons for the formal coaching session and steps to be taken to correct the issue.

- Written Notice~~Warning~~: This action is generally used in response to conduct that a supervisor deems to be a more serious violation or where the coaching session has not resulted in a satisfactory change in the employee's performance. This action is typically the final warning issued before a suspension without pay is imposed.

- Suspension: When deemed appropriate by the City or when a reprimand has already been issued, an employee may be suspended without pay. Suspensions will be based on the normal full work shift of the employee and must be served concurrently and on scheduled workdays. As a compliance with FLSA regulations, exempt employees may only be suspended in full day increments.

- Termination: Termination from employment is issued where conduct, behavior or performance has not improved to a satisfactory level after counseling and disciplinary actions, or where the circumstances and severity of the offense warrant termination.

Disciplinary action may be reviewed by the HR Department and HR serves as an advisory to supervisors in disciplinary cases. Disciplinary action at the level of Suspension or Termination must receive prior approval from the Director of HR. Employees in their introductory period may be disciplined at any level, up to and including termination.

The following list of unacceptable actions/behaviors has been developed and may serve as the basis for any level of discipline. While specific, this list is not intended to be all-inclusive. Any serious misconduct will result in disciplinary action, up to and including termination from employment.

- Poor work performance or inefficiency.

- Unacceptable attendance (absence or tardiness).

- Loafing or sleeping on the job. (Excludes firefighters assigned to a 24-hour shift to the extent permitted by department work rules).

- Unauthorized absence from the work area on a scheduled workday.

- Any conduct inconsistent with good customer relations found offensive to the general public or other employees.

- Threatening, intimidating, assaulting or coercing another employee.

- Creating unsafe or unsanitary work conditions.

- Refusal to cooperate or provide truthful information during an officially sanctioned investigation.

- Disregard for one's appearance, attire or personal hygiene.

- Inducing another employee to violate any City policy or department rules and regulations.
- Violations of City policy or department rules and regulations.
- Negligence in the performance of work duties.
- Negligent or deliberate waste or damage of City property.
- Failure to comply with established safety rules.
- Using City time for political activities.
- Misuse or illegal use of City equipment or tools including but not limited to telephones, computer systems, copiers, printers, vehicles, or machinery.
- Unauthorized solicitation or distribution by an employee during work hours.
- Failure to report the use of prescription drugs that may impair the employee's ability to perform work safely.
- Failure to report an accident involving damage to City property or the property of others, or from which injuries to employees or to others have resulted.
- Failure to report an incident or situation that could result in injury to persons or damage to property.
- Activity that may constitute a criminal offense or violation of a City ordinance which inhibits the employee from performing their duties, reflects negatively on the image of good public service, or damages the credibility of the employee in the performance of their responsibilities.
- Falsification or misrepresentation of records or information, including timesheets, medical and insurance forms, employment applications, purchase orders, employment records, and other documents and materials.
- Insubordination - refusal or disregard for a supervisor's instructions.
- Consumption, possession, manufacture, or being under the influence of alcohol or controlled substances while on duty or upon reporting to duty.
- Theft or attempted theft.
- Unauthorized possession or removal, attempted possession or removal, or purposeful misplacement of any City property or property of employees, customers, or the general public.
- Violations of the City's policies against discrimination, harassment, bullying, or retaliation.

- Creating or contributing to workplace harassment of other employees.
- Abuse or unauthorized use of any City computer system, information technology, or electronic communication tools.
- Unauthorized access or possession of confidential information.
- Unauthorized possession or use of City records or property.
- Violations of the City's workplace violence policy.
- Violation of the City's smoking policy.
- Violations of the City's social media policy.
- Violation of the City's Information Technology policies.
- Violating confidentiality expectations.
- Unauthorized disclosure or inappropriate use of City confidential information, including but not limited to business, customer, employee, or City resident personal information.
- Fraudulent use or misuse of bereavement, disability, FMLA or other benefits.
- Filing a fraudulent Workers' Compensation claim.
- Unauthorized possession of a weapon, explosives, firearms, or harmful objects, while on City property.
- Gambling or conducting games of chance on City time or on City property, including athletic event pools.
- Use, sale, transfer or possession of narcotics or illicit drugs, while on duty.
- Intentional or negligent violation of any safety rule that is designed to protect City property, residents, employees, or the community.
- Dishonesty or providing untruthful information.
- Refusal to comply with a request for drug screening or alcohol testing where reasonable suspicion exists or where required by state or federal laws.
- Refusal to contact EAP in a timely manner following a mandatory referral, or failure to remain in compliance with the treatment as directed.

- Deliberately creating a hazardous work situation.

- Working overtime or additional hours outside of the normal schedule for non-exempt employees without first having the overtime or additional hours authorized and pre-approved by the Department Director or their designee.

- Failure of supervisory employees to adhere to or implement City policies (e.g., FMLA, restricted/light duty requirements, discrimination, and harassment policies, etc.).

- Engaging in conduct, on duty or off, which reason, morals, or common sense indicate to be wrong and not in the best interest of the City, its residents, or employees, or that is or could be detrimental to the City or the City's relationship with its customers, residents, or employees.

- Boisterous or disruptive activity in the workplace.

- Using City property, equipment, or resources for personal business, gain, or unauthorized outside employment.

- Misuse of work-from-home privileges or failure to adhere to Telework Program guidelines.

- Mishandling, misappropriation, or unauthorized use of City funds, payments, or reimbursements.

- Retaliating against an employee or other individual for reporting misconduct, participating in investigations, or exercising legally protected rights.

- Revocation, suspension, or lapse of an employee's license, certification, or credential which is a requirement of their position.

- Violations of other rules and policies not specified.

PROBLEM-SOLVING PROCEDURE (GRIEVANCES)

Most employees have had a question or problem concerning their job at one time or another. If there is something about your job that is bothering you, let's get it out in the open and discuss it. We cannot answer your question or solve your problem unless you tell us about it.

The "Problem-Solving Procedure" offers employees the freedom to discuss anything they wish with the appropriate officials. These discussions might include but are not limited to discipline, termination, transfer, suspension, promotion, demotion or any other terms and conditions of employment. Follow the procedure below if you believe that a City policy may have been violated or if you have a concern about an employment process or decision. Whenever you have a problem, it usually can be resolved by following these steps:

1. First, discuss any concern with your immediate supervisor. Very often, your supervisor is in the best position to handle your problem satisfactorily. This informal process often will resolve the issue.

2. If you are not satisfied after you speak with your supervisor, or if you feel that you cannot speak to your supervisor, contact your Department Director. Ideally, you should contact your Department Director in writing within ten (10) business days of the event or your supervisor's response. The Department Director will respond to you as soon as is reasonable under the circumstances.

3. If you still are not satisfied after working with your Department Director, or if you feel you cannot work with your Department Director on a resolution, you should submit a written statement to the Director of HR. If the statement is appealing the decision of your Department Director, it must be submitted within ten (10) business days of the issuance of your Director's decision. The Director of HR or designee will issue a response as soon as is reasonable under the circumstances.

4. For termination events only, if you still are not satisfied after working with the Director of HR, you may, within ten (10) business days of the issuance of the Director of HR's decision, submit a written statement to the City Administrator. The City Administrator or designee will respond to you as soon as is reasonable under the circumstances. The City Administrator's decision is final.

At any step in the process, City officials will investigate the circumstances to be able to make an informed decision.

NOTE: Due to the serious nature of harassment, discrimination, and retaliation, you must voice your concerns or complaints about such behavior to the individuals listed above in the Non-Discrimination & Anti-Harassment Policy in this Handbook.

EMPLOYMENT

BASIC WORK RULES

The City's most important rule is to use "good sense" at all times, and while there are policies and rules governing the conduct and performance of employees, basic work rules were also established in order to provide clear expectations.

Attendance, Absenteeism or Tardiness: The efficient operation and success of the City and its departments, is largely dependent upon an employee's consistent and regular attendance. Every employee plays an important role in our operation, absence or tardiness places an unnecessary burden on fellow employees. Employees are expected to report promptly at the designated starting

time ready to begin your assigned duties. Excessive absenteeism or tardiness will not be tolerated. For more information see *"Work Schedule – Attendance, Absenteeism & Tardiness"*.

Breach of Confidence or Security: Confidentiality is extremely important in order to maintain the public and community's trust. Because of the nature of City business, you may be exposed to or have access to information that may be considered of a private and/or confidential in nature and which would not commonly be available to the general public. Such information includes, but is not limited to, social security numbers, credit card account information, customer account and/or financial information, protected medical information, and information protected under "attorney/client privilege" or orders of the court.

Do not allow confidential information to remain in plain view or discuss issues with anyone who does not have a need to know. All City employees have a responsibility to safeguard the confidentiality of individual residents and fellow employees. Employees should be aware of what is discussed openly, where it is discussed and with whom it is discussed. The City will not tolerate the unauthorized release or disclosure of such information.

No employee shall release confidential or sensitive work-related information to the public or to co-workers at any time, by any means, whether electronically or otherwise, for any reason, unless the employee has been specifically authorized to release the information. Similarly, employees shall direct all media inquiries to the Assistant City Administrator, Department Directors or their designee. Employees are not authorized to comment to the media or public on behalf of the City or disclose internal matters that involve the operations and management of the City and its departments that are not of public importance or concern, except as authorized by the City Administrator or Department Director.

Conflict of Interest: You must not engage in activities that are or create a conflict of interest or the appearance of such a conflict. We prohibit employees from transacting any business that competes with the City. If you think that you may have such a conflict, you must notify HR immediately. Conflicts of interest may include:

- Certain outside employment.
- Financial interests with a customer, vendor, supplier, or competitor.
- Serving on boards, committees, or advisory groups for organizations that have dealings with the City, unless disclosed and approved by City Administrator or designee.
- Exploiting your position, inside knowledge or City access for personal gain.
- Proprietary City information; and
- Information about employees, citizens, vendors, or business partners.

Damage to Property: The City has made a tremendous investment in our facilities, equipment, and other property. Deliberate, reckless, or careless damage to the City's property or our citizens' property will not be tolerated. If applicable, damage to property will also be reported to law enforcement agencies.

Fighting, Threats, or Weapons: The City prohibits fighting, threatening words or conduct or any other actions that could injure a citizen, fellow employee, or member of the public, regardless of where such words or actions occur. We also do not allow the possession of weapons of any kind in City vehicles, in City facilities, or on your person at any time while you are working. For more information, see *"Workplace Violence & Security"*.

Fraud, Dishonesty or False Statements: No employee or employment applicant may falsify or make any misrepresentations on or about any documents, employment applications, resume, document establishing identity or work status, medical record, insurance form, procurement, timesheet, timecard, expense report, or any other document. If you observe or are aware of such a violation, you must report it to your supervisor or HR immediately.

Gambling: You may not engage in any form of gambling on City premises, City time or using City systems or resources.

Gifts or Gratuities: See Ethics & Conduct: Gifts and favors.

Harassment: The City's *Non-Discriminatory and Anti-Harassment Policy*, which we have set forth in detail in this Handbook, strictly prohibits harassment based on race, color, religious affiliation, national origin, sex, sexual orientation, pregnancy, childbirth, or related medical conditions, marital status, age, disability, citizenship, genetic information, or any other legally protected status.

Injuries and Accidents: Every injury, no matter how minor, must be immediately reported to your supervisor for first aid treatment or medical care. If you have a job-related injury/accident, you must see a City authorized doctor listed on our Workers' Compensation panel information. The City may require that you present a doctor's release before returning to work.

Insubordination: Employees have duties to perform and everyone, including your supervisor, must follow directions from someone. Employees must not refuse to follow the lawful directions of a supervisor or member of management. If you have any concerns about following the instruction of your supervisor, you should raise that concern with another member of management.

Misuse of Property: Employees may not misuse or use without authorization any equipment, vehicle, resource, or other property of citizens, other employees, or the City.

Poor Performance: We expect employees to make every effort to learn their job and to perform at a satisfactory level. Employees who fail to maintain a satisfactory level of performance are subject to discipline, up to and including immediate termination.

Shortages: Any employee who handles cash (or parts, materials, or other assets) as a part of his or her job duties, will be held accountable and may be required to pay for the shortage. Further, you may be disciplined for the shortage or failure to protect City assets, up to and including immediate termination.

Sleeping or Inattention: To protect the safety of all employees and to properly serve our citizens, everyone needs to be fully alert while on the job. Sleeping or inattention on the job will not be tolerated.

Solicitation or Distribution: In the interest of maintaining productivity and a proper business environment, you may not distribute literature or other materials during the working time of any employee involved. You may not distribute literature or other material in working areas, at any time, whether or not you are on working time. For just some examples, non-working time would be lunch or break, and a non-working area would be a break room. For more information, see *"No Solicitation – No Distribution – Bulletin Boards"*.

Substance Abuse: The City does not tolerate substance abuse. **Employees who test positive for the presence of drugs or alcohol are subject to discipline, up to and including immediate termination.** For more information, see *"Protecting People & Property: Drug and Alcohol Usage"*.

Theft: Society has laws against theft and so do we. Stealing or attempting to steal City property or property belonging to others is strictly prohibited. To protect you, your co-workers, and the City, we reserve the right to inspect all handbags, briefcases, packages, lockers, toolboxes, desks, cabinets, vehicles, and any other containers or items on or in City property. If you wish to remove any City property for personal use, you must obtain written permission in advance from your Department Director.

Unlawful Activity: Employees should not engage in any unlawful or unethical activity, including, but not limited to activity either on City property, a job site, or off the job, since such activity can adversely affect the City's reputation.

Unsafe Work Practices: The City is committed to providing a safe place for you to work, and we have established a safety program to ensure that everyone understands the importance of safety. This program requires all of us to exercise good judgment and common sense in our day-to-day work. Horseplay and practical jokes can cause accidents and injuries and, therefore, are prohibited.

Workplace Conduct & Respect of Others: The City is committed to maintaining a professional, respectful, and inclusive work environment. All employees are expected to treat supervisors, co-workers, citizens, and visitors with courtesy, dignity, and respect at all times. Disrespectful, disruptive, or inappropriate behavior, including verbal abuse, derogatory comments, dismissive remarks, sarcasm, insubordination, intimidation, retaliation, or unprofessional conduct in communication, meetings, or work interactions, is prohibited. Employees must work cooperatively and maintain a professional demeanor, fostering an environment where teamwork and mutual

respect are the standard. For more information see *"Anti-Bullying and Non-Discrimination & Anti-Harassment".*

Obviously, this list is not all inclusive and there may be other circumstances for which employees may be disciplined or terminated. If you have any questions about these rules, or what we expect of all employees, please discuss them with your supervisor or HR.

COMPLIANCE WITH APPLICABLE LAWS

The City complies with all applicable state and federal laws, including but not limited to those relating to medical, family or military leave, equal employment opportunity, environmental regulations and laws, safety, health, and laws regarding any other terms and conditions of employment. Similarly, the City expects all employees to comply with all laws that apply to their jobs as a condition of their continued employment.

EMPLOYMENT STATUS & DEFINITIONS

According to state law, all City employees are employed "at-will," which means employees can be terminated at any time, with or without cause and with or without advance notice. This "at-will" relationship can be changed only in a written document signed by the City Administrator, approved by the City Council, signed by the City Attorney indicating approval as to form and signed by the Mayor.

Official: An individual who is elected by the citizens of the City of Alpharetta to include the Mayor, City Council members and the Judge; or is appointed by the Mayor and Council to include the City Clerk and Chief Clerk of Court.

Department Director: An individual who is assigned formal management responsibilities for an established department of City government.

Temporary Employees: An employee who is scheduled to work no more than 28 hours per week on average on a temporary basis (limited in duration) or on special projects. Temporary employees are employed for a specific function, part-time or full-time and for a temporary or limited period of time, 12 months or less. Temporary employees are not eligible for City benefits, except those required by law.

Seasonal Employees: An employee who is scheduled to work any number of hours per week on a temporary basis during seasonal periods (limited in duration) or on special projects. Seasonal employees are employed for a specific function, part-time or full-time and for a temporary or limited period of time, six months or less. Seasonal employees must reapply for employment and follow the regular employment application procedures and are subject to reemployment at the sole discretion of the City. Temporary employees are not eligible for City benefits, except those required by law.

Supervisor: Applies in general terms to any employee formally assigned to supervisory responsibilities for personnel and operations of a unit. Department Directors and the City Administrator should be understood to be "supervisors" of individuals who report directly to them.

Employee Status:

- *Regular full-time employees* ("full-time or FT employee"): employees scheduled to work thirty-seven (37) hours or more per workweek.

- *Regular part-time employees* ("part-time or PT employee): employees scheduled to work between twenty (20) and twenty-nine (29) hours each workweek on a consistent basis.

- *Exempt employees*: those who have met the criteria established by the Fair Labor Standards Act (FLSA) and Minimum Wage Act and are not eligible for overtime compensation. Exempt employees receive a weekly salary that covers all work performed in the week, including work in excess of their regular schedules.

- *Non-Exempt employees*: those employees to whom the City is required to pay overtime compensation in accordance with the FLSA. All non-exempt employees will be compensated at time-and-one-half for any hours actually worked in excess of 40 hours in a work week except for Police and Fire Department shift employees who have other limits under the FLSA. Paid benefit time shall not count as hours worked.

  Department Directors have the authority to schedule employees for overtime as the workload of the department requires. The refusal of an employee to work overtime, without proof of personal hardship, is grounds for disciplinary action, up to and including termination. All overtime must be approved by the Department Director and any unauthorized overtime can be grounds for disciplinary action, up to and including termination. Overtime will be distributed as equally as practical and reasonable among qualified employees.

Others (non-employees): Interns, volunteers, independent contractors, and the staff of temporary staffing agencies are not City employees and are not eligible for benefits.

Eligibility: Full-time employees are eligible for benefits summarized in this Handbook, subject to certain requirements and eligibility criteria, which may be described in individual benefit documents or other policies. All other employees, including temporary and part-time, may not be eligible for certain benefits.

If you have questions concerning your employment status or the benefits for which you qualify, please ask your supervisor, contact HR, or Finance Department - Benefits Division.

EQUAL EMPLOYMENT OPPORTUNITY (EEO)

The City is an Equal Employment Opportunity employer committed to providing equal opportunity in all of its employment practices, including selection, hiring, assignment, re-assignment, promotion, transfer, compensation, administration of benefits, and all other conditions of employment. The City prohibits discrimination, harassment, and retaliation in employment based on race, color, religious affiliation, national origin, sex, sexual orientation, pregnancy, childbirth, or related medical conditions, marital status, age, disability, citizenship, ancestry, military status, genetic information, background, or any other legally protected status to be pertinent to conditions of employment and will not be a consideration in the City's selection process. Violation of this policy will result in disciplinary action, up to and including immediate termination.

EXIT INTERVIEW

Any employee leaving the City may be required to attend an exit interview conducted by Human Resources. The purpose of the interview is to determine the reasons for leaving and to resolve any questions of compensation, insurance continuation, return of City property, or other related matters.

HIRING & SELECTION

HR posts all vacancies on the City's website. Candidates, including current employees, who wish to be considered for an open position must apply and submit all required documentation. Qualified candidates will be considered for vacancies based on their work experience, training, formal education and, if applicable, work performance at the City. In some instances, current employees may be offered a position without the required degree, certification, or licensure, provided they obtain the required credentials in an appropriate period of time to be determined by the Director of HR and Department Director, with final approval from the City Administrator.

Candidates may be required to complete a background check, polygraph, drug screen, medical examination, psychological examination, and other job-related tests, as required by the HR Department, in order to assess their skills or qualifications for certain positions as part of the selection process.

The City reserves the right to recruit externally and internally simultaneously, as well as to hire the most qualified candidate, whether that individual is an internal or external candidate.

The City does not hire employees younger than 18 years of age, except for temporary seasonal positions (at least 16 years of age).

Rehire of Former Employees

Former employees who left the City in good standing and are eligible for rehire may be considered for employment. To be considered for an open position, former employees must apply and submit all required documentation. Qualified former employees will be considered along with all other qualified candidates and will be required to participate in all phases of the recruitment process in

the same manner as all other applicants. Rehired employees begin benefits just as any other new employee. Previous service with the City will not be considered in calculating longevity, leave accruals or any other benefits, except vesting period as defined in the Pension Plan Document.

A former employee who was terminated for violating a policy or who resigned in lieu of termination from employment due to a policy violation shall be ineligible for rehire.

The Director of HR reserves the right to establish policies which specifically govern the hiring of former City employees.

Background Checks

In order to ensure the safety of the public and our employees, the integrity of sensitive information and the overall quality of our workforce, the City may conduct background checks on all internal and external finalist candidates for employment or promotion. Dependent upon the position being sought, the information collected may include legal residency, reference checks, education verification, criminal history, motor vehicle driving history, financial and credit information, and/or any combination thereof determined by the City to be necessary, appropriate, and relevant to the position being sought.

The process for background checks will comply with all federal, state, and local laws and statutes and will be performed only after a candidate has provided written authorization. Candidates who refuse to provide such authorization will not be considered for employment or promotion.

Hiring managers should consult with HR for additional information on the application of this policy and for more details about the hiring and background check process.

Hiring of Relatives

Familial and other personal relationships between City employees and/or, between employees and elected or appointed officials, may result in perceived or actual conflicts of interest, favoritism, and may negatively impact the operations, morale, trust, and image of the City. It is the City's policy to prevent certain employment situations which can adversely affect the City operations.
For the purposes of this policy, the following terms and definitions apply:

Relative: Spouse (including ex-spouse), civil union partner, children, parents, siblings, stepparent, stepchildren, grandparents, grandchildren, aunt, uncle, nephew, niece and in-laws (father, mother, son, and daughter).

Employment: Refers to employees, independent contractor status, and includes full-time, part-time, temporary, or any other basis of employment or engagement whether compensated or uncompensated.

This policy applies to all current employees and candidates for employment.

1. No relative by blood or by marriage to any elected official of the City of Alpharetta may be employed by the City.
2. No relative by blood or by marriage to the City Administrator, Assistant City Administrator, City Clerk, City Solicitor, and any Department Director may be employed by the City.
3. The City will hire and/or promote, relatives of persons currently employed only if all the following applies:
    A. Familial relationship does not interfere with terms or conditions of employment of either party.
    B. Candidates will not occupy a position in the same line of authority (supervisory) in which employees can initiate or participate in decisions involving a direct benefit to the relative. Such decisions include hiring, retention, transfer, promotion, wages and leave requests.
4. If the familial or dating relationship of two employees changes, during the course of their employment with the City, in a manner contradictory to any provision of this policy then only one of the employees will be permitted to maintain employment with the City.
    A. The decision as to which employee will remain in her/his position must be made by the two employees within 30 calendar days of the date of the change in relationship status.
    B. One employee may apply to transfer to another position with the City that meets the provisions of this policy if such position is available at the time.
        a) It is not incumbent upon the City to create a position or take any action to accommodate the policy constraints.
        b) The salary of the employee who is allowed to transfer may be affected by the transfer and will be determined based on the merit of the acquired position, not prior years of service with the City.
        c) The transferred employee may be required to serve an introductory period in the same manner as a newly hired or promoted employee.
    C. If one of the employees has not received a qualifying transfer or has not terminated her/his employment by the end of the 30-day calendar period, the City reserves the right to terminate the employment of either or both employees.
    D. Employees must notify HR, within 30 calendar days of the date of the change in relationship status, of any change in familial or dating relationship that creates a conflict with any provision of this policy. Failure to provide timely notification may result in disciplinary action up to and including termination of employment.
5. The City reserves the right to apply this policy to situations where there is a conflict, or the potential for conflict, because of the relationship between employees, even if no direct reporting relationship or authority is involved. In these situations, the City will reassign one of the employees within 60 days.

6. Any exception to this policy must be approved by the Director of HR and City Administrator. Department Director must provide HR with written justification for the exception prior to any employment decisions.

Paid Time Off (PTO) Upon Hire

Regular full-time and part-time employees will receive an initial deposit of PTO upon hire equivalent to approximately two (2) weeks, as outlined below:

- Full-time employees (37 hours/week): 74 hours
- Full-time employees (40 hours/week): 80 hours
- Part-time employees (scheduled to work 20 hours or more per week): 40 hours
- Fire sworn personnel: 106 hours

A re-hired former employee who previously received this initial PTO deposit, including one provided as part of a sign-on incentive program, is not eligible to receive an additional PTO deposit upon rehire.

Newly hired employees may begin using PTO after completing three (3) months of continuous employment, unless otherwise approved in advance by the Director of Human Resources due to extenuating circumstances.

PTO provided as part of the initial deposit is not eligible for payout upon separation of employment unless the employee has successfully completed their Introductory Period.

Implementation Provision for Current Employees: During the first year of implementation of this policy, eligible employees hired prior to the effective date who did not receive an initial PTO deposit, as part of a sign-on bonus incentive, will be granted five (5) Floating Holidays. In the second year of implementation, those employees will be granted an additional five (5) Floating Holidays.

These Floating Holidays are subject to the same rules and conditions as the Employee Floating Holidays provided annually. Refer to the *Holiday Pay* section for additional information.

INTRODUCTORY PERIOD

For every new employee or current employees taking on a new position within the City (transfers, promotions, etc.), the introductory period is a work analysis period for both you and the City. During this time, you are able to learn about the City, your job, and your new surroundings. At the same time, your supervisor will assist you in learning your job and will evaluate your progress. The introductory period is the first 12 months of continuous, on-the-job employment. Police and Fire

Department ~~Public Safety~~ employees may be subject to a longer introductory period based on mandated training regulations.

During the introductory period, the City will review your job performance, work behavior, and overall interest in your job, among other factors, and make a decision concerning your continued employment. After you complete your introductory period, the City will continue to periodically review your overall job performance. Completion of the introductory period does not change your at-will employment status. During the introductory period, as well as at all times after, employment may be terminated at any time, without cause and for any reason.

The introductory period may be extended up to an additional 6 months at the discretion of the Department Director, and with approval from the Director of HR. Extension of the introductory period may be necessary to fully evaluate the employee's ability to successfully perform the responsibilities of the position or correct a performance deficiency.

Employees accepting any appointment with the City must remain in the new position for the equivalent of the position's normal introductory period before applying for a promotion, demotion, or transfer to another position. This provision may be waived if it is determined by the consenting Department Director that it is in the best interest of the City, and if final approval is obtained from the Director of HR.

JOB RESPONSIBILITIES

We expect and require all employees to do a variety of tasks from day to day. Where possible, we attempt to cross-train all employees so they can learn to perform other tasks. This practice allows us to achieve maximum efficiency, as well as providing employees with opportunity to expand their work knowledge.

Whenever business needs require us to assign employees to a new task, either temporarily or permanently, we will provide additional training, if necessary.

From time to time, we may publish lists of tasks to be performed by employees as part of their jobs. These lists are only guidelines intended to provide clarity and to facilitate communications with employees and they should not be viewed as an exhaustive listing of a particular employee's job requirements.

All employees are responsible for compliance with federal, state, or local laws that apply to and regulate their job duties.

NO DATING

Romantic or sexual liaisons that develop among employees or between employees and elected officials in the workplace may be potentially disruptive to our business. The City will intervene and discuss the romantic or sexual liaisons with involved employees and/or elected officials. The City

may also take remedial measures, up to and including transfer or immediate termination, when the City decides that such action is in the City's best interests.

You are expressly prohibited from dating or becoming similarly involved with (for example a romantic or sexual relationship) anyone employed within or doing business with the department within which you are employed. Further, no employee may engage in such relationship with any contractor, vendor, or other person or persons doing business with the City if such relationship is deemed by the City to pose or present in any manner a conflict of interest or potential liability.

Managers, supervisors and elected officials are expressly prohibited from dating or becoming similarly involved with (for example a romantic or sexual relationship) any employee within their sphere of responsibility, or any employee of an entity funded in whole or in part by the City if the manager, supervisor or elected official serves on the board of the entity.

In the event the City becomes aware of such a relationship, the employee involved will be subject to immediate termination and the elected official will be subject to sanction subject to the City's code.

NOTICE OF RESIGNATION, RETIREMENT & SEPARATION OF EMPLOYMENT

It is City policy to ensure that employment separations are handled in a professional manner with minimal disruption to ongoing work functions. Employees are required to provide a minimum of 2 weeks' written notice to facilitate a smooth transition out of the organization and to leave in good standing. Employees seeking retirement from the City are required to provide a minimum of 30 days' notice to leave in good standing. Employees will not be allowed to rescind a resignation or change the resignation date once the resignation has been confirmed and accepted by the City. The Director of HR may permit an employee to change the date of resignation or withdraw a notice based on substantially changed circumstances arising after the employee submitted their notice to retire or resign, and in the best interest of the City.

Moreover, the Director of HR may reduce the notice period as specified above if in the best interest of the City.

At the minimum, employees must notify in writing their immediate supervisor and the HR Department of their intent to terminate the employment relationship. HR will coordinate exit interview and to facilitate the offboarding process. HR will notify all necessary City departments of the separation.

Employees must be present at work on their last day and PTO balances, holidays, or any other time-off benefit shall not be used to extend the date of separation beyond the last day scheduled to work or instead of notice.

The separating employee must return all City property at the time of separation to their immediate supervisor, including but not limited to uniforms, cell phones, keys, technology resources and

identification cards. The separating employee is also subject to any department policies/procedures that may be in place for forfeiting and/or reimbursing equipment, training expenses, etc. Failure to return some items may result in deductions from final paycheck or other legal action to enforce the City's rights.

Departing employees must confirm their forwarding address to ensure that benefits and tax information are received in a timely manner.

OUTSIDE EMPLOYMENT

The City recognizes that, on occasion, employees may seek a second job outside their employment with the City.

Employees are expected to devote the time and effort necessary to fulfill their job responsibilities to the City. Outside employment that interferes with an employee's ability to perform their City duties is not permitted, except as required by law or for employees serving in the military.

An employee may not undertake any proposed outside employment that:

- Appears to create a conflict-of-interest situation or is contrary to the interests of the City.
- Requires the use of City facilities, equipment, or material (some exceptions apply for employees in Police and Fire Department~~Public Safety~~, please review departmental policies for specific rules).
- Causes doubt as to the observance of ethical standards of professional ethics.
- Obligates the employee to be available to the outside employer during his or her normal working hours with the City.
- Requires or makes the use of the City name, logos, seals, emblems, trademarks, copyrights, or a department name for advertisement purposes or otherwise, in connection, with such outside employment.
- Has a potential or actual negative impact on the City, including, but not limited to its image or mission.
- Additionally, City Employees may not solicit or perform work or services for a second outside job while working time for the City.

Employees are cautioned to consider carefully the demands additional work activity will create before requesting approval to seek or accept outside employment. Outside employment will not be considered an excuse for poor job performance, absenteeism, tardiness, leaving early, refusal to travel, or refusal to work emergency callbacks, overtime, or different hours.

Employees who are on a leave of absence, generally must be on leave from any other employment (paid, unpaid or self-employed) as well unless the nature of the City leave, or employee restrictions, is unrelated or does not affect requirements of the outside employment.

If outside work activity does cause or contribute to job-related deficiencies, the employee will be asked to discontinue outside employment. The employee may also be subject to normal discipline procedures for dealing with infractions of City and department work rules and policies.

PERSONAL APPEARANCE & ATTIRE

The City delivers services to the public in a professional and dignified manner. Maintaining a professional atmosphere begins with the image our employees present to co-workers and the public. Employees are expected to maintain a neat, well-groomed appearance and a courteous demeanor, which contributes to positive impressions and public confidence in City services.

This policy applies to all employees during working hours and at any time they are representing the City, including public meetings and City functions. Uniformed employees must meet standards set by their supervisor, Department Director, or designee.

Reasonable accommodations will be made for employees' religious beliefs or disabilities, consistent with the City's obligation to maintain a professional appearance.

~~The City delivers services to the public in a dignified and professional manner. Our professional atmosphere is maintained, in part, by the image we present to our co-workers and the public. To project a professional image, we expect all employees to present a neat, well-groomed appearance and a courteous disposition. These qualities go further than any other factor in making a favorable impression on the public and your co-workers.~~

~~This policy outlines the expectations regarding an employee's appearance and dress during working hours or at any time one is acting as a representative of the City, such as public meetings and City functions outside the workplace. Uniformed City employees are required to meet standards of dress as required by their supervisor, Department Director, or their designee.~~

~~Reasonable accommodation will be made for employees' religious beliefs and disabilities whenever possible, consistent with the City's necessity to present a professional appearance to the public.~~

Inappropriate Attire: Employees must dress in a businesslike manner and avoid extremes in dress. Clothing that is flashy, skimpy, or revealing clothing is unacceptable.

Inappropriate attire includes any clothing exposing the body in a manner inappropriate for a business environment, clothing that is torn, ripped or dirty in appearance, faded, worn, or frayed denim jeans. Clothing with any controversial advertising, slogans, cartoon figures, pictures, or commentary. Sweatshirts, sweatpants, all styles of shorts, any color denim attire (other than jeans on Friday), parachute pants, pajama/sleep pants, leggings (if not worn under a tunic blouse or

dress), overalls, stirrup pants, spandex or other form-fitting pants. T-Shirts, athletic apparel, flip-flops, Crocs type footwear, slippers, beach shoes, athletic sandals, excessive high heels, gym shoes/sneakers. Tie-dye, tank tops, backless tops, or spaghetti strap tops, unless worn with an overshirt or jacket, midriff tops, halter tops, tube tops, low-cut revealing shirts or tops, sheer, see-through or mesh clothing. Excessively short skirts/dresses (more than 2 inches above the knee), skorts or exposed undergarments. Hats are only accepted if required for sun protection.

Clothing must fit properly. No article of clothing can be too tight or too baggy. No clothing should have holes or be see-through. Clothing worn to work must not expose your cleavage, back, midriff, stomach, backside, or undergarments at any time, including when bending over, lifting above your head, or any other movement. All clothing must be properly laundered and pressed. The City, in its sole discretion, will determine when clothing does not meet a requirement of the *Personal Appearance & Attire Policy*.

Employees provided with City uniforms should keep them in neat and clean condition and must wear them at all times when on duty.

Good personal hygiene and grooming is also important in terms of the public's favorable opinion and in terms of your respect for your co-workers. Accordingly, you are expected to come to work in a clean condition.

Perfumes or cologne should be used sparingly. Facial hair should be well groomed and may not interfere with the use of personal protective equipment. Hair should be neat and tidy, and makeup, if worn, should be understated and professional.

We also want to meet the public's expectations in terms of the City's image and style. Thus, for our employees who have contact with the public, we limit the types of tattoos, ear gauges and body piercings that may be visible.

No employee may have a visible tattoo that might be offensive to the public or is a violation of our *Non-Discriminatory and Anti-Harassment Policy*. Any employee who might have such a tattoo must keep it covered while at work or while representing the City. Similarly, visible piercings should not be excessive in number or placement. Similarly, visible piercings should not be excessive in number or placement. As with articles of clothing, the City will determine whether particular tattoos or piercings (including earrings) should not be visible. Please know that if tattoos, ear gauges, or body piercings are not in keeping with the image that the City chooses to present to its citizens, you may be required to cover the tattoo and cover/remove the ear gauge or piercing. In all cases, an employee's appearance shall not interfere with the ability to safely and effectively perform the requirements of the job.

Business Attire: is the recommended year-round dress during normal business hours and should be worn when scheduled meetings with the public, business associates or other professionals merit the need. Appropriate "Business" Attire: blazers, suits, or sports coats; tailored dress pants; dresses, skirts; blouses; ties; dress shirts; dress shoes; and socks.

While "Business" attire is the preferred dress, **Business Casual** attire may be worn at your discretion providing the attire meets the standards ~~elements~~ of this policy and you do not anticipate meeting with the public in a professional setting or capacity. Appropriate Business Casual Attire includes slacks (e.g. Dockers); pants; blouses; sweaters/cardigans; collared shirts; and skirts.

You are expected to always observe the Personal Appearance Policy while at work. Employees who report to work in unacceptable attire or appearance may be requested to leave work and return in acceptable attire or appearance. Such time away from work will be without pay for non-exempt employees. Violation of this policy may result in discipline, up to and including immediate termination.

The City Administrator, Department Director, or their designee may prohibit or allow any attire due to special circumstances or activities that may be occurring on that given day.

Department Directors are responsible for ensuring employees in their respective departments project a professional image and adhere to our Personal Appearance Policy. Each Department Director will make, within the boundaries established above, the determination as to what is appropriate in their department based on the amount of contact with the public and safety considerations.

These guidelines are not intended to be all-inclusive, but rather should help set the general parameters for appropriate attire. Employees should use good judgment and common sense about items not specifically addressed. In all cases, employees should be well-groomed and professional, with attire that is clean and in good taste. Questions about acceptable work attire should be directed to immediate supervisor or Department Director.

PERFORMANCE MANAGEMENT

Performance Management involves ongoing communication between the employee and their supervisor in support of accomplishing the mission and goals of the City while exemplifying our core values. The performance management process includes setting objectives, identifying goals, providing feedback, evaluating results, and performance coaching and development. Supervisors are required to oversee employee performance and provide feedback throughout the year to recognize successes and address concerns in a timely fashion.

Performance Review

Performance reviews provide feedback on accomplishments and continuous improvement efforts. They promote common understanding of an employee's needs, work objectives, accomplishments, standards of performance expectations, and provide supervisors with a framework to aid in coaching and development. The formal performance review is an opportunity for the employee and their supervisor to determine whether previously discussed performance expectations and goals have been met, to discuss professional development opportunities, and to identify options for acquiring additional skills and knowledge to further the employee's career growth.

Formal performance reviews will be conducted annually. The review period will be January through December of each year. Newly appointed and promoted employees will receive a performance review 6 months from their appointment or promotion date, prior to completing their introductory period. All performance reviews are completed, routed, signed, and placed in the employee's personnel file. A signature on the completed performance review means that the employee had an opportunity to discuss the document with their supervisor and does not signify agreement with the supervisor's assessment.

Completed performance reviews are forwarded to the Department Director, or designee, for final review and then submitted to HR, to ensure ratings are justified through specific work examples and that a consistent standard of measuring performance is utilized, ensuring consistent evaluations across the City.

Performance reviews are not subject to appeal. If an employee is in disagreement with the performance review, they are encouraged to discuss their concern with their supervisor. Employees may also express their disagreement or concern with the content of their performance review by adding written comments to the document.

Employees who perform below expectations may be terminated or placed on a Performance Improvement Plan.

VERIFICATION OF EMPLOYMENT ELIGIBILITY

The Federal Immigration Reform and Control Act of 1986 requires employers to verify the legal working status of all employees hired on or after November 7, 1986. The Act makes it unlawful to hire anyone who is (1) not a U.S. citizen, or (2) an alien who does not have the legal right to be employed in the United States. All employees will be required to complete Form I-9 and provide current documentation from time to time, as required by federal law. The City uses E-Verify to check employment eligibility for all employees, where applicable, as required by law. (Appendix B - E-Verify Poster).

PROTECTING PEOPLE & PROPERTY

ANTI-BULLYING

To preserve a healthy, positive, and productive work environment, the City will not tolerate verbally or physically abusive conduct by anyone who harasses, disrupts, or interferes with another person's work performance or which creates an intimidating, offensive or hostile working environment.

In addition to personal harm, bullying in the workplace interferes with another person's work performance; therefore, it is not tolerated. Bullying refers to actions or conduct, whether verbal or physical, toward or about an individual that has the purpose or effect of substantially interfering with an employee's work or work environment and that adversely affects an employee's ability to

contribute to work or the work environment by placing the employee in reasonable fear of physical harm and/or by causing emotional distress. Bullying may occur verbally, physically, in writing (including emails, text messages and online postings) or non-verbally/non-physically (i.e. hand gestures). Bullying may also involve an abuse of power across different classifications of employees.

Bullying includes an individual's repeated, intentional and/or targeted actions directed toward an employee (or a group of employees) that have the purpose or effect of abusing, intimidating, demeaning, degrading, threatening, coercing, and/or humiliating the employee(s). Workplace bullying is often characterized through purposeful use of insulting, hurtful, hostile, vindictive, cruel or malicious behaviors that undermine, disrupt or negatively impact an employee's ability to do his or her job.

Some examples of bullying include, but are not limited to:

- Persistent or arbitrary criticism. Publicizing humiliating or false information about an employee's work or reputation.
- Gossip, rumors, and innuendo.
- Deliberately intruding on a person's privacy.
- Tampering with a person's personal belongings or work equipment.
- Undermining authority, such as encouraging other employees to disregard an employee's directives or management.
- Excessive teasing. Pranks, tricks, or practical jokes that have the intent or effect of humiliating or embarrassing a person.
- Yelling or use of profanity or demeaning language, verbal abuse, threats, and intimidation.
- Withholding necessary information or purposefully giving the wrong information.
- Setting another employee up to fail. Deliberately undermining or sabotaging another employee's work.
- Staring, glaring or nonverbal intimidation and displays of hostility, such as standing too close or making aggressive gestures.
- Systemic isolation, exclusion, ignoring or ostracizing of an individual from work, work interactions and the work environment.
- Public criticism of an employee's decisions or actions in meetings or group settings.

- Deliberate, inappropriate, or cruel jokes targeted toward an employee or made at an employee's expense.

- Mocking an employee's accent, appearance, or personal attributes or making unwelcome comments about an employee's personal life or beliefs.

If an employee experiences or witnesses any conduct they believe is inconsistent with this policy, the City expects the employee to immediately report the conduct to their immediate supervisor, Department Director or Director of HR. The City will investigate all complaints arising under this policy, and if it is determined that any employee has engaged in inappropriate conduct under this policy, the City will take appropriate disciplinary action, up to and including termination. Retaliation against any person who has complained about bullying or who otherwise participated in an investigation of bullying will not be tolerated. Retaliation will result in severe discipline, up to and including termination.

All employees are expected to stop bullying in the workplace by demonstrating appropriate behavior, consistent with these standards, and avoiding engaging in behavior that is inconsistent with these standards.

DRUG & ALCOHOL USAGE

The use of illegal drugs and the abuse of legal drugs and alcohol by City employees presents unacceptable risks to the safety and well-being of other employees and the public, invites accidents and injuries, and reduces productivity. In addition, such conduct violates the reasonable expectation of the public that the employees who serve and protect them will obey the law and be fit and free from the adverse effects of drugs and alcohol abuse.

The City has been certified as a Drug-Free Workplace. In keeping with the procedural safeguards, limitations and due process guarantees contained in the City's Municipal Code, as a condition of initial and continued employment, the City prohibits employees from reporting to work or performing their duties with any unlawful drugs or alcohol in their systems.

In the interest of having employees who are fully fit and capable of performing their jobs, and for the safety and well-being of employees and residents, the City has established this program that will allow the necessary steps, including drug and/or alcohol testing, to implement the general policy regarding drugs and alcohol. The City requires ongoing compliance as a condition of employment. Failure to comply may result in disciplinary action up to and including termination.

To assist employees to understand and avoid the perils of drug and alcohol abuse, the City is involved in an ongoing educational effort to prevent and eliminate drug and alcohol abuse that may affect the workplace. Through this policy and related efforts, the City will attempt to inform employees about the dangers of alcohol and drug abuse, the City's *Alcohol and Drug Usage Policy*, the availability of treatment and counseling for employees who voluntarily seek such assistance, and the sanctions that the City will impose for violations of this policy.

The City recognizes that substance abuse is a medical problem that may be successfully treated. Early detection and treatment of alcohol or drug abuse is important for successful rehabilitation and for reduced work, personal, and social disruption. The City therefore encourages employees who believe that they have a drug or alcohol problem to seek the assistance of the City's EAP.

Employees are strictly required to comply with this policy and to report any conduct in violation of this policy immediately.

Employees are also prohibited from using, possessing, manufacturing, selling, trading, distributing, or making arrangements or offering to distribute unlawful drugs or alcohol while at work, while performing job duties, off site at training or meetings, on City property (including in personal vehicles onsite), during lunch or breaks, or in City vehicles. Further, the City prohibits all unlawful drug use, possession, or distribution, whether on or off duty. Drugs can stay in one's system and affect work later. The City participates in and meets the requirements of Georgia's drug-free workplace programs (Official Georgia Code Annotated, Title 34, Chapter 9, Article 11).

To enforce this policy, the City may, at any time where lawful, require you as a condition of employment, to submit to a physical examination and/or urine, breath, blood or other type of test to determine the presence of drugs or alcohol in your system. The possible occasions for drug testing include, but are not limited to:

- Pre-employment and re-employment.
- When the City has a reasonable suspicion that you have violated the *Drug and Alcohol Usage Policy*.
- When you suffer an on-the-job reportable injury or are involved in an accident including a motor vehicle accident.
- As part of a routine, fitness for duty examination or return-to-work process.
- As follow-up testing if you have been in an Employee Assistance Program or rehabilitation program; and/or
- As part of any random program of testing which the City may implement for certain employees based on job title and responsibilities.

The City may conduct drug or alcohol testing when the City has reasonable suspicion that you have violated the drug or alcohol policy, including accidents suggesting carelessness, disregard of safety rules or other conduct indicating possible violation of the Drug and Alcohol Policy. Employees and/or applicants who receive a positive confirmed test result may contest or explain the test result within 5 working days after receiving written notification of the positive test result. If you suspect an employee of drug or alcohol use, or any violation of this policy, report it to the Director of HR.

Prohibited Activities

All City employees shall be governed by the principles of an alcohol and drug free workforce and workplace. The workplace includes all buildings, offices, lockers, facilities, grounds, parking lots, places and vehicles owned, leased or managed by the City, and the employee's personal vehicle while engaged in the business of the City, and all areas where City-business is conducted, whether on or off-City premises.

The term "drug" shall include any controlled substance listed in the Georgia Controlled Substances Schedule, for which the person tested does not submit a valid, pre-dated prescription. The term "drug" includes both illegal drugs and prescription and over-the-counter medication, which have not been legally obtained, are not being used for prescribed purposes, are not being taken according to prescribed dosages or are otherwise wrongfully used or sold. In addition, it includes "designer drugs" which may not be listed in the Controlled Substance Act, but which adversely affect perception, judgment, memory, and coordination.

The following actions are strictly prohibited:

- Being impaired by or under the influence of alcohol, illegal drugs or controlled substances, or having any of the same present in their bodily systems, while on duty or on City property.

- Refusing to submit to testing according to the procedures outlined in this policy or failing to cooperate in the testing process, including any refusal to sign any required form consenting to testing and to the release of test results to the City.

- The manufacture, distribution, dispensation, sale, possession or use of alcohol, illegal drugs or controlled substances while on duty ("on duty" includes working hours, on-call time, and rest breaks and meal periods) or on City property (which includes any City-owned or leased vehicle and other equipment).

- Tampering with, adulterating, diluting, or substituting a test specimen or causing another person to tamper with, adulterate, or substitute a test specimen; or
- Unlawful conduct while working. Further, unlawful conduct off duty may result in discipline, up to and including immediate termination of current employees or disqualification of an applicant.

Any violation of the rules set forth in this policy will result in immediate termination of current employees or disqualification of an applicant.

Use of Prescribed or Over-the-Counter Medication

Use of medication administered, prescribed by, or under the supervision of a physician and according to the prescribing physician's lawful directions or non-prescription medication in conformity with the manufacturer's specified dosage is not prohibited by this policy. Employees are prohibited from being under the influence of prescribed medical cannabis or any derivative

thereof during work hours. Further, an employee taking medication must notify their supervisor or the Director of HR, prior to reporting to work, of any known side effects that might affect the employee's job performance or pose a direct threat of harm to themselves or others. In addition, if the employee drives a vehicle or operates equipment in connection with his or her job, the employee must obtain the advice from the physician that the medication will not affect the employee's ability to safely operate a motor vehicle or equipment, or otherwise function in his or her position. If required by the City, the employee shall produce written evidence that any prescription medication has been lawfully prescribed by a physician, as well as information from the physician concerning any potential side effects of the medication. This information will be kept confidential. Failure to report the use of such drugs to a supervisor or HR may result in immediate termination.

Testing

Employees are subject to testing when a supervisor or manager has reasonable suspicion to believe their work behavior and ability are impaired from possibly being under the influence of alcohol, illegal drugs or other dangerous substances. Testing also occurs when there is direct evidence of drug or alcohol use or possession on-the-job. Employees are tested after an injury or accident in a City owned, leased or supported vehicle or operating any other City equipment causing reasonable suspicion of legal or illegal drug use or alcohol abuse, such as where there has been a fatality, the issuance of a citation for a moving traffic violation to any individual involved in the accident, an injury requiring treatment at a medical facility, or the vehicle is disabled or removed from service. Tests will be conducted at a qualified medical facility selected by the City to do drug and alcohol testing.

Failure or refusal of an employee to submit to testing will be treated as a positive test result and will result in immediate termination. Test results will be maintained in the employee's medical file and will be released to the employee if requested in writing. Additionally, failure or refusal of an employee to submit to testing, following a workplace injury, will be treated as a positive test result and will result in immediate termination and the employee may also be disqualified for workers' compensation benefits.

The City will treat information, such as drug test results and use of prescription medication, acquired as a result of this program, as confidential unless otherwise required by law.

Applicants and employees are informed that current drug testing does not distinguish between a positive test result based on illegal use of marijuana and THC use with legal CBD use. As such, any employee who tests positive for THC, for any reason, is subject to immediate termination.

Voluntary Requests for Assistance

An employee may desire to come forward on a self-initiated basis to seek help for an alcohol or drug problem and to voluntarily resolve that problem. Employees are encouraged to do so before they are found in violation of this policy. Voluntary requests for help will be kept confidential in accordance with federal and state law.

The employee will not be subject to disciplinary action for voluntarily coming forward for help. However, an employee will not avoid discipline up to and including termination by seeking such assistance after being requested to take an alcohol and/or drug test or violating City policies. If an employee continues working while seeking assistance from the EAP, the employee must continue to meet all established standards of conduct and job performance set forth by the City. In addition, once an employee has violated City policies, compliance with a prescribed treatment will not guarantee an employee a right of reemployment.

If you want to seek help for drug or alcohol problems prior to being found in violation of the City's *Drug and Alcohol Usage Policy* or being asked to undergo a test, you may seek information from HR. HR can also answer your questions about the application of this policy.

IDENTIFICATION CARD

All employees are issued a photo ID for official duties with the City and must be maintained on your person at all times during work hours. The ID card is the property of the City, must be safeguarded and must be returned immediately at the end of employment. Fraudulent use of a City identification card or allowing another person, including another employee, to use or misuse an identification card for any reason may result in disciplinary action, up to and including termination and/or criminal prosecution. Willful neglect, loss, or refusal to display the ID when necessary will be grounds for disciplinary action.

Employee photo ID badges may be updated on or about the conclusion of each five-year employment period (i.e. an employee's 5, 10, 15, etc. year anniversary). Employees wanting to have their picture updated shall report to HR.

In the event you lose or misplace your City-issued photo ID, you must notify your supervisor and HR on the same day or next business day. HR will issue a new photo ID.

Public Safety employees: ID badges for all employees assigned to Police and Fire~~Public Safety~~ will be issued, updated, or replaced at the ~~Public Safety~~Police Headquarters by an authorized designee.

INSPECTION OF WORK AREA – PRIVACY WAIVER

You are reminded that permission to bring items, such as bags, onto City property is conditioned on agreeing to inspection by the City upon request. Therefore, the City reserves the right to search, without advance notice, desks, lockers, cabinets, toolboxes, computers, vehicles, including personal vehicles brought onto City property, bags or any other property on City premises or in City vehicles. Employees have no right of privacy with respect to City property or items in or on City property. The City may conduct reasonable searches to the extent allowed by applicable law.

If personal belongings are to be searched, the City will make reasonable efforts to notify the employee and allow them to be present. The City will conduct such searches in a manner reasonably intended to address the legitimate operational and management reasons for the search. Searches

will be conducted by the City Police Department in a manner that minimizes any intrusions into your privacy.

The City will explain to you the reasons and grounds for the search and request your consent to the search. No search will be conducted if you refuse to consent to the search, but your refusal to cooperate with search efforts will result in immediate termination.

KEYS

Employees who need keys to a facility, office, locked cabinets or other secured storage or equipment will be issued those keys by a Department Director. Keys must be safeguarded and must be returned immediately at the end of employment.

The City prohibits making duplicate sets of keys or letting someone borrow a key assigned to you for any reason. In the event you lose a key, immediately notify your Department Director. If you are responsible for the loss of a key that results in the lock being re-keyed, you may be asked to pay the cost.

NON-DISCRIMINATION & ANTI-HARASSMENT

It is the City's policy to maintain a work environment free from all forms of harassment and discrimination and to insist that all employees be treated with dignity, respect, and courtesy.

Harassment of applicants, employees, citizens, interns, volunteers or third parties with whom we do business or vendors will not be tolerated. City prohibits harassment of or discrimination against any person based on race, color, religious affiliation, national origin, sex, sexual orientation, gender identity, gender expression, pregnancy and pregnancy-related decisions, childbirth, or related medical conditions, marital status, age, disability, citizenship, ancestry, military status, genetic information, background, or any other legally protected status.

This prohibition against harassment and discrimination covers all employment decisions and actions as well as use of City property, in connection with City programs or activities, or in the administration of any City function. This policy forbids any employee, supervisor, manager, vendor, client, customer, or other person to discriminate against, harass, or retaliate against any employee or applicant of the City. Incidents of harassment or discrimination will result in appropriate disciplinary action up to and including immediate termination.

This policy prohibits harassment or other workplace discrimination based on an employee's or applicant's legally protected status. This includes conduct, whether verbal, physical, or visual, that disparages or shows hostility or aversion toward an individual based upon a legally protected status. The City will not tolerate harassing conduct that has the purpose or effect of interfering unreasonably with an individual's work performance, affecting an individual's tangible job benefits, or creating an intimidating, hostile, or offensive work environment. If you have any questions about

what constitutes harassing behavior or what conduct is prohibited by this policy, discuss the questions with your immediate supervisor.

The conduct forbidden by this policy specifically includes, but is not limited to:

- Offensive remarks, derogatory terms, nicknames, or comments, jokes, slurs, negative stereotyping, or intimidating acts that are based on a person's protected status.

- Written or graphic material circulated, available on the City's computer systems, or posted or distributed within the workplace that shows hostility toward a person or persons because of their protected status.

The City prohibits any such conduct in the workplace and in any work-related setting outside the workplace, such as during business trips, training, seminars, meetings, and work-related social events. This policy prohibits harassment or other workplace discrimination based on an individual's protected status, even if it does not rise to the level of a legal violation.

Sexual Harassment

Sexual harassment deserves special mention. Sexual harassment can take several forms. Sexual harassment includes any harassing conduct based on gender, gender identity, gender expression, or sexual orientation, regardless of whether the conduct is sexual in nature. Any unwelcome conduct based on gender, gender identity, gender expression, or sexual orientation is also forbidden by this policy regardless of whether the individual who engaged in the harassment and the individual being harassed are of the same or different genders.

Sexual harassment is defined as any unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature or a discriminatory nature when:

- Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment; or when

- Submission to or rejection of such conduct by an individual is used as a basis for employment or decisions affecting an employee; or when

- Such conduct has the purpose or effect of substantially interfering with an individual's employment or performance or creating an intimidating, hostile, or offensive employment environment.

Sexual harassment, as defined above, may include, but is not limited to the following:

- Offensive pictures, drawings, photographs, figurines, or other graphic images.
- Offensive sexual remarks, sexual advances, or requests for sexual favors regardless of the gender of the individuals involved.

- Repeated, unwelcome, sexually oriented verbal "kidding," criticism, or demeaning sexual innuendoes.
- Unwelcome touching, such as patting, pinching, or other physical contact of a sexual nature.
- Sexually demeaning or leering expressions, sexually suggestive or insulting noises, whistling, or comments, or obscene gestures.
- The display of sexually oriented visuals.
- Repeated unwelcome humor about sex or gender specific traits or stereotypes.
- Suggesting sexual involvement to or demanding sexual involvement of another employee, over whom the employee has supervisory authority or where such person has made it clear to an individual that such suggestion or demand is accompanied by implied or explicit threats concerning employment status or similar personal concerns.
- Sexual harassment may also include intentionally mistreating an individual because of the individual's gender and engaging in such harassing conduct continuously for such a period of time that the mistreatment substantially interferes with the employee's ability to perform their job.

Responsibility of Employees

Each individual employee has the responsibility to refrain from prohibited discrimination or harassment in the workplace. It is important that employees be sensitive to other employees' feelings. What may seem innocent behavior or a joke, may not be perceived the same way by another employee. Every employee is expected to avoid any behavior or conduct that could be interpreted as prohibited conduct under this policy.

Policy Prohibiting Retaliation

The City prohibits retaliation whether by supervisors, managers, co-workers or other third parties. Retaliation includes threatening an individual or taking any adverse action against an individual for:

- Making a good-faith complaint/report of harassment.
- Assisting or cooperating in an investigation of a complaint by someone else, whether internally or with an external agency.
- Filing a charge of discrimination or harassment; or otherwise providing information in a proceeding, including in a court, administrative or legislative hearing, related to violations of discrimination or harassment laws.

Examples of the types of retaliation that are prohibited include intimidation; discrimination; verbal or physical abuse; adverse actions with respect to pay, work assignments, and other terms of employment; termination of employment; or threats of any such actions. Any employee who retaliates against another for exercising their rights under this policy shall be subject to discipline up to and including immediate termination. All employees who experience or witness any conduct they believe to be retaliatory should immediately follow the complaint reporting procedures stated above.

Directors, managers, and supervisors as well as all City officials are covered by this policy and are prohibited from engaging in any form of harassing, discriminatory, or retaliatory conduct. No director, manager, supervisor, or City official has the authority to suggest to any applicant or employee that employment or advancement will be affected by the individual entering into (or refusing to enter into) a personal relationship or for tolerating (or refusing to tolerate) conduct or communication that might violate this policy. Such conduct is a direct violation of this policy.

Even non-employees are covered by this policy. We prohibit harassment, discrimination or retaliation of our employees in connection with their work by non-employees. Immediately report any harassing or discriminating behavior by non-employees, including but not limited to citizens, elected officials, appointed officials, contractors, subcontractors, vendors, etc.

Reporting Complaints of Discrimination or Harassment

Any employee who experiences or witness any conduct they believe is inconsistent with this policy is expected to immediately report the conduct to his or her immediate supervisor, Department Director or Director of HR.

> If you have any concern that the City's Non-Discrimination & Anti-Harassment policy may have been violated by anyone, you must immediately report the matter. Due to the very serious nature of harassment, discrimination and retaliation, you must report your concerns to one of the individuals listed below:

This policy does not require that the employee report the conduct to any individual who is engaging in the conduct. If the employee believes that any person to whom such a report should be directed is involved in or associated in any way with the alleged conduct, then the report should be directed to another Department Director not involved in the conduct. Employees need not follow the chain of command to report a complaint or discuss offending behavior with the employee offender.

Any supervisor or manager who has knowledge of suspected prohibited conduct, or to whom a complaint has been made, must promptly report the conduct to the Department Director and the Director of HR. The failure of a supervisor to report suspected violations of this policy may result in disciplinary action, up to and including termination.

Employees are encouraged to use the above complaint procedure to report and resolve their complaints of discrimination, harassment, or retaliation. However, all employees have the right to file formal charges with the Georgia Commission on Equal Opportunity.

City Investigation and Response

> You should report any actions that you believe may violate our policy no matter how slight the actions may seem.

Your notification of the problem is essential to us. We cannot help resolve a harassment problem unless we know about it. Therefore, it is your responsibility to bring your concerns to our attention so we can take necessary steps to address the situation. The City takes all complaints of unlawful harassment seriously and will not penalize or retaliate against individuals for reporting a harassment problem in good faith.

You will not be penalized or retaliated against for reporting improper conduct, harassment, discrimination, retaliation, or other actions that you believe may violate this policy.

All reports describing conduct that is inconsistent with this policy will be investigated promptly. Our investigation will be timely and impartially handled by a qualified person who will allow for appropriate due process and reach a reasonable conclusion based on the information collected. The City may put reasonable interim measures in place, such as a leave of absence or a transfer, while the investigation takes place. Although complete confidentiality in investigating complaints and imposing any discipline cannot be guaranteed, the City will attempt to preserve confidentiality to the extent that the needs of the situation permit.

If an investigation reveals that a violation of this policy or other inappropriate conduct has occurred, then the City will take corrective action, including discipline up to and including termination, as is appropriate under the circumstances, regardless of the job positions of the parties involved. The City may discipline an employee for any inappropriate conduct discovered in investigating reports made under this policy, regardless of whether the conduct amounts to a violation of law or even a violation of this policy. If the person who engaged in conduct that violates this policy is not employed by the City, then the City will take whatever action is reasonable and appropriate under the circumstances.

It is critical in establishing a workplace free of harassment that an individual who experiences or witnesses an incident perceived as being harassing has access to a mechanism for reporting such incidents. At the same time, the purposes of this policy against harassment in the workplace are not furthered where a complaint is found to be false and frivolous and made to accomplish some other end than stopping harassment. A complaint that is determined to be false and frivolous can result in a severe level of discipline or discharge. A false or frivolous complaint does not refer to complaints made in good faith that cannot be proven.

All employees are expected to fully cooperate with the City during any investigation.

PARKING LOTS & ROADWAYS

Employees must park their vehicle(s) in the areas designated for employee parking. If you have any questions as to where you should park, please ask your supervisor.

You may not park in areas marked for visitors, handicap (without a valid permit), non-parking, and non-authorized places. Employees found parking in a restricted area will be subject to disciplinary action and being towed.

The City prohibits speeding or operating a motor vehicle in a reckless manner on City property or City time. Speeds on City property must not exceed ten (10) miles per hour. City roadways and parking lots are considered as much a part of the City complex as the inside of a building, and you are subject to all City rules in City roadways and parking lots.

PERSONAL TELEPHONE CALLS & VISITS

The City has a limited number of telephone lines, and we must keep these lines open for business calls. Therefore, we ask all employees to refrain from making or receiving personal calls, except for emergencies. Additionally, employees must limit personal cell phone use to non-working time such as lunch and breaks.

All visitors on City property are required to follow City rules. Any visitor who refuses to obey these rules will not be allowed to return. Visits to an employee by friends or relatives can be disturbing to our operations. We strongly discourage such visits during work hours.

REPORTING OF ACCIDENTS & HAZARDS

All accidents (including those which do not involve serious injury and those involving the public) must be reported immediately to your supervisor. Supervisors, in turn, are required to notify the Finance Department – Risk Management Division. Likewise, immediately report any unsafe conditions, defective tools or equipment, or other hazards to your supervisor. Each employee is expected to assist the City in maintaining safe conditions.

SAFETY

The health and well-being of all employees are foremost among our concerns. You must follow common-sense safety practices. You must also correct or report any unsafe condition, or defective or malfunctioning tool or equipment to your supervisor. All employees must cooperate with the City in maintaining safe working conditions. The City's Safety Manual is available in the City's Intranet.

All employees are required to adhere completely to all City and OSHA safety requirements, as well as state and federal laws and insurance company requirements. Employees should check with their supervisor or Department Director for specific department policies regarding safety. Failure to comply with safety requirements will result in discipline, up to and including immediate termination.

Basic rules include:

- Do not remove guards or other safety devices, except pursuant to proper maintenance and repair guidelines.
- Never operate equipment without required grounding.
- Do not attempt to service, clean or grease a machine which is running, except as may be safely required.
- Promptly report all hazardous conditions, broken equipment, or unsafe practices to your supervisor.
- Always wear a seat belt in a running vehicle.
- Follow all safety rules and only operate equipment for which you have been authorized and properly trained.
- Use personal protective equipment (PPE) when required.
- Use safe lifting techniques.
- Report all accidents immediately to your supervisor.
- Refrain from horseplay and practical jokes.
- Follow lock out - tag out rules.
- Adhere to OSHA, insurance, and other legal requirements.

Employees are required to immediately notify their supervisor, in the case of any occurrence that results in injury, regardless of how minor the injury may initially appear. Such reports are necessary to comply with laws and initiate Workers' Compensation benefit procedures.

SEVERE WEATHER & EMERGENCIES

The continuity of critical operations and services during adverse weather or other emergency conditions is essential. Departments may be required to maintain the minimum level of staffing needed to provide such services. Under conditions of emergencies and or closings, essential employees may be required to report to work, regardless of the weather and regardless of whether the City is "closed."

In instances where City is declared "closed during regular business hours" by the City Administration, non-essential personnel will be excused from reporting to work without having to use PTO.

Department Directors and/or their designee are responsible for defining and posting a list of essential employees and notifying those employees of their "essential" status in a given situation. During an emergency and/or closing an employee that is not listed on the standing "essential personnel staffing list" may still be designated as essential and must report to work. (NOTE: An employee may be designated as essential in one given situation (e.g. flood) and non-essential in

another situation (e.g. ice storm). The decision to designate an individual as essential is determined by the Department Director or designee.)

Employee Notification: In the event of severe weather and/or other emergencies, employees should check the City website and listen to local newscasts for delayed opening or closing information. Unless otherwise notified by these means or direct communication from the City, all personnel are to assume the City will be open for business regardless of any weather or other emergency condition. Non-essential employees should make every effort to report to work when the City is open unless your personal safety or the safety of your family is at risk. A non-essential employee who is not able to report to work must follow the normal "call-in" procedures to report their absence. If a non-essential employee makes every effort to safely report to work and notify their supervisor of their absence according to the normal "call-in" procedures, the absence will be excused, and the time charged against the employee's available PTO balance.

Closings and Delayed Openings

1. Full Closing: If City offices are fully closed, employees who are not designated as essential will be excused from work. Essential employees may be required to report to work. Essential employees who do not report to work during closed status when required to do so will be placed on unauthorized leave without pay status and may be subject to disciplinary action up to and including termination of employment.
2. Early Closing: If City offices are closed early, employees who are not designated as essential will be excused from work. Essential employees may be required to remain at work. Essential employees who do not remain at work when required to do so during closed status will be placed on unauthorized leave without pay status and may be subject to disciplinary action up to and including termination of employment.
3. Delayed Openings: If the opening of City offices is delayed, essential employees may be required to report to work for normal or extended work hours. All non-essential personnel are expected to report at the announced / broadcast time. If an employee reports later than the announced / broadcast opening time, the employee will be charged PTO time for the period of absence between the delayed opening time and the time the employee actually reports for duty.
4. In the event that the opening of offices is delayed, non-essential personnel that work flexible schedules will revert back to the standard City work schedule. For example, if the employee's flexible schedule is from 7:00 AM to 4:00 PM and City offices open at 10:00 AM, the employee would report for work from 10:00 AM until 5:00 PM. If the employee leaves earlier than 5:00 PM, the difference in hours will be charged against the employee's available PTO balance.
5. Partial Closings / Locations: If the emergency or other circumstance is limited to a portion of City offices, employees may be relocated to an unaffected designated area of the City. Employees who fail to report to the designated location may be placed on unauthorized leave without pay status and may be subject to discipline up to and including termination of employment.

Compensation: If City offices are declared closed due to a severe weather or emergency event, all employees who are not required to report to work will receive regular pay for the day or shift.

Non-exempt employees who are required to report to work during a severe weather or other emergency event will receive overtime pay for hours worked, in which the City was closed during regular business hours. Exempt employees who are required to work due to the severe weather or other emergency are not eligible for overtime payment.

In the event of a delayed opening or early closing of City offices, non-essential employees who work for the portion of the day for which City offices are open will be paid for the full workday.

Paid Time Off (PTO): In the event that City offices are closed or subject to delayed opening or early closing due to a severe weather or emergency event, non-essential employees who are on pre-approved leave will have PTO time charged against their available PTO balance for the time in which the City is officially closed.

For essential employees, the Emergency Management designee or Department Directors are authorized to cancel previously approved leave in order to ensure that such essential employees are available for work during the emergency period.

TOBACCO & SMOKING

In the interest of promoting health and safety, the City's smoke-free policy applies to all City facilities (including vehicles), all City employees, and all residents and vendors who visit City facilities.

Employees are prohibited from using tobacco products or smoking materials in any form during work hours, when representing the City and within City property.

For purposes of this policy, "City property" shall include any and all City owned vehicles, buildings owned, leased, rented and areas maintained by the City, any grounds, parking lots, and construction or worksites under City of Alpharetta control. Smoking is prohibited by law in any area where paint or other flammable materials may be present.

The use of "tobacco products or smoking materials" refers to the lighting and smoking of cigarettes, cigars, pipes, and or other similar items such as electronic cigarettes and "vaping" devices, as well as the use of smokeless tobacco products.

These restrictions are absolute. In no instance may a smoker request permission, or a non-smoker grant permission, for smoking to take place in any of the areas or under any of the circumstances previously described in this section.

USE OF CITY PROPERTY & EQUIPMENT

Employees are expected to learn and follow all operating instructions, perform preventive maintenance, where applicable, and observe all safety practices. If you are unsure about the proper operation or maintenance of the City's property or equipment, ask your supervisor. Property and equipment that appears damaged, defective, unsafe, or in need of repair should be reported promptly to your supervisor.

Employees causing damage to the City's property and equipment may be subject to disciplinary action up to and including immediate termination. This includes loss or damage due to carelessness, negligence, improper use, or unsafe practices. Monetary reimbursement to the City may also be required if applicable.

VEHICLE & DRIVING REQUIREMENTS

This policy is intended to provide a basic framework governing the use of City vehicles, and as such, cannot contain procedures governing every situation that might arise. As with your personal vehicle, driving is a privilege and not a right. *Where departments have more stringent procedures for the use of City vehicles, they shall take precedence over this policy if said procedures have been approved in writing by the Director of HR.*

Official Use:

City Vehicles shall be used only for official City business. Official City business is defined as performance of job or operational requirements or travel to an employee's official duties. The employee may use a City vehicle for necessary personal business only when all of the following conditions exist:

1. The employee is in route between locations for official City business or, as related to take-home vehicles, when in route between home and the workplace; and
2. The use is "de minimus" in time and value. Personal use is bound to limits of reasonableness and public responsibility.

City vehicles shall be driven over the most economically direct route, taking into account exceptions due to safety needs, road considerations, vehicle capabilities, and traffic considerations.

Assignment of City Vehicles:

The assignment of City vehicles shall fall into one of the following criteria and be subject to the requirements and guidelines noted.

1. Daily / Temporary Vehicle
   Departments that have been provided City vehicles may assign employees vehicles for daily or temporary use for the purpose of conducting City business. Only City employees who have received permission from their Supervisor and/or Department Director shall drive City vehicles. Departments shall assign such vehicles in a manner consistent with operational requirements and workload.
2. Standby Vehicle

Those employees assigned on-call duty, or who expect to be called back to work, or who return to work before the next regular workday may temporarily take vehicles home. In no circumstances shall commuting be allowed on a regular basis except as authorized by the Take-Home Vehicle section outlined below.

3. Take-Home Vehicle
An employee who is assigned a take-home vehicle may drive the vehicle to and from their home only when one of the following conditions exists:

   A. The employee is a law enforcement officer performing duties related to public safety. Law enforcement personnel should also consult current City Fleet and Police Department ~~of Public Safety~~ policies and procedures for rules and regulations that are not addressed in this policy.

   B. The employee is on 24-hour call as part of their work duties and the vehicle is essential for the performance of those duties.

   C. The employee needs a vehicle after the completion of the regular workday to complete City business on the same day or before their usual work hours.

   D. The employee is engaged in authorized travel outside of the City (e.g. authorized training, seminars, etc.).

      a) Requests for vehicles for travel should be made to the requesting employee's Department Director at least 1 week in advance of the anticipated need, if possible.

      b) The vehicle shall be returned immediately upon completion of the authorized travel.

      c) The driver must clean the interior of the vehicle and notify their Department Director of any malfunctions or repairs needed.

      d) The employee should consult the City's Travel Policies for a listing of reimbursable expenses.

   E. By virtue of their position, the employee has been approved and authorized for take-home vehicle use by the City Administrator.

   Take-home vehicles may be assigned only to those employees who live within a 30-mile radius from City Hall. ~~In the case of uniformed Public Safety Officers, the maximum radius shall be established in the policies of the Department of Public Safety, upon approval of said policy by vote of City Council.~~ If an employee who has been assigned a take-home vehicle relocates outside of that radius, the assignment of the take-home vehicle shall be rescinded.

   Take-home vehicle assignments will be made in writing by the Department Director and approved by the Director of Finance and City Administrator. The Department Director shall address the rationale for the request and how the request meets the criteria listed above. The City Administrator or the Department Director may rescind the assignment of a take-home vehicle(s) at any time. See *City Fleet Policy* for more information.

   When an employee assigned a City take-home vehicle is on PTO, FMLA, or on extended leave of absence, the Department Director shall determine whether or not that vehicle shall remain

on City property during the absence. This is to ensure the safety of the vehicle and to make it available to other employees during that time.

General Guidelines and Requirements:
The following general rules and guidelines pertain to all use of City vehicles as well as to an employee who may drive a personal vehicle for City business. Violation of any of these or any departmental vehicle rules may result in discipline up to and including immediate termination.

1. Driver's License:
   All employees who drive as part of their job duties must have a valid Georgia driver's license. Any employee whose driver's license is suspended or revoked must report the suspension or revocation to the Safety & Risk Coordinator within 24 hours of the suspension or revocation.

2. Damage to City Vehicles:
   If a City vehicle incurs any damage while under the charge of a particular employee, that employee must report the damage immediately and may be responsible for paying for some or all of the repair costs, to be determined in the City's sole discretion.

3. Traffic Citations:
   If an employee receives a citation for any violation while operating a City vehicle or a personal vehicle while on City business, the employee is responsible for paying any fine or penalty incurred and may be subject to discipline, up to and including immediate termination. All such violations or citations must be reported to your Department Director immediately. Failure to immediately report a violation or citation may result in discipline, up to and including immediate termination.

4. Alcohol and Drugs:
   Drinking alcoholic beverages or otherwise violating the drug and alcohol policy is prohibited in a City-owned vehicle or in a personal vehicle while on City business. Violation of this rule may result in disciplinary action, up to and including immediate termination.

5. Smoking:
   Smoking, vaping, or use of tobacco products is prohibited in all City owned vehicles. See Tobacco and Smoking Policy.
6. Unacceptable Driving Records:
   For employees who drive vehicles in the course of their duties, an accident, a citation for D.U.I., D.W.I., or any other serious driving violation or citation (even those occurring off-duty) may create an unacceptable driving record. All such violations or citations must be reported to your Department Director immediately. An unacceptable driving record may result in an employee not being allowed to drive a City vehicle or other discipline, up to and including immediate termination.

7. Seatbelts:
   All employees must wear a seatbelt while driving or riding in any vehicle, either personal or City-owned, while going to or from work, and at all times while performing City business.

Furthermore, the City encourages all of its employees to wear seatbelts at all times, as required by state law.

8. Motor Vehicle Record Checks:
   For employees who drive vehicles in the course of their duties, the City may check motor vehicle records ("MVR") of all applicants prior to making them offers of employment and of all current employees at least once each year. As part of the hiring process, applicants will be required to sign a written consent form allowing the City to check their MVR at any time prior to or during their employment.

9. Reporting of Traffic Incidents:
   Employees who drive either personal or City vehicles in the course of their duties must report in writing to their supervisor any citation, D.U.I., D.W.I., violation or accident ("incidents") that occur at any time (on or off duty) after beginning employment with the City. Failure to report such incidents within forty-eight (48) hours of occurrence (i.e., accident or receipt of citation, not conviction on the charges) may result in discipline, up to and including immediate termination.

10. Federal Motor Carrier Safety Requirements (FMCSR's) for Designated Truck Drivers:
    Some truck drivers must undergo a DOT physical and obtain a commercial driver's license prior to driving trucks. DOT drivers must maintain their commercial driver's license. Additionally, delivery vehicles can never be used to carry passengers.

11. Use of City Vehicles by Employees on Light / Restricted Duty:
    Employees who have been assigned to modified duty (also referred as light or restricted duty) by the City as a temporary accommodation, based on a medical care provider's recommendation shall not operate City-owned vehicles for the duration of the modified duty assignment. This restriction applies regardless of whether the medical provider has indicated that the employee is capable of operating a vehicle. If it is believed that an exception to this policy should be made, the employee's Department Director shall submit to the Director of HR and the Director of Finance a written request for consideration of waiver. Any decision to grant such waiver shall be solely at the discretion of the Director of HR and the Director of Finance and shall be made on a case-by-case basis and does not establish precedent for future accommodations.

12. Use of Mobile Phones and Other Telecommunications Devices:
    When operating a City vehicle or a personnel vehicle while on City business, an employee must remain in full compliance with the Georgia Hands-Free Driving Law. In brief, this means that while operating a motor vehicle an employee shall not have a phone in her/his hand or use any part of her/his body to support a phone. Drivers can only use their phones to make or receive phone calls by using speakerphone, earpiece, wireless headphone, phone is connected to vehicle or an electronic watch. A driver may not send or read any text-based communication unless using voice-based communication that automatically converts message to a written text or is being used for navigation or GPS. A driver may not write, send or read any text messages,

e-mails, social media or internet data content. A driver may not watch or record a video; however, continuously running dash cameras are exempt from the video recording prohibition.

WORK AREA APPEARANCE

We expect employees to maintain their work areas in a clean, neat, professional, and acceptable manner. Each employee is expected to maintain their designated work area, and all employees are expected to maintain the common areas.

WORKPLACE CHEMICALS

The City maintains a Hazard Communication Program aligned with the Globally Harmonized System of Classification and Labeling of Chemicals ("Hazard Communication") which includes lists of all chemicals with which you work which may in any way be hazardous. The City also maintains copies of Material Safety Data Sheets (MSDS) on each chemical, which explain how to safely work with that chemical, and a written description of our program. The City will provide training before you are assigned to work with or be exposed to a chemical that OSHA has declared "hazardous" in any way. Before you start a job using chemicals, you should always read container labels or consult with your supervisor about the MSDS, including what, if any safety equipment you should use. Employees should evaluate any unusual or non-routine task for chemical hazards and discuss with your supervisor or manager if necessary. Immediately notify your supervisor of any chemical containers which are leaking, are unlabeled, or where you are uncertain of how to dispose of a chemical.

If you buy new chemicals, always obtain a copy of the MSDS and give it to your supervisor before you use the chemical.

Copies of our Hazard Communication materials may be obtained from your Department Director.

WORKPLACE VIOLENCE & SECURITY

Nothing is more important to the City than the safety and security of its employees. Threats, threatening behavior, or acts of violence against employees, visitors, guests, or other individuals by anyone on City property or while engaged in City business will not be tolerated.

Any employee who commits or threatens to commit any violent act against any person while on City premises, or while engaged in City business off the premises, will be subject to immediate termination. Violations of this policy may also include arrest, and prosecution.

Any person who makes substantial threats, exhibits threatening behavior, or engages in violent acts on City property shall be removed from the premises as quickly as safety permits, and shall remain off City premises pending the outcome of an investigation. The City will initiate an appropriate

response. This response may include, but is not limited to, suspension and/or termination of any business relationship, reassignment of job duties, suspension or termination of employment, and/or criminal prosecution of the person or persons involved.

No existing City policy, practice, or procedure should be interpreted to prohibit decisions designed to prevent a threat from being carried out, a violent act from occurring, or a life-threatening situation from developing.

All City employees are responsible for notifying their supervisor or anyone in management of any threats, which they have witnessed, received, or have been told that another person has witnessed or received. Even without an actual threat, employees should report any behavior they have witnessed which they regard as threatening, or violent, when that behavior is job related or might be carried out on a City site or is connected to City employment. Employees are responsible for making this report regardless of the relationship between the individual who initiated the threat or threatening behavior and the person or persons who were threatened or were the focus of the threatening behavior.

In addition, all individuals who apply for or obtain a protective/restraining order which lists City facilities as being protected areas must provide to the Director of HR and the Department Director a copy of the petition and declarations used to seek the order, a copy of any temporary protective/restraining order which is granted, and a copy of any protective or restraining order which is made permanent.

The City understands the sensitivity of the information requested and will attempt to preserve confidentiality to the extent that the needs of the situation permit.

FIREARMS: The City prohibits employees and all other persons (other than law enforcement and authorized security personnel) from having firearms in working areas, in buildings or on their person during working time or while performing work. Firearms are prohibited on all City property and in City vehicles. The only exception to this rule is that a person with a current Georgia license to carry a firearm may keep a firearm in their personal vehicle so long as it is kept out of sight in a locked, enclosed compartment or area of his or her vehicle in the City's parking lot. Anyone who has a license to carry a firearm and will have the firearm on City property must notify the City and provide a copy of his or her license.

Failure to provide the City with a copy of a current firearm license, to properly secure and protect a firearm or to comply with this policy may subject an employee to discipline, up to and including immediate termination. Employees who have questions concerning the application of this policy, should consult their supervisor immediately.

WEAPONS AND DANGEROUS INSTRUMENTALITIES: Except as otherwise stated in this Handbook, ammunition, explosives, weapons or dangerous instrumentalities of any kind are prohibited on City property (except as expressly allowed by Georgia Law) and in City vehicles at any time. Likewise, no employee should possess any ammunition, explosive, other weapon or dangerous instrumentalities at any time while performing any work for the City. Although the City retains the

right to determine the scope of this paragraph on other weapons and the terms contained in it, "possess" as used in this policy generally means to have on your person, in your vehicle or any vehicle assigned to you, or in other property in your presence or under your control (such as bags, packages, purses, briefcases, desks, toolboxes, lockers, etc.), while on City premises or while you are at work for the City.

Any violation of this policy may subject an employee to discipline, up to and including immediate termination. Employees who have any questions concerning the application of this policy should consult their supervisor immediately.

RECORDS AND CONFIDENTIALITY

BUSINESS RECORDS

The City and its employees maintain various types of written and electronic records related to the City's business. All such records maintained on the City's premises and in the City's systems are considered to be City property and, thus, are subject to review or inspection by the City, its employees, or agents at any time without further advance notice. For these and other reasons, please do not use our computer systems or other business systems for personal matters or matters that are not related to the City's business. Furthermore, employees must remember that almost all City records are available to the public and others pursuant to open record laws.

CHANGES IN PERSONNEL RECORDS

To keep your personnel records up to date, to ensure that the City has the ability to contact employees, and to ensure that the appropriate benefits are available, employees must promptly notify the City of any change of name, address, phone number, number of dependents, or other applicable information.

CONFIDENTIAL INFORMATION

Employees may, by virtue of their employment with the City, obtain access to sensitive, confidential, restricted and proprietary information about the City or its citizens that is not generally known or made available to the public and that the City has made reasonable efforts to keep confidential, including but not limited to financial records, vendor records and files, referral or mailing lists, credit card numbers, and similar information whether stored electronically or in paper format.

Such confidential information shall be used solely by employees in the performance of their job duties for the City and shall not be used in any other manner whatsoever during their employment. Employees shall not, without the prior written consent of the City, use, disclose, divulge, or publish to others any such confidential information acquired in the course of their employment. This prohibition expressly includes such information in electronic form. Such confidential information is

the exclusive property of the City and under no circumstances whatsoever shall employees have any rights to use, disclose or publish to others such confidential information subsequent to the termination of their employment.

> Unauthorized use or disclosure of confidential information may result in discipline, up to and including immediate discharge, prosecution, or other available action.

Upon termination, you must immediately deliver to the City any and all confidential information, whether stored electronically or in paper format, including but not limited to all copies of such documents prepared or produced in connection with your employment with the City that pertain to the City's business or your services for the City, whether made or compiled by you or furnished to you in connection with such services to the City. In addition, at termination, you must return to the City all of the City's non-confidential property, documents, or electronic information.

This policy does not limit the common law and statutory rights of the City. Likewise, this policy does not limit (and will not be enforced so as to limit) your rights to discuss your wages, hours and other terms and conditions of employment with others.

CONTACT WITH GOVERNMENTAL AGENCIES

Anyone who is contacted by a representative of a governmental agency or unit (which is not part of the City), including a process server, should not accept any document on behalf of the City and should not answer any questions on behalf of the City. The government representative should instead be referred immediately to the Director of HR. The purpose of this policy is to ensure that City management receives all information pertaining to the City at the earliest date possible so it may fulfill any obligation imposed upon it by law or regulation. This policy is not designed to prohibit an individual's cooperation with a government investigation.

PERSONNEL FILES & ACCESS TO EMPLOYEE INFORMATION

HR Department is the official keeper of personnel records for every employee. The City maintains secure, electronic personnel records for each employee within the Employee Portal (portal) accessible via HR SharePoint site (https://alpharetta.sharepoint.com/sites/HRInfo). Employees may access their personnel files, including employment documentation, performance reviews, and training records, at any time through this portal. Personnel files and medical records are maintained by HR and Finance - Benefits Division and remain confidential.

Access and Confidentiality:

Confidentiality and Release of Information: The City will only release information contained in personnel records if requested by the employee, by court order, as required by the Freedom of Information Act, or on a need-to-know basis by City management or designated representatives.

Limitations on Third-Party Disclosures: The City will NOT share information regarding benefits, terms, or conditions of employment with third parties, including spouses or other relatives, unless permitted by law or authorized in writing by the employee.

Employee Access to Personnel Records:
Review Rights: Employees have the right to review their electronic personnel files directly through the portal at any time during their employment with the City. For employees who do not have portal access or in specific circumstances, HR can provide electronic or hard copies upon written request.

Request for Corrections: Employees should notify HR in writing if they identify any inaccuracies or need updates to their personnel records. HR will review such requests and make appropriate updates in a timely manner.

Record Integrity: To ensure records are secure and accurate, employees may only access their files electronically through the portal. Removal or alteration of personnel records is not permitted.

Provision of Copies: Upon request, HR will provide physical copies of an employee's records within a reasonable time upon written request if necessary.

UNAUTHORIZED RECORDING

To maintain the security of our premises and systems, the City prohibits unauthorized photography or audio and video recording by an employee. Do not use a cell phone or any other device to make any type of photograph or audio or video recording, unless otherwise authorized by your supervisor while performing your duties, such as taking pictures or videos to document cases in the field. Authorization for any type of recording requires the advance written approval of the Director of HR. Violation of this policy may result in discipline, up to and including immediate termination of employment. This policy is not intended to prohibit, or chill employee rights protected by Section 7 of the National Labor Relation Act.

WORKPLACE ACCOMMODATION

LIGHT DUTY

The purpose of establishing a light duty program is to provide **temporary** work for employees who are injured or incapacitated to such an extent that they cannot be assigned to regular duty but are healthy enough to perform modified duties. Light duty may be allowed where necessary and if meaningful work is available for which the employee is qualified to perform.

The purpose of light duty is to provide a progression of job duties that will return injured workers to their regular full duty positions. Light duty is a temporary measure and is not intended to remove or replace an employee's regular job duties on an extended or permanent basis. Nothing in this policy shall be construed to require the City to create a light duty assignment for an employee. Employees will only be assigned to light duty work when the City determines that a need exists and only as long as such need exists. While on light duty, medical appointments and treatments should be scheduled outside of working hours or at such times that allow for a minimal amount of time away from work. To ensure the employee is able to return to work as promptly as possible, the City expects that employees will adhere to their light duty restrictions during all of their off-duty hours, absent expressed written approval from a treating physician.

Eligibility:

Light duty assignments are temporary and are reserved for employees who will be able to recover from their injuries or medical condition to perform the essential functions of the job. This temporary, modified, or restricted duty assignment may include a modification of the employee's current duties, reassignment to other duties within the department, or assignment outside the employee's department. The terms and conditions of the light duty assignment, including job tasks and hours, shall be determined exclusively by the City.

The City may require an employee who is receiving Workers' Compensation benefits to return to work in a light duty assignment that the employee is qualified to perform. Light duty assignment will only be considered where the employee's treating physician or a City designated physician has determined the employee is physically able to perform the light duty assignment in a safe manner.

Generally, a light duty assignment may be offered to an employee when there is a reasonable expectation the employee will be able to return to regular duty within 90 days. An employee assigned to light duty will be assessed at the end of each 30-day period to determine status and ability to return to full duty. A light duty assignment will only be extended beyond 90 days if there is a reasonable expectation of a return to full duty within a short period of time.

It is the intention of any light duty assignment to facilitate the employee's return to the workplace while ensuring the employee remain focused on achieving maximum medical improvement so they may return to full duty with the City. While on light duty, employees will generally not be permitted to work overtime or engage in any secondary employment including self-employment. Employees must limit their physical activities to comply with the medical restrictions as outlined by their treating physician while at work as well as during their off-duty hours. Failure to adhere to the medical restrictions outlined by the physician, either at work or during off duty hours may result in the termination of the light duty assignment and may be grounds for disciplinary action up to and including termination of employment.

If an employee is unable to resume regular job duties at the end of an authorized period of light duty work, HR will meet with the employee to discuss employment status. The City may send an employee to a physician of its choice to determine if the employee is fit to return to work.

Generally, if at any point an employee is medically determined to have permanent or indefinite work restrictions, the temporary light or restricted duty assignment will not be considered or continued. In that event, the City will review the employee's situation to determine the appropriate steps to be taken, if any, under the Americans with Disabilities Act, other applicable law, and other relevant City policies.

Requesting Accommodations/Light Duty Assignment

1. If you need reasonable accommodations due to a disability or temporary light duty to comply with medical requirements or restrictions, you must contact HR as soon as such need is known or believed to exist.

2. Complete a "Request for Accommodations/Light Duty" form.

3. Along with the request form, your medical provider will need to provide medical documentation that clearly defines your specific job-related functional limitations.

The Assessment and Determination Process

1. HR will review the medical documentation, identify potential accommodations with you during the interactive process and assess the effectiveness that each possible accommodation would have in allowing you to perform the essential functions of your job.

2. HR and your supervisor will coordinate the accommodation that is the most appropriate for both you and the City's operational needs. While your preference will be given consideration, the City has the discretion to choose among equally effective accommodations and may choose the one that is least expensive, easiest to provide, or that imposes the least impact on day-to-day operations.

3. The City will provide accommodation only to the extent that such accommodation can be made without creating or being an undue hardship on the City, as provided by law.

MEDICAL EXAMINATION

HR may direct any employee to undergo a physical, psychological examination and medical test (including drug and alcohol screen) at any time, when such an examination or test may be necessary to determine the employee's fitness to perform the required duties of the position. All such examinations and tests will be performed by licensed medical professionals as appointed by the City, and at the City's expense.

Circumstances that may warrant an examination may include, but is not limited to, the following:

- An inability to perform job-related duties because of a physical or mental problem or condition.

- The employee's return from an extended absence, and/or light duty assignment, due to a serious injury or illness.

- The employee's return from a leave of absence, with or without pay.

- The transfer of an employee to a position that requires greater physical capabilities.

- To verify an employee's use of frequent and/or questionable PTO or disability benefits.

- An employee who appears to be working while under the influence of alcohol or drugs.

- Following an on-duty incident or accident.

NURSING MOTHERS

The City recognizes the importance of breastfeeding and supports the accommodation of mothers who choose to continue breastfeeding, nursing or expressing milk after their return to work.

Notification

1. Supervisor's responsibility
   As part of procedure for applying for maternity leave, mothers should be provided this policy and the request for breastfeeding form by the City.

   Upon receipt of request for accommodations for breastfeeding, the City must take the necessary steps to ensure that reasonable accommodations are made prior to employee's return to work. Supervisors should discuss accommodations and schedule adaptation with the employee prior to the return-to-work date.

2. Employee's Responsibility
   Employees must provide their supervisors with at least 4 weeks' notice of their intention to continue breastfeeding following maternity leave of absence. This provides the City time for necessary arrangements to be made.

Maximum Accommodations/Schedule Adaptation

The accommodations for breastfeeding will expire 1 year from the date of birth of the child. If the mother discontinues breastfeeding, the employee is obligated to notify her supervisor immediately. Failure to notify the supervisor upon discontinuing breastfeeding and continuing to utilize the accommodations and/or schedule adaptation would be considered a policy violation subject to appropriate employment sanctions.

Flexible Scheduling

A breastfeeding employee shall be allowed a flexible schedule to express breast milk for her infant child. The time allowed will not exceed the normal time allowed for lunch and breaks. Break time must, if possible, run concurrently with any break time already provided to the employee. The City

is not required to provide break time if to do so would unduly disrupt the City's operation. For time above and beyond normal lunch and breaks the employee may request use of available PTO benefit, early start time or leave for work later. All requests for time above and beyond normal lunch and breaks are subject to approval by the City based on operational needs.

Privacy/Accommodations/Designated Lactation Space

The City will make reasonable effort to provide a clean lockable private room (not a toilet stall or public restroom) or other location, in close proximity to the work area, where an employee can express her milk in privacy. The room should have a chair and accessible electrical outlets for an electric breast pump and if possible, a small table. A clean water source for washing hands and rinsing out any nursing equipment must be available; a restroom or break room with a sink does satisfy this requirement. It is the employee's responsibility to keep the location clean after each use and remove any personal items.

Nursing Child

Bringing a child to the workplace is not recommended. However, a mother may elect to nurse her child during the scheduled breaks in the designated area. The mother will make the necessary arrangement with her supervisor and childcare giver. The childcare giver will meet at the designated location and time. It is important that these schedule times do not disrupt the operations of the City. It is the supervisor's discretion to determine if disruptions do occur and may terminate the direct nursing of child and provide accommodations for pumping only.

Storing Breast Milk

The employee will provide their own containers and storage unit such as small ice chest or thermos from home. Any breast milk stored in the refrigerator must be placed on a high shelf in the shared refrigerator, not in the door panel and must be labeled with the name of the employee and the date of expressing the breast milk. Any nonconforming products stored in the refrigerator may be disposed of. Employees storing milk in the refrigerator assume all responsibility for the safety of the milk and the risk of harm for any reason, including improper storage, refrigeration and tampering. It is the employee's responsibility to remove expressed milk at the end of each day.

PREGNANT WORKERS FAIRNESS ACT (PWFA)

We are dedicated to fostering a fair and supportive work environment for all employees, including those who are pregnant, have recently given birth, or are affected by related medical conditions.

In accordance with the PWFA, employees who are pregnant, have recently given birth, or are experiencing related medical conditions are entitled to reasonable accommodations, as long as these do not impose an undue hardship on the City. The City is committed to ensuring that all practices and procedures comply with the PWFA, as well as all applicable federal, state, and local laws.

Employees seeking accommodations should notify HR as soon as possible. HR will work with the employee to determine a reasonable accommodation based on the individual's needs and the nature of the job.

The City strictly prohibits any form of discrimination, harassment, or retaliation against employees who are pregnant, have recently given birth, or request accommodations under the PWFA. Employees will not be penalized for requesting or using a reasonable accommodation. Employees who believe they have been denied reasonable accommodations, discriminated against, or retaliated against in violation of this policy should report their concerns to HR. All complaints will be taken seriously and investigated promptly.

REASONABLE ACCOMMODATIONS

With respect to applicants and employees with disabilities who are otherwise qualified for the job, it is the City's policy to make reasonable accommodations in accordance with applicable law. Persons with disabilities may request reasonable accommodations by directing their request to the Director of HR via their Department Director. The City will engage in an interactive process with employees to determine the nature of limitations and potential accommodations that might remove such limitations. As part of this interactive process, the City may request an employee to provide certain information from their health care provider regarding the employee's ability to perform the essential job functions with or without a reasonable accommodation.

The City will consider accommodation upon presentation of medical documentation supporting the need for a workplace accommodation; to the extent such accommodation does not pose an undue hardship on the ordinary operation of the business of the City, or could potentially result in an unsafe environment for the employee or others.

Any employee who has questions or concerns about reasonable accommodations in the workplace is encouraged to report these issues to the attention of HR. You can raise concerns and make reports and/or requests without fear of reprisal. Anyone who retaliates against any employee for reporting concerns or making accommodation requests will be subject to discipline, up to and including immediate termination.

WORK SCHEDULE & ATTENDANCE

ATTENDANCE, ABSENTEEISM & TARDINESS

Each employee plays an important role in getting the day's work done. You are expected to be in your work area on time each day, limit breaks to the time allowed, and stay at work until scheduled to leave. Absenteeism or tardiness, even for good reasons, is disruptive of City operations and interferes with our ability to satisfy our citizens' needs.

Instances of absenteeism or tardiness covered by the Family Medical Leave Act (FMLA), however, will not be counted as instances of absenteeism or tardiness for disciplinary action purposes. In addition, patterns of absenteeism such as before or after days off, patterns of occurrences during a month, etc. may be grounds for identifying abuse, whether or not established guidelines are exceeded.

In the event you are unable to report for work due to illness or other emergency, you must personally notify your supervisor as far in advance as possible so that proper arrangements can be made to handle your work during your absence. Of course, some situations may arise in which prior notice cannot be given. In those circumstances, you are expected to notify your supervisor as soon as possible.

Communication can be done verbally or through other electronic communication as accepted by your immediate supervisor. Notification of an absence does not guarantee approved use of benefit time for the absence.

Failure to report to work for 3 consecutive scheduled working days without notifying the City will be considered job abandonment and will result in termination of employment.

For the purposes of FMLA compliance, supervisors are required to notify Finance Department – Benefits of any:

- Full-time employee absence in excess of five (5) or more consecutive calendar days~~1 week~~ for anything other than approved personal time off.

- For part-time employee absence in excess of five (5) or more consecutive calendar days~~1 week~~, or when monthly required hours are not fulfilled, for any reason.

If you are absent for more than 1 day, you must call in for each day of absence unless you have been approved for a leave of absence.

Absences due to personal injury or illness, lasting more than 3 days will require a physician's statement prior to returning to work. The City reserves the right to request that employees provide a physician's statement at any time should sick leave abuse be suspected.

COMPENSATORY (COMP) TIME

The City does not allow the use of compensatory time ("comp time") as a means of compensating an employee who works in excess of the standard hours in a given pay period. If a non-exempt employee is authorized, by their immediate supervisor, to work in excess of their standard work hours in a given week, the employee must be compensated for the overtime hours worked during the pay period at the overtime rate of pay. Non-exempt employees receive straight-time pay plus half-time pay (the time-and-one-half rate) for overtime hours.

OVERTIME

The City may periodically schedule overtime work to meet City business needs. We will attempt to give employees advance notice, if possible.

Each Department Director is responsible for establishing internal controls in order to minimize such circumstances and assure overtime work is scheduled and paid in accordance with City policy, applicable State and Federal laws, and the regulations of the Fair Labor Standards Act (FLSA). We expect that all employees who are scheduled to work overtime or who are called out to work on a special project will be at work unless specifically excused by their supervisor. Failure to report for scheduled overtime work may result in discipline, up to and including immediate termination.

Overtime Hours: All hours worked in excess of 40 hours in a workweek are overtime hours except for Police and Fire Department shift employees who have other limits under the FLSA. For purposes of calculating overtime hours, only actual hours of work will be counted. Paid time off (PTO) is not counted as hours worked for purposes of calculating overtime hours. For purposes of calculating overtime only, official City-recognized holiday hours are considered hours worked, except as applied to employees of the Police or Fire Department who works a shift schedule.

Overtime Compensation: The City adheres to the requirements for overtime compensation under the Fair Labor Standards Act (FLSA), as outlined by regulations of the Wage and Hour Division. In accordance with these regulations, positions are classified as either exempt or non-exempt from eligibility for overtime.

Non-exempt employees receive straight-time pay plus half-time pay (the time-and-one-half rate) for overtime hours.

Non-exempt employees must receive approval from their supervisor prior to performing overtime work or they may be subject to disciplinary action up to and including immediate termination.

WORK SCHEDULE

For most employees, the standard workweek for full-time employees will be Monday through Friday, depending on the specific job requirements. The normal workday for full-time employees will be Monday through Thursday 8:30 a.m. – 5:00 p.m. and Friday 8:30 AM – 4:30 PM. "Normal" is defined as the schedule the employee will work most of the time. Due to operational demands, Department Directors, with approval from the City Administrator, may adjust an employee's work schedule as operational conditions require. If the schedule is changed, the change will be communicated to affected employees as far in advance as possible prior to the change.

Non-exempt employees are allowed to report to work up to approximately 30 minutes before the work schedule starts but should not perform any work before the normal schedule begins. Do not begin work and do not clock in more than 10 minutes before your normally scheduled shift, unless previously authorized by your supervisor. Likewise, stop work and clock out no more than 10 minutes after the end of your scheduled shift. In either instance, hourly paid employees must not perform work unless they are "on the clock."

Some employees may be required to attend City Council, committee, or other meetings outside of normal business hours. Questions regarding an employee's work schedule should be directed to their immediate supervisor.

Flexible Work Schedules: Department Directors may, upon review and approval of HR, approve a flexible work schedule, including remote work. Any such flexible schedule must meet the following criteria:

- The flexible schedule must ensure the department and/or facility is adequately staffed during normal business hours.
- The flexible schedule may not in any way reduce or negatively impact the level of service provided to or experienced by the public.
- The flexible schedule may not reduce the actual cumulative hours worked by any employee during a given work week from the number of hours that would be worked by the employee on a traditional schedule.
- The flexible schedule must comply with all other City policies and HR guidelines.
- Prior to implementation of a flexible schedule, a written document defining and governing the schedule must be provided to HR for review and approval. Changes to existing flexible schedules must also be approved by HR.

Lunch / Break Periods: The scheduling of an employee lunch period and rest breaks are at the discretion of their immediate supervisor. Employees may be required to take these breaks at different times, as departmental operations may dictate. Due to the responsibility of certain positions, an uninterrupted lunch period may not be guaranteed. In this case, the non-exempt employee will be paid for the lunch period.

Rest breaks may be established, not to exceed 15 minutes, once in the morning and once in the afternoon. Employees must be scheduled to work at least five consecutive hours to be eligible for a rest break. If a rest break is missed or not taken by the employee, no additional compensation will be awarded. Under no circumstances will rest breaks be combined to provide a 30-minute break during the workday.

Unpaid lunch periods are normally established for one hour. These breaks may be shortened to one-half hour, with approval from the employee's immediate supervisor.

Non-exempt employees are not permitted to use their workstation to take a meal break. All employees are required to be out of public view while taking a meal break within City buildings.

On-Call: The purpose of "On-Call Status" is to ensure the timely delivery of critical services outside of normal business hours when the need arises. It is intended for use primarily by departments such as Information Technology, Public Works, and Recreation and Parks (as well as some specified Police and Fire positions) for personnel who may be called upon to repair critical infrastructure or perform similar duties of an immediate need nature.

An employee designated as being in "On-Call Status" is required to remain in a "ready status" (i.e. available to respond) after regular business hours and be able to be in communication within 15 minutes of initial notification by the City. If an employee in "On-Call Status" must report to a specific location to deliver necessary service, the employee must be able to report to such location within 1 hour of being notified; however, the employee is not required to be at any particular place while in "On-Call Status" until such need to report is identified.

A non-exempt employee who is in "On-Call Status" will be paid a minimum of 2 hours per day at her/his standard rate of pay. Time spent "waiting to be engaged in work" (i.e. simply in ready status) are not considered "hours worked." If a non-exempt employee responds to a call, time towards "hours worked" will start from the time the employee receives the call: only the actual hours worked will be considered for purposes of calculating any applicable overtime compensation; however, the minimum "hours worked" to be earned by the employee shall be 2 hours.

Standby Status: The purpose of "Standby Status" is to ensure appropriate staffing for those positions within the Police and Fire Department ~~of Public Safety~~ that require minimum staffing levels be maintained during any shift. It is intended for use only to address unexpected staffing shortages resulting from illness, injury, or other unforeseeable circumstances. For purposes of this policy, "unforeseeable" shall mean a circumstance for which a supervisor has 4 or less hours' notice of the need.

An employee who is on "Standby Status" must be able to be in communication within 15 minutes of initial notification and be able to respond to their assigned duty station within 2 hours of initial notification (i.e. "activation").

A non-exempt employee on "Standby Status" who is activated by the City (i.e. ordered to report for duty) shall earn premium pay (defined as 1.5 times the employee's regular hourly rate) from the time they begin work at the duty station and will also receive an additional 2 hours of premium pay (said 2 hours not being considered "hours worked").

The Police and Fire Department ~~of Public Safety~~ and/or each division therein utilizing Standby Status is to compile and maintain a list of qualified employees who have volunteered to participate in the Standby Program (i.e. Standby Employee List).

When the need to activate a Standby Employee arises, the supervisor is to call the first employee on the list and work down through the list until the standby need is filled. Each employee contacted, regardless of acceptance of the standby assignment, shall be moved to the bottom of the Standby Employee List in the order in which was called by the supervisor.

An employee who has volunteered to be on the Standby Employee List may reject no more than 1 request to report for Standby Duty in any 4-month period or no more than 3 report requests in any calendar year. An employee who exceeds this standard shall be removed from the Standby Employee List and shall not be eligible for participation in the program for 12 months. Further, it shall be reflected and have an impact on the employee's annual performance evaluation.

Emergency Recall: The purpose of "Emergency Recall" is to ensure adequate staffing levels to effectively respond to incidents or emergency situations. "Emergency Recall" can be activated by an Incident Commander when determines that an incident or emergency situation will soon exceed or has already exceeded the capabilities of the entire on-duty staff.

- Level 1 Emergency Recall: All available personnel report to the designated rally point(s) and await transportation and/or further instruction.

- Level 2 Emergency Recall: Only those personnel specifically contacted report to the designated rally point(s) and await further instructions.

It shall be the responsibility of the supervisor or officer with oversight of the recalled employees to ensure that the names, reporting times, and release times of the employees are reported to the Incident Commander and departmental payroll coordinator.

Non-exempt employees activated under an "Emergency Recall" shall be compensated at premium pay (defined as 1.5 times the employee's standard hourly rate) only for the actual hours worked, which shall begin at the time they report to the designated rally point(s).

Daylight Savings Time (DST): In the spring, when transitioning to DST, non-exempt employees working during the 1-hour transition from Standard Time to DST will be paid only for actual hours worked.

In the fall, when transitioning to Standard Time, non-exempt employees working during the 1 hour transition from DST to Standard Time will be paid for actual hours worked, including overtime pay, if actual hours worked or counted as worked in that work period exceed the regular scheduled work hours.

PART 2 – BENEFITS HANDBOOK

HEALTH & WELLNESS

COBRA

Employees and their dependents participating in the City's group health plan may be eligible for 18 to 36 months of benefits continuation. Eligibility for this benefit continuation under COBRA (Consolidated Omnibus Budget Reconciliation Act) is triggered by a "qualifying event" such as reduction in hours of employment, divorce, or termination of employment for reasons other than gross misconduct and is subject to policy terms and conditions and applicable legal guidelines.

Information regarding COBRA continuation of health care coverage will be provided to eligible employees by Finance Department-Benefits Division.

FLEXIBLE SPENDING ACCOUNT (FSA)

The City offers a Flexible Spending Account that allows employees to setup accounts to pay for certain health and dependent care expenses on a pre-tax basis. Employee premium contributions for the City-sponsored plans may be paid on a pre-tax basis under this plan.

GROUP HEALTH BENEFITS

The City's group health coverage incorporates separate and optional medical, dental, and vision coverage for eligible employees and their eligible dependents. Regular full-time employees are eligible to enroll on the first of the month following 30 calendar days of continuous employment. For elected officials, eligibility begins on the first day of service. Employees make a small contribution to the total benefit cost. Insurance premiums and benefits are subject to change, and employees may be responsible for paying future increases.

The specific coverage of benefits for the plan year is defined in the contracted plan documents. All employees should familiarize themselves with the health plan definitions, specifically, the term "dependent". Enrolling a person who does not meet the definition of dependent in the plan is considered fraud and may result in dismissal. Employees may be asked to prove that a person listed as a dependent actually meets the definition. This may mean providing marriage and birth certificates or other proof.

Details of the insurance plans offered by the City are described in the Benefit Summary document. The Benefit Summary document and information on cost of coverage will be provided in advance of enrollment, and is available on the City Intranet, to eligible employees. Summary plan

descriptions (SPDs), which explain coverage of the medical, dental and vision insurance benefits in greater details, are available from the Finance Department – Benefits Division, and the City's Intranet. The SPDs are the final authority in all matters relating to the benefits described in this Employee Handbook and will govern in the event of any conflict. Additionally, the City reserves the right to change insurance carriers, change health maintenance organizations, self-insured, and/or change or eliminate any benefits at any time in accordance with applicable law.

The City contributes to the cost of the insurance plan at levels authorized by the City Council. Employee contributions towards premiums for such plan are subject to change at the City's discretion.

Unless otherwise set forth in an agreement, upon termination of employment or retirement, employees may elect to continue coverage in accordance with the Plan, under COBRA. at their own expense. Some employees may qualify for a retiree insurance subsidy as specified in this Employee Handbook.

LIFE INSURANCE AND ACCIDENTAL DEATH & DISMEMBERMENT (AD&D)

The City provides group life insurance and accidental death and dismemberment insurance equal to 3.5 times an employee's annual earnings up to the plan maximum (currently at 750,000). Spouse life insurance is $5,000 and dependent child life insurance is $2,500. Currently, the City pays the full cost of this benefit. In addition, an employee may choose to purchase supplemental amounts of voluntary life insurance for the employee, the employee's spouse, or the employee's dependent children. See the Finance Department - Benefits Division for more details.

SHORT-TERM / LONG-TERM DISABILITY BENEFITS (STD/LTD)

The City provides group short-term and long-term disability benefits for eligible full-time employees at no cost to employees. Check with the Finance Department – Benefits Division for more information regarding qualifying disabilities and reimbursement policies. The City currently pays for this valuable benefit.

Short-term disability benefits paid at 67% of employee's regular pay following 14 days of disability. Long-term disability benefits paid at 60% of employee's regular pay following 26 weeks of disability.

SOCIAL SECURITY & MEDICARE

Pursuant to the Federal Insurance Contributions Act (FICA), better known as the Social Security Act, the City deducts a percentage of your pay, matches it with an equal amount from the City, and sends it to Social Security and Medicare.

Social Security is more than just a retirement plan. It provides important life insurance and disability protection, as well as, health insurance (Medicare) for individuals 65+ years of age. For more information about FICA benefits, contact your local Social Security office or visit www.ssa.gov.

WELLNESS PROGRAM & INCENTIVES

The City recognizes the effectiveness of wellness initiatives on containing health care costs and as such offers certain incentives and premium discounts to employees and their dependents who participate. Wellness initiatives are determined annually by the City in consultation with our health care consultants. In order to receive certain discounts employees and/or their dependents may be required to sign affidavits, complete a biometric screening, complete a health risk questionnaire, meet with a health coach, or satisfy any other participatory requirement established by the City. Falsifying required information in order to receive a discount is subject to formal discipline and may result in dismissal.

WORKERS' COMPENSATION & HAZARDOUS DUTY

If an employee is injured in the course of their work, they may be eligible for benefits under the Workers' Compensation Act. Workers' Compensation pays for approved medical treatment associated with the injury and lost work time. Workers' Compensation protects you in the event of occupational injury or sickness occurring in the course and scope of employment and arising out of the specific circumstances and requirements of employment. You must report immediately any on-the-job accident or injury, no matter how small, to your supervisor or to the Safety & Risk Coordinator in the Finance Department within 12 hours of the event. Where medical care is required for on-the-job injuries, employees initially must go to one of the designated medical facilities listed on our Workers' Compensation panel.

The compensability of claims is determined on a case-by-case basis by the application of applicable Federal and State laws, court cases and general prudence using a team of professionals including outside counsel and a third-party administrator. The City has the right from time to time to determine that certain activities are not in the course and scope of any City employee's employment and any injury as a result of such activities shall not be construed as arising out of the employee's circumstance of employment.

The City believes it is in everyone's best interest to return employees with work-related injuries to full or modified duty as soon as practical. Efforts will be made to accommodate any work restrictions as determined by the physician(s), which will depend on the employee's restrictions and the business needs of the City. Light duty may be allowed where necessary and if meaningful work is available for which the employee is qualified to perform as outlined in the Light Duty Policy. Refusal of restricted duty will result in the suspension of Workers' Compensation benefits.

Falsification of a work-related injury is fraud and grounds for disciplinary action, up to and including termination.

The payment of temporary disability benefits determined to be compensable under the Workers' Compensation Act is made on the basis of 66 2/3% of an employee's earnings, subject to statutory maximums. Employees may choose to supplement the remaining earnings with their own PTO balance.

In some circumstances, an employee may be eligible for Hazardous Duty supplement for up to 6 months from the date of the injury and for a period no longer than 6 months per injury. This supplement is paid without reducing the employees PTO balance and brings the employee's compensation amount to a maximum of the employee's full base pay.

Hazardous Duty: A hazardous duty injury is defined as a bodily injury sustained by an employee while physically performing work on behalf of the City of Alpharetta. The injury must arise out of and in the course of employment and result from exigent circumstances that pose an imminent threat to life or limb. The circumstances leading to the injury must not be caused by, or contributed to, by the employee's own negligent actions. Hazardous Duty Pay is only applicable when the injury results in an approved Workers' Compensation claim, and the employee is actively receiving treatment from a medical provider authorized under the City's Workers' Compensation program. Employees who waive Workers' Compensation benefits are not eligible for Hazardous Duty pay.

The current Workers' Compensation reporting packet is available on the City's Intranet.

LEAVES OF ABSENCE

CIVIC RESPONSIBILITIES

We encourage all employees to accept his or her civic responsibilities. As a good corporate citizen, we are pleased to assist you in the performance of your civic duties.

Jury Duty: If you receive a summons for jury duty, you must notify your immediate supervisor as soon as possible so the department can plan work with minimum disruption. Employees must provide a copy of the jury summons and keep their supervisor informed of their jury duty schedule and any changes to their reporting status.

While on jury duty, the City will pay employees at their regular rate up to 8 hours per scheduled workday. PTO will not be charged for time spent in active jury service, and ~~the~~ employees will not be ~~asked~~ required to relinquish ~~their~~ jury duty compensation to the City. Judy duty hours do not count towards hours worked for overtime purposes.

Employees who are released from jury service, not selected to serve on a panel, or otherwise not required to be physically present in court during their regularly scheduled work hours – including periods of standby, call-back status, or when instructed to report at a later time – must notify their supervisor as soon as possible and report to work if directed. PTO will be charged for any hours of

the employee's assigned shift during which they were not required to be physically present in court but did not report to work when expected.

Employees who remain under court instruction to check in for possible service on subsequent days are expected to report to work during any portion of their regularly scheduled shift when they are not required to be physically present in court, unless otherwise directed by their supervisor.

For employees working extended or non-traditional schedules, including 12-hour, 24-hour or 48-hour shift assignments, supervisors will provide direction regarding reporting expectations based on operational needs and the employee's jury duty obligations.

Employees must provide documentation of attendance and/or release from jury service upon request.

~~Employees on jury duty must provide their supervisor with a copy of the subpoena. Employees who are released from jury service before the end of their regularly scheduled shift or who are not asked to serve on a jury panel are expected to call their supervisor as soon as possible and report to work if requested.~~

Witness Duty: If you are subpoenaed to appear as a witness, please notify your supervisor immediately so we can plan the department's work with as little disruption as possible. We do not pay employees who are subpoenaed to appear as witnesses for matters unrelated to City business. In these cases employees shall use accrue leave or may take ~~, but an employee may use PTO or take~~ unpaid leave if sufficient leave is not available.

City employees subpoenaed or ordered to attend court to appear as a witness or to testify in an official capacity on behalf of the City of Alpharetta, the State of Georgia, or the Federal Government will receive paid leave for the period, hours do not count as hours worked Such leave will not be charged to the employee's PTO account. Employees on a leave of absence for court appearance will promptly return to work on any days in which they are excused from court.

Employees on witness duty must provide their supervisor with a copy of the subpoena. Employees who are released from witness service before the end of their regularly scheduled shift are expected to call their supervisor as soon as possible and report to work if requested.

Voting: While polls are generally open for extended hours, , we realize that in some instances employees are required to work overtime and may find that these hours are insufficient to get to the polls. Mail-in and early voting are also available options. Employees who anticipate needing time off during their scheduled work hours should notify their supervisor in advance so that appropriate arrangements can be made. Non-exempt employees are required to use accrued leave if time off during work hours is necessary.~~If you anticipate any difficulty, please inform your supervisor so they can arrange for the necessary time.~~

FAMILY AND MEDICAL LEAVE ACT (FMLA)

Employees who have completed 1 year of continuous service and have worked at least 1,250 hours in the previous 12 months of employment may be granted a total of 12 weeks of leave in a rolling 12 month period measured backward from the date an employee uses any FMLA leave for their own serious health condition which prevents them from working, to care for their spouse or civil union partner, child (to age 18) or parent who has a serious health condition, to care for their child after birth or placement of a child for adoption or foster care placement, or because of any qualifying exigency.

Designation: FMLA leave is a federal entitlement, not an optional benefit, and eligible employees are covered by law. The City has both the right and the responsibility to timely provide employees with all required FMLA information and paperwork, and to designate leave as FMLA when there is sufficient information to determine that the leave qualifies under FMLA. This designation applies regardless of whether the employee has available PTO, other full or partial paid benefits, or is receiving Workers' Compensation benefits. Employees cannot decline or waive FMLA benefits or its designation, and PTO as well as Workers' Compensation leave will run concurrently with FMLA leave when applicable.

Employees who experience a period of incapacity lasting five (5) or more consecutive calendar days due to their own health condition or that of a family member will be required to provide medical certification. In such cases, the Benefits Division will issue FMLA paperwork to determine whether the absence qualifies for protection under the FMLA. Employees must return the completed certification within 15 calendar days of receipt. Failure to provide the required certification within this timeframe may result in a denial of FMLA protection for the related absence. This process ensures compliance with federal law and protects both the employees' rights and the City's obligations under the FMLA.

When the City employs both spouses or both civil union partners, they are jointly entitled to a combined total of 12 workweeks of family leave for the birth and care of a newborn child, for placement of a child for adoption or foster care or for qualifying exigencies. This limitation does not apply to leave due to the employee's own medical condition. When the City employs both spouses or both civil union partners, both employees are jointly entitled to a combined total of 26 workweeks of family leave to care for a covered service member with a serious injury or illness.

Leave for birth and care, or placement for adoption or foster care must conclude within 12 months of the birth or placement.

Intermittent Leave: Under some circumstances, employees may take FMLA leave on an intermittent or reduced schedule basis. That means an employee may take leave in separate blocks of time or by reducing the time he or she works each day or week for a single qualifying reason. When leave is needed for planned medical treatment, the employee must make a reasonable effort to schedule treatment so as not to unduly disrupt the employer's operations. Medical appointments and treatments related to an employee's or family member's serious health condition should be

scheduled outside of working hours or at such times that allow for a minimal amount of time away from work.

The use of intermittent leave for the purpose of a birth or care or placement for adoption or foster care is subject to the Director of HR approval.

If intermittent leave is foreseeable based on planned medical treatment, employees may be required to transfer temporarily to an available alternative position offered by the City for which the employee is qualified, and which better accommodates recurring periods of leave. Employees will be entitled to equivalent pay and benefits but will not necessarily be assigned the same duties in the alternative position.

In all instances of intermittent FMLA leave, the City requires recertification every six months. Employees shall provide a certification in support of leave on an annual basis if the need for leave continues for the same reason, subject to a second and third medical opinion as appropriate.

Military Caregiver Leave: Military Caregiver Leave permits eligible employees to take up to 26 weeks of leave to care for a covered service member. This leave is a one-time only requirement of the City and shall only be available during a single 12-month period. Employees may take this type of leave intermittently or on a reduced schedule when medically necessary. A covered service member is a current member of the Armed Forces, including a member of the National Guard or Reserves, who has a serious injury or illness incurred in the line of duty on active duty that may render the service member medically unfit to perform his or her duties for which the service member is undergoing medical treatment, recuperation, or therapy; or is in outpatient status; or is on the temporary disability retired list. The eligible employee can take up to 26 weeks of leave in a year (26 weeks total, not 26 weeks for Military Caregiver Leave plus 12 weeks of FMLA leave for other reasons outlined in the original Family Medical Leave Act).

In addition to spouses or civil union partners, children, and parents, the "next of kin" are eligible for this type of leave. The law defines next of kin as the service member's "nearest blood relative." This could include a number of relatives not covered by the Family Medical Leave Act entitlement, such as siblings, aunts, uncles, nieces, nephews, and cousins.

Use of PTO During FMLA Leave: Employees must utilize any accrued PTO or floating holidays during the FMLA period prior to non-paid time being approved. PTO will run concurrently with FMLA consistent with applicable leave policies.

Maintenance of Health Benefits: The City will maintain group health insurance coverage for any employee on FMLA leave who chooses to retain their coverage. Coverage will be maintained on the same terms as if the employee was continuing work, with the same premium payments due as if the employee was currently working. If the employee is utilizing accrued paid leave balances while on FMLA leave, the premiums will be deducted from the employee's paycheck. If the FMLA leave is unpaid leave, the employee must make arrangements with the Finance Department - Benefits Division for the insurance premium payments.

An employee can choose not to retain their health insurance coverage during the term of their FMLA leave. Upon their return to work, the employee's coverage will be reinstated on the same terms as they were prior to taking the leave, subject to any changes that may have occurred in the plan during their leave.

If an employee's premium payment is more than 30 days late, the City will terminate the group health plan coverage. The City will send the employee a written notice of its intent to terminate coverage at least 15 days before coverage is to cease.

Job Restoration: Upon returning from FMLA leave, an eligible employee will be restored to his or her original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. During the term of an unpaid FMLA approved leave, the employee will not continue to accrue additional benefits, nor lose any benefits earned or entitled to before the leave.

Notice And Medical Certification: Under those circumstances where the need for FMLA is foreseeable, an employee contemplating the use of such leave shall provide the Finance Department - Benefits Division with a written notice 30 days in advance of the expected birth, placement for adoption, foster care, planned medical treatment, or medical procedure for which FMLA is requested. If a 30-day notice is not practicable due to lack of knowledge, a change in circumstances, or medical emergency, notice shall be given as soon as possible. If the request is for an intermittent leave or leave on a reduced schedule basis, the employee shall also advise the Finance Department - Benefits Division of the reasons why the leave schedule is medically necessary along with the schedule of treatment.

When an employee seeks leave for a FMLA qualifying reason for the first time, the City will designate the leave as covered by this policy whether or not the employee has expressly requested FMLA leave. When an employee seeks leave, however, due to a FMLA qualifying reason for which the City has previously provided the employee FMLA protected leave, the employee must specifically reference either the qualifying reason for leave or the need for FMLA.

In all instances, the employee must answer questions and provide sufficient information to allow the City to determine whether an absence is for a FMLA qualifying reason. Failure to provide such information can result in a delay or denial of FMLA coverage.

When an employee requests FMLA leave or the City acquires knowledge that leave may be for a FMLA purpose, the Finance Department - Benefits Division will provide notice to the employee of their eligibility to take leave and inform the employee of their rights and responsibilities under FMLA. When the City has enough information to determine that leave is being taken for a FMLA qualifying reason, the City will notify the employee that the leave is designated and will be counted as FMLA leave.

Any employee seeking FMLA leave for medical reasons shall be required to first provide medical certification to the Finance Department - Benefits Division within 15 calendar days of request unless it is not practical under the particular circumstances to do so, despite the employee's diligent good faith efforts.

An employee who is required to provide such certification may be required to submit to a second or third medical exam as to the serious medical condition. The exam(s) would be at the City's expense. The employee may also be required to provide periodic recertification should the need arise. FMLA regulations allow the Human Resources and/or Finance Department - Benefits to contact the medical physician for two purposes only: clarification and/or authentication of the medical certification. Human Resources and/or Finance Department - Benefits may not request additional information beyond that included in the Medical Certification form. At no time may the employee's direct supervisor contact the physician for clarification or additional information.

Finance Department - Benefits Division may request recertification at any reasonable interval, but not more often than every thirty days, unless:

- The employee requests an extension of leave.
- A significant change in circumstances occurs.
- HR or Finance Benefits receives information that casts doubt upon the continuing validity of the leave.
- The employee is unable to return to work after the leave due to a serious health condition.

As part of the recertification, the City may provide the employee's health care provider with the employee's attendance records and ask whether need for leave is consistent with the employee's serious health condition.

In all instances of intermittent FMLA leave, the City requires recertification every six months. Employees shall provide a certification in support of leave on an annual basis if the need for leave continues for the same reason, subject to a second and third medical opinion as appropriate.

While on leave, an employee will be required to provide the Human Resources Department with periodic reports from their treating physician regarding the employee's status and ability or intent to return to work. If the circumstances of the leave change, and the employee can return to work earlier than the originally anticipated date or needs an extension of leave, the employee must give ten business days' notice to the Human Resources Department.

The HR Department may require the employee to provide medical documentation from their treating physician when the employee is able to return to work to verify fitness for duty in accordance with City policy or every 30 days when an employee takes intermittent leave for a condition that raises reasonable safety concerns regarding the employee's ability to perform job duties.

If an employee fails to provide the requested medical documentation, the Finance Department - Benefits Division may deny the leave itself, deny continuation of the leave or deny reinstatement until the appropriate medical documentation is provided.

Other Employment: See *Outside Employment*.

Failure to Return from Leave or to Comply with City Policy: Employees may be subject to immediate termination for:

1. Failure to return to work within 6 months of the beginning of any kind of authorized leave.

2. Failure to return to work upon expiration of FMLA covered period.

3. Failure to return to work as scheduled following the end of a medical or family leave.

4. Providing false or misleading information or omitting certain information in connection with a leave.

5. Violation of any of the City's rules and regulations relating to leave (or any other City policy or performance standard).

For more information refer to Appendix C – FMLA – Employee Rights.

GENERAL LEAVE OF ABSENCE

The City may authorize a leave of absence without pay for appropriate reasons. A leave of absence may be granted to an employee for such period of time as the City may determine and approval will be made on a case-by-case basis, according to the types of leave that are applicable to the circumstances. An employee must submit a written request to the HR Department for consideration and approval. Non-paid time off is only allowable if an employee has exhausted all other PTO and must be approved by the Department Director and the Director of HR.

Initial approval of leave will not exceed 12 consecutive workweeks. Extensions may be granted for additional periods of up to 12 additional workweeks, not to exceed a total of 24 workweeks, unless a further definitive period of leave may be appropriate as a reasonable accommodation. During the leave period, the employee may be required to report periodically to the HR Department on the status and the employee's ability or intent to return to work. No leave of absence will be granted to an employee for the purpose of accepting employment elsewhere, including self-employment.

Unless otherwise required by law, length of service and benefits will not accrue for an employee while on leave without pay but will begin to accrue again when an employee returns to work. During an approved leave, an employee may continue health insurance under the applicable group health insurance plan to the extent provided in such plan and by law. Employees may be required to pay the entire premium amount for continuation of benefits according to their benefit plan. Except where required by law, the granting of a leave of absence is not a guarantee of employment following the leave of absence. A failure to return to work at the end of an approved leave will be considered a voluntary separation from employment.

MILITARY TRAINING & LEAVE OF ABSENCE

Any employee who is a member of any active or reserve component of the Armed Services, the Georgia National Guard, or the Georgia Naval Militia, shall be allowed military leave from employment with the City for any period actively spent in military service including basic training and special or advanced training, whether or not within the State of Georgia, and whether or not voluntary. Such leave shall be granted for a cumulative period of service of no longer than 5 years, except as otherwise required by law. Employees must present a copy of their orders prior to taking military leave.

Military Leave by Type and Corresponding Pay and Benefits:

Voluntary Enlistment: Full-time and part-time employees who are inducted or join the armed services to serve a tour of duty are granted a military leave of absence without pay that coincides with the period of active service.

Leave Due to Mobilization by Presidential Order: Full-time and part-time employees who are members of any reserve component of the United States Armed Forces, including the Georgia National Guard, are entitled leave and to differential pay as provided by State law. This becomes effective when the employee is mobilized to active duty by an order from the President of the United States and only for the duration of the emergency.

- Health insurance and any other benefits that the employee was receiving at the time of mobilization will continue during this leave period as well.

- Employees mobilized by order of the President must submit copies of the orders and documentation of base salary prior to deployment, if possible.

Leave Due to Annual Training: In accordance with the Military Leave of Absence Act, full-time employees who are members of any reserve component of the United States Armed Forces or Georgia State Militia are entitled to leave and full pay to attend annual training. During this leave, which generally will not exceed 18 days (144 hrs., Fire 190.8 hrs.), the employee's seniority and other benefits shall continue to accrue. Part-time employees are provided leave but will not receive pay or benefits.

Leave Due to Special or Advanced Training: Full-time employees who are members of the aforementioned Military Services are entitled to leave up to 60 days of special or advanced training required by the Armed Forces. The employee's seniority and other benefits shall continue to accrue. Part-time employees are granted leave but not pay to attend basic training.

Procedures for Differential Pay and Benefit Continuation: Differential pay will be paid to the employee with regular payroll processing. In accordance with the Public Employee Armed Services Rights Act, PTO will continue to accrue while the employee is on leave. Any benefits the employee had before taking leave are preserved as well. Health insurance premiums may be deducted from the differential payments. In the event there is no deduction made for health insurance premiums, the employee is responsible for remitting payment to the City for monthly premiums.

Procedures for Leave Reporting: Employees must provide their immediate supervisor and Finance Department - Payroll Division with at least 30 days advance written notice prior to the start of leave for military service except in cases of national emergency. Such notice must include, without limitation, a copy of the employee's orders. Upon return to the City from military service, employees must submit a statement signed by an appropriate military official indicating the time spent in military training and/or service. Members of the National Guard or Reservists who have an advance schedule of monthly drills will provide that to their supervisor and the Finance Department - Payroll Division along with any other information which would prove helpful in scheduling for the employee's absence.

Upon the completion of active duty, employees must request reinstatement within 90 days after discharge to resume employment with the City. Barring changed circumstances, the City will reinstate an employee to the same or similar position without loss of seniority, benefits, or the rate of pay in effect prior to induction. An employee shall have no greater right to reinstatement than otherwise provided by law and must return from service with a qualifying discharge and able to perform the essential job functions of the former position.

OTHER LEGALLY REQUIRED LEAVES

In some circumstances, federal, state, or local law might provide for the provision of leave benefits beyond those listed in this Handbook. The law might impose restrictions on the employee regarding the manner in which such leave can be taken. The City will respect all legally required leaves. If an employee has any questions about those benefits, they should speak with the Human Resources Department.

PAID LEAVE

BEREAVEMENT LEAVE

Up to one week of paid bereavement leave will be granted to regular full time and part-time employees due to the death of a member of their immediate family as follows:

Part-time non-exempt	5 days of regular scheduled hours
Full-time non-exempt	37 hours
Full-time exempt, 911& Police sworn	40 hours

Fire Division sworn personnel	48 hours

The Director of HR may approve up to 2 additional days (16 hours), or additional 24 hours for Fire Sworn personnel, when extensive travel or other extraneous circumstances warrant.

For the purposes of bereavement leave, an employees' immediate family includes: spouse, domestic partner, child, step-child, parent, step-parent, sister, brother, stepsister, stepbrother, aunt, uncle, niece, nephew, mother- and father-in-law, daughter- and son-in-law, sister- and brother-in-law, grandparents, granddaughter, grandson, grandmother- and grandfather-in-law. All spouse related relationships apply to domestic partner.

Time off in connection with the death of one of the above-listed individuals should be organized with your Department Director or designee.

Bereavement pay is computed at the employee's regular shift hours multiplied by their regular straight time hourly rate of pay. Employees will not receive pay for any day for which they were not scheduled to work. Payment for bereavement leave will not be counted as time worked for the purposes of calculating overtime.

Bereavement leave is intended to provide employees with time off to attend services and/or make arrangements for the deceased, if time off is needed. Leave must be taken within 30 days of death. In the rare instances where this criterion may not be applicable due to an extended delay in the holding of services, intermittent leave may be granted, but will not exceed allotted benefit.

The Department Director may approve additional leave or leave due to the death of a non-immediate family member. This time off would require the use of PTO or unpaid if PTO is exhausted.

EXTENDED SICK LEAVE BANK (ELSB)

ESLB hours can be used for time off due to illness or injury to the employee. The provisions for using ESLB hours are as follows:

- The employee must exhaust all PTO hours before accessing the ESLB.
- ESLB hours can be used to supplement the pay difference of short- and long-term disability insurance at the employee's request and only up to the employee's regular wages.
- ESLB hours are not transferable, cannot be converted to cash and are not subject to the sell back option.
- ESLB hours are not payable to the employee at termination.

HOLIDAY PAY

The City observes the following as official paid holidays:

- New Year's Day
- Martin Luther King Jr. Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Day After Thanksgiving
- Christmas Eve
- Christmas Day
- City Floating Holiday (determined by City Administrator)
- Employee Floating Holiday

If the holiday falls on a Saturday, then non-shift City employees will observe the holiday on the preceding Friday. If the holiday falls on a Sunday, then non-shift City employees will observe the holiday on the following Monday. Note that shift City employees experience the holiday on the actual calendar day on which the holiday falls.

All regular, full-time and part-time employees are eligible for the 11 official paid holidays. For each official paid holiday, the benefits are as follows:

- Full-time exempt, Police and E911 employees receive an 8-hour benefit.

- Full-time non-exempt employees (except Fire sworn personnel) receive a 7.5-hour benefit for Holidays that fall on Monday through Thursday and a 7-hour benefit for Holidays falling on a Friday.

- Part-time employees (defined as working an average of 20 or more hours per week) receive a 4-hour benefit.

- Fire sworn personnel receive 12-hour benefit.

This benefit is paid whether or not the employee works on the holiday and is paid at the employee's regular hourly rate of pay, which is herein defined as the employee's regular holiday pay. For

purposes of calculating overtime only, this benefit is considered hours worked, except as applied to employees of the Police or Fire ~~Public Safety~~ Department who works a shift schedule. If you are a full-time employee working a departmentally approved flexible schedule you may need to rearrange your work hours to earn a complete full workweek.
Part-time, seasonal, and temporary employees not scheduled to work, will not be paid for the official holiday.

For work required on an official paid holiday, excluding the employee's elective floating holiday:

- A non-exempt employee who is required to work on an official paid holiday (not necessarily the day the holiday is observed by the City) shall receive pay at 1.5 times the employee's regular hourly rate.
- An exempt employee, other than an exempt employee of the Police and Fire ~~Public Safety~~ Department who works a shift schedule, who is required to work on an official paid holiday shall be given alternative time off equal to the employee's regular holiday benefit. This alternative time off should be taken within the same pay period as the official paid holiday. An exempt employee of the Police and Fire ~~Public Safety~~ Department who works a shift schedule will receive their regular rate of pay for hours worked on the holiday.
- Part time, seasonal and temporary employees scheduled to work an official paid holiday will be paid the hours worked at 1.5 times their regular rate.

Any employee who is absent without the City's written approval on the scheduled workday before or after the holiday becomes ineligible for holiday pay. If a holiday falls during your vacation, you may arrange with your supervisor to take an alternate day off or receive pay for the holiday.

Employee Floating Holiday:
Employees may select this holiday with the preapproval of immediate supervisor. Employee floating holiday accrues upon hire and each year on January 1 and must be taken as a full holiday benefit using continuous hours. It may not be accumulated or carried forward from year to year. It must be used during the calendar year January 1, through December 31.

In special circumstances, the Director of HR may approve an additional Employee Floating Holiday as an incentive for employees who successfully complete City-sponsored professional development programs.

Employees may accrue a maximum of three (3) floating holidays within a calendar year.

Observance of Religious Holidays:
Reasonable effort will be made to accommodate an employee's request for time off on a recognized religious holiday not observed by City policy. Employees shall use accrued PTO or floating holiday. Unpaid time off will only be approved if PTO and floating holiday is exhausted. Requests to observe a religious holiday shall be made to the employee's immediate supervisor at least 2 weeks in advance.

PARENTAL LEAVE

Upon birth of the child, short-term disability benefits are provided to the birthmother. Currently, short-term disability benefits provide 67% of employee's regular rate of pay, beginning the 15th day of disability and continuing for 4 weeks (6 weeks if C-section). The short-term disability insurance premium is paid 100% by the City.

In addition to the short-term disability benefits, employees that are eligible for FMLA, will also receive 2 weeks of paid parental leave.

- **Birthmothers:** receive 2 weeks of paid parental leave following birth of the child, thus, supplementing the short-term disability benefit waiting period.
- **Spouse:** receive 2 weeks of paid parental leave following birth of the child.
- **Adoption/Foster Care**: parents receive 2 weeks of paid parental leave following adoption of child or foster care placement.

Paid Parental Leave for spouse and adoption, must be taken within 12 months of birth or adoption of child, and at a minimum of one full workday/shift increment.

If both parents are employed by the City, each parent is entitled to receive the full parental leave benefit individually; the benefit is not combined or shared.

Upon approval of FMLA leave, the following will be loaded in the employee's Parental Leave accrual bank:

Part-time non-exempt	up to 10 days of regular scheduled hours
Full-time non-exempt	74 hours
Full-time exempt and Police sworn	80 hours
Fire Division sworn personnel	106 hours

PAID TIME OFF (PTO)

The City provides employees with PTO from the routine of their regular job for rest, recreation, personal needs, illness, and/or medical treatment. PTO is intended to help employees maintain their personal outlook on life and work that will benefit them in their work and relationship with the City. The amount of PTO provided will be based on the employees scheduled base hours worked and length of service with the City.

PTO Request/Approval: PTO can be used for any purpose, subject to necessary request and approval procedures (see Leave Request Form). PTO can be used in minimum 30-minute increments. For Fire Sworn personnel, the minimum increment is four (4) hours. PTO will be used to supplement

the pay difference of short- and long-term disability payments and workers' compensation, only up to the employee's scheduled base wages. Requests for PTO, other than unexpected illness or injury, shall be approved at least one week in advance. Use of PTO time will be subject to approval by the Department Director or immediate supervisor. Employees who are on flex schedules will need to adjust PTO requests accordingly, since schedules may vary throughout the year. Approval shall be governed by the needs of the City, with due regard to the employee's request.

NOTE: If an exempt employee works fewer than 4 hours of a full scheduled workday, the City will deduct the equivalent of the hours not worked from the exempt employee's available PTO balance.

Documentation: In case of absence due to illness or injury, the employee shall notify his or her supervisor at least one hour prior to the employee's scheduled arrival. For any absence attributed to illness or a doctor's visit, the employee may be required to submit written evidence from an attending physician directly to the Human Resources department prior to returning to work indicating that the employee was seen by a health care provider and is released to return to work.

Eligibility: All regular, full-time employees, and all regular part-time employees defined as working 20 or more hours per week are eligible for PTO. For administrative purposes, accruals may occur per pay period as defined by Finance Department. Accrual rates are as follows:

FULL-TIME NON-EXEMPT – 37 HRS/WEEK – 1924 HRS/ANNUAL

Years of Service	Bi-Weekly Accrual Rates (hrs.)	Annual Amount (hrs.)	Annual Amount (days)
0.0 - 1.0 years	3.4154	88.8	12
1.1 - 5.0 years	5.1231	133.2	18
5.1 - 10.0 years	6.8308	177.6	24
10.1 + years	7.6615	199.2	27

FULL-TIME EXEMPT AND NON-EXEMPT – 40 HRS/WEEK – 2080 HRS/ANNUAL

Years of Service	Bi-Weekly Accrual Rates (hrs.)	Annual Amount (hrs.)	Annual Amount (days)
0.0 - 1.0 years	3.6923	96	12
1.1 - 5.0 years	5.5385	144	18
5.1 - 10.0 years	7.3846	192	24
10.1 + years	8.3077	216	27

PART-TIME EMPLOYEES – 1040 HRS/ANNUAL

Years of Service	Bi-Weekly Accrual Rates (hrs.)	Annual Amount (hrs.)	Annual Amount (days)
0.0 - 1.0 years	1.8462	48	12
1.1 - 5.0 years	2.7692	72	18

5.1 - 10.0 years	3.6923	96	24
10.1 + years	4.1538	108	27

FIRE SWORN PERSONNEL – 56 HRS/WEEK – 2756 HRS/ANNUAL

Years of Service	Bi-Weekly Accrual Rates (hrs.)	Annual Amount (hrs.)	Annual Amount (days)
0.0 - 1.0 years	4.8923	127.2	12
1.1 - 5.0 years	7.3385	190.8	18
5.1 - 10.0 years	9.7846	254.4	24
10.1 + years	10.9846	285.6	27

When an employee moves into the next accrual level, the new accrual rate begins in the pay period the date of eligibility changes. PTO time will not accrue during leaves of absence, except for approved military leave of absence, workers' compensation absence and approved FMLA leave.

NOTE: For internal control purposes, employees who hold positions in Finance, Information Technology, or in other departments where they may have any financial responsibilities (i.e. accounts payable generation, cash receipting, etc.), will be required to take a minimum of 5 consecutive days off per year. In addition, an alternate employee must be cross trained and perform the functions of the position during the absence of the vacationing employee.

Maximum PTO Accrual:

- Full-time employees: ~~240~~ 256 hours.
- Part-time employees (working 20 hours or more per week): ~~120~~ 128 hours.
- Fire sworn personnel: ~~318~~ 342 hours.

At the end of each calendar year, any unused PTO hours over the maximum accrual will be transferred to the employee's Extended Sick Leave Bank (ESLB). Hours in the ESLB are not transferable. Please reference the section on "*Donation of PTO*" for special rules on maximum PTO accrual.

PTO Separation Payment: PTO balances cannot be used to extend the date of separation beyond the last day scheduled to work or instead of notice. Upon end of employment, employees are entitled to payment of unused PTO hours up to a maximum of ~~240~~ 256 hours, excluding any PTO hours that may have been donated to the employee. Fire shift employees are entitled to payment of unused PTO hours up to a maximum of ~~318~~ 342 hours. This PTO payment will be based on the employee's regular rate of pay at the time of separation. Payment of unused PTO hours will be included in the employee's last regular paycheck.

PTO Upon Hire: See *Hiring & Selection.*

Unpaid Time Off: Unpaid time off will only be approved if all other forms of PTO are exhausted. See "*General Leave of Absence*" policy.

PTO CONVERSION OPTION (SELL BACK DAYS)

In November of each year, full-time employees who have completed their introductory period, may cash out a certain number of PTO hours, as long as the remaining PTO balance is equal or greater than, one week of paid time off. Maximum sell back hours are as follows:

Years of Service	Regular Full Time Maximum Cash Out	Fire Sworn Shift Employees Maximum Cash Out
0 to 1 year	0 hours	0 hours
1 to 5 years	16 hours	24 hours
More than 5 years	32 hours	48 hours

The conversion value will be based on the employee's regular rate of pay as of the pay period of conversion.

PTO DONATION PROGRAM

Full time employees may donate accrued PTO hours to another full-time employee's PTO account. PTO hours donated will be converted hour-per-hour, regardless of the donor or donee's rate of pay. Donations are limited to "serious health conditions" involving a full-time employee or the employee's spouse, dependent parent, and/or children under the age of 18 who live at home, and may be granted to a qualified employee only once in any 12-month rolling period. For the purposes of this policy, "serious health condition" is the same as defined by FMLA regulations.

The Director of HR is responsible for considering/approving PTO Donation Requests. The Finance Department - Benefits Division shall manage the donated PTO process, including any refund of donated PTO time according to payroll procedures. PTO Donation will be authorized only after it is determined employee eligibility for FMLA and/or Extended Leave of Absence.

PTO hours donated to an employee are not subject to the maximum annual accrual policy. Donated PTO hours in excess of the employee's annual maximum accrual will not be transferred to the employee's extended sick leave bank but rather will be carried over to the next calendar year.

At the conclusion of the eligible leave period (upon employee return to work or end of employment relationship, whichever comes first), any donated PTO remaining will be refunded on a pro rata share basis to those employees who provided donations.

PAYROLL

PAYDAY & PAY PERIODS

Employees are paid every other week for a total of 26 pay periods a year. Pay periods begin on Saturday and end on Friday in the two-week period. Non-exempt employees shall be paid on an hourly basis for the number of hours actually worked during the two-week period. The payday will normally fall on a Friday. However, paychecks may be received earlier if a payday coincides with the observance of a holiday.

The City takes all reasonable steps to ensure that employees receive the correct amount of pay in each paycheck that employees are paid on the scheduled payday and improper deductions are not taken, and improper additional pay are not paid. Employees who believe their pay has been improperly deducted, or receiving more pay that they are entitled, should report such improper deduction to the Finance Department - Payroll. The complaint will be promptly investigated, and the results of the findings will be reported to the complaining employee. The employee may appeal the decision to the Director of HR if unsatisfied with the findings of the investigation. Any employee whose pay is improperly deducted shall be reimbursed for such no later than the next pay period after the improper deduction is communicated to the Finance – Payroll Division. Any employee receiving pay in excess of their entitlement is required to reimburse the City for the overpayment.

Department of Labor views employee overpayment as a "loan or advance of wages", and the Federal Fair Labor Standards Act (FLSA) and Department of Labor (DOL) give employers the right to recover an overpayment in full. Finance Department – Payroll Division will work with the employee on a repayment plan that is reasonable for both the City and the employee.

PAY DEDUCTIONS & GARNISHMENTS

The law requires that the City make certain deductions from an employee's compensation. Among these are applicable federal, state, local income taxes, and state-mandated pension contributions. The City offers programs and benefits beyond those required by law. Eligible employees may also voluntarily authorize deductions from their paychecks to cover the cost of participation in these programs (insurance premiums, 457, flexible spending accounts, Pre-Paid Legal, AFLAC, voluntary life, etc.). Other payroll deductions shall be allowed only upon approval by the Finance Director.

The City may also make deductions from an employee's final paycheck at separation to compensate for the value of equipment and/or materials issued to the employee but not returned and/or for certain benefits provided through the Tuition Reimbursement Program. For exempt employees, the City does not make deductions for the quality or quantity of work except as allowed by law.

Employee earnings are subject to legal processes that lead to the reduction of pay. These legal processes (levy, garnishment, order, attachment, etc.) require the City to withhold money from the

employee's pay and to submit those funds to a third party. Each legal process must be handled just as the law directs. If an employee owes a debt directly to the City, the employee and the City may enter into a non-court ordered agreement to repay the City through payroll deduction. Questions concerning why deductions were made and calculated should be directed to the Finance Department.

If you believe that a deduction has been made to your pay in error, promptly notify the Finance Department - Payroll. The City will investigate your pay and deductions. The City will not penalize an employee for reporting a suspected error and we will reimburse an employee for any improper deduction.

PAYROLL ADMINISTRATION

All employees must participate in the Automatic Payroll Direct Deposit Program. Pay will be deposited on a bi-weekly pay cycle. City employees will be paid according to established schedules. When a scheduled payday falls on a holiday or weekend, employees shall be paid on the immediate preceding weekday. Pay for reimbursement and recognition purposes will be processed through the Finance Department - Payroll and included in the employee's scheduled pay.

No advance pay provisions will be made for employees at any time. Employees receiving retroactive pay will be paid the following scheduled pay period.

At separation, an employee's final paycheck will be issued via direct deposit.

TIMEKEEPING

Employees are ultimately responsible for recording and attesting to their actual time worked (account for hours worked, and benefit time used). Altering, falsifying, and/or tampering with time records is prohibited and will result in immediate termination. This prohibition also includes knowingly receiving compensation for incorrect or inaccurately documented time. The procedures for recording and attesting to your time worked will depend upon your job classification.

Non-exempt employees are required to record on their timesheets, their actual hours worked and unpaid meal break. Non-exempt employees are required to report in uniform, if applicable, and ready to work at the beginning of their shift. Upon completion of their shift, employees should conclude their duties for the day and note their hours worked prior to departing City premises.

If you are asked to travel for any City business, the Finance Department - Payroll will provide you with instructions for recording your travel time so that you are properly paid.

Non-exempt employees must obtain authorization from their supervisor prior to working outside assigned work hours, including accessing technology, responding to communications, placing

phone calls, or other actions related to an employee's assigned work duties. Non-exempt employees are not allowed to work "off the clock" under any circumstances.

Non-exempt employees performing, not previously authorized, work outside of assigned work hours, could result in disciplinary action up to and including termination. All time worked by non-exempt employees must be recorded on the employee's timesheet. The timesheet must be signed by the employee and approved by the Department Director or their designee.
Exempt employees are required to record the hours during normal work schedule where work was not performed (i.e. PTO).

The manner in which employees record work hours will be provided by the Finance Department - Payroll.

If you have any questions about what should be included or excluded from your time record, please contact HR or Finance Department – Payroll Division.

RETIREMENT

DEFINED BENEFIT PENSION PLAN

Eligible employees hired prior to July 1, 2009, can participate in one of two Defined Benefit Plans. An employee is fully vested after completion of five years of continuous service. The City of Alpharetta Defined Benefit Pension Plan provides for a monthly benefit to eligible participants for life after retirement at no cost to the employee. This plan was closed to employees hired after February 29, 2008.

The City of Alpharetta Enhanced Defined Benefit Pension Plan provides for a monthly benefit to eligible participants for life after retirement at an employee cost of 2.5% of pay. Eligible participants are:

1. those who either made an irrevocable election to participate in this plan or,

2. were eligible and hired after February 29, 2008, and before July 1, 2009. This plan was closed to new entrants effective June 30, 2009.

The City's Defined Benefit Plans have been closed to new hires effective July 1, 2009. These plans provide benefits to eligible full-time regular employees and limited eligible part-time employees hired prior to July 1, 2009. An eligible employee is fully vested after completion of five years of continuous service. The City of Alpharetta Defined Benefit Pension Plans provide for a monthly benefit to eligible participants for life after retirement.

DEFINED CONTRIBUTION RETIREMENT PLAN (401a)

Employer Contributions - Effective July 1, 2009, all eligible new hires (regular full-time employees) will be automatically enrolled in a 401 (a) Defined Contribution Plan, also known as The City of Alpharetta Retirement Savings Plan. The City will contribute 10% of the eligible employee's compensation to an individual 401(a) account (Employer Contributions Account). An employee accrues a vested benefit at 20% a year, with full vesting after 5 years of continuous service.

Matching Contributions – Full-time employees will be eligible to participate in City funded Matching Contributions on the first day of payroll after completion of one year of service (three years for regular part time employees). The City will match the 457 salary deferrals (see benefit below) that an eligible employee makes, in an amount equal to 100% of the deferrals up to 5% of the employee's compensation. The employee is 100% vested immediately in the amount in their 401(a)-matching account.

DEFERRED COMPENSATION PLAN (457 PLAN)

The 457 program is offered through a third-party administrator and serves to supplement your retirement plan. An employee may join at any time. The employee selects the amount to be deducted on a pretax basis into their account. After one year of employment (three years for regular part time employees), the City will match employee contributions up to 5% of the employee's total earnings as noted above under Matching Contributions of the 401a plan. The City matching funds will be placed into the employee 401a plan.

An annual IRS dollar limit applies to all employee and employer contributions. This limit is indexed annually by the IRS. For more information, please see the Retirement Savings Plan Summary Plan Description available on the intranet or from the Finance Department – Benefits Division.

RETIREE REIMBURSEMENT BENEFIT

Full-time employees who terminate employment with a minimum of 15 years of service and reach the age of 55 will be eligible to receive a monthly health reimbursement benefit as periodically determined by the Pension Board of Trustees. The monthly benefit is available to the participant to cover eligible medical expenses (of the participant or the participant's spouse or dependent) as defined under Section 213(d) of the IRS Code. The City funds this benefit at an amount equal to 2% of employees' annual regular wages.

SUPPLEMENTAL RETIREMENT PLAN

As certified professionals serving in the capacities of Police Officers, 911 Communications Officers, and Firefighters within the State of Georgia, sworn members of the Police and Fire Department are eligible to enroll in supplemental retirement plans provided by both the Peace Officers' Annuity and Benefit Fund (POAB) and the Georgia Firefighters' Pension Fund (GFPF). Effective January 3, 2023, the City will fund the necessary contributions to provide eligible employees' annual membership in such funds.

OTHER BENEFITS

EMPLOYEE ASSISTANCE PROGRAM (EAP)

The EAP is a counseling and referral service available to employees to aid them in dealing with the range of problems which might have an impact on their working as well as their personal lives. As a self-referral and management tool, the EAP is intended to increase employee productivity, reduce absenteeism and turnover, and positively impact the learning and work environment. The program reflects the City's concern for the well-being of our employee's as well as our dedication to the effective accomplishment of organization goals and efficiencies.

The EAP provides confidential short-term intervention, assessment, and referral services for employees. Any employee or family member who seeks assistance from the EAP is assured of confidentiality. Employees, at their discretion, may grant permission in writing for information to be released by the EAP to certain individuals, which may be revoked or modified at any time. Any information concerning assessment, treatment or referrals is strictly confidential and kept in accordance with regulations governing medical records and personal information. The only exceptions to the above are situations in which the EAP counselor believes the client is a danger to themselves or others, there is suspected child or elder abuse, or when ordered by the courts to release information.

Employees may self-refer to the EAP, or a referral may be made by a supervisor as an informal recommendation or as a mandatory requirement.

ELIGIBILITY:

The EAP services are free to all employees and their immediate household, (spouse or civil union partner, dependents, and anyone who is a permanent resident of an employee's household including civil union partners and their dependents) and is available to provide assistance with work or personal concerns.

The EAP is part of the benefits program provided by the City, which contracts with a provider of mental health and behavioral management services. The contract provides employees with several free counseling sessions with a mental health professional certified by the approved EAP contractor; the cost of additional services, beyond the specified number of free sessions, is the responsibility of the employee.

EAP AND DISCIPLINARY ACTION:

Department Directors, managers, and supervisors have an affirmative duty to deal appropriately with employee performance, conduct deficiencies, risk assessment and fitness for duty issues, and to utilize the disciplinary process when necessary and appropriate. Appropriate disciplinary policy and procedure shall be applied, if necessary, to encourage acceptable levels of job performance

and personal conduct even if the employee is an active participant in EAP. Participation in EAP does not necessarily shield an employee from further disciplinary action up to and including dismissal if unacceptable job performance or personal conduct persists or warrants immediate dismissal. Referral to the EAP shall not be considered a substitute for nor a formal step in any disciplinary action imposed for commission of an offense or to otherwise address performance or productivity issues.

PROCEDURES:

A. Employee Self-Referral
Employees who elect to use the EAP at their own initiative may contact the EAP directly. An EAP counselor will work with the employee confidentially to provide services and resources to help employees in their everyday working and family lives. The EAP professional may refer additional resources which are beyond the scope of the EAP. No aspect of the referral or treatment is shared with the City unless authorized by the employee.

B. Supervisory Recommendation
A supervisory recommendation can be made when a member of management becomes aware of patterns of behavior that are out of the norm for a given employee and which may indicate heightened stress, anxiety, depression, etc. that are beginning to have an impact on performance and/or productivity. It is not the supervisor's job to attempt to make a diagnosis, rather, to provide a reminder of the availability of the EAP and encouragement to take advantage of the services may be appropriate.

Supervisors are encouraged to consult in advance with the Director of HR on appropriate ways to approach the conversation and address the issue with the employee.

A supervisory recommendation is an encouragement for the employee to utilize all available means to correct work performance, but the final decision to use the services of the EAP remains with the employee. No aspect of the informal referral or treatment is shared with the City unless authorized by the employee.

C. Supervisory Mandatory Referral
In cases of deteriorating job performance or unacceptable personal conduct, a referral to the EAP may be a condition of continued employment. A supervisor considering a mandatory EAP referral must first consult with the Director of HR to determine an appropriate course of action.

The EAP is a resource for resolving the underlying factors which may result in some on-the-job problems; it is not a formal step in the disciplinary process. In the event that an employee's job performance or productivity continues to decline, the supervisor has the full range of discipline available. Progressive discipline may always be considered in addition to an EAP referral for an employee with performance or conduct difficulties.

Information on the reason for the referral, documented performance and/or behavioral concerns, current and prior disciplinary action(s), and appropriate background information will be provided to the EAP using the proper forms.

The employee will be asked to sign a HIPAA-compliant form authorizing the use or disclosure of personal health information so that the counselor can communicate back to the City whether the employee is in compliance or not in compliance with the terms of the mandatory referral and the subsequent treatment plan outlined for the employee, and whether recommended treatment will interfere with reporting to work. That information is retained by HR in a file separate from the employee's personnel file. Absolutely *no* private information discussed in the actual counseling sessions will be shared with the City unless the employee expressly indicates on the HIPAA release form his or her permission for the counselor (or any staff member) to do so, or unless the employee makes a threat to harm a person at or property of the City.

The specific reason for the referral shall be conveyed to the employee. The employee must also be informed that refusal to accept the referral and comply with any subsequent recommendations made by the EAP mental health provider will result in application of disciplinary policies and procedures, up to and including dismissal.

D. Fitness for Duty / Risk Evaluation

The Fitness-for-Duty/Risk Evaluation is a means to address certain situations where an employee may pose a hazard or risk to self or others in the workplace. It may also be used to determine an employee's physical or psychological fitness to perform their essential job functions. The EAP will facilitate the evaluation and consult with medical or psychological professionals to determine an appropriate course of action.

This type of referral may be considered when an employee:

- Is unable to perform essential duties of the job, or
- Displays behavior that may pose a hazard or risk to themselves or others, or
- Exhibits emotional or psychological behavior that has the potential to endanger the safety and security of persons or property, or
- Creates serious disruption in the workplace, or
- Has been directly involved in certain critical workplace incidents that resulted in a death or major traumatic injury.

A fitness-for-duty evaluation must be approved in advance by the Director of HR.

If the situation is critical, dangerous, or so severe that immediate action is necessary, the supervisor must immediately contact HR, or the Police Chief~~Director of Public Safety~~. Where circumstances warrant, and an immediate threat to life or bodily injury is perceived, 911 should immediately be called and HR advised immediately thereafter or once the threat has been contained by emergency responders.

The employee shall be informed of the specific reasons for the required evaluation, expectations for compliance in resolving the concern(s), and the consequences for failure to undergo the evaluation, failure to comply with recommendations or conditions of the evaluation, or failure

to make the required improvements in performance or conduct. Disciplinary action up to and including dismissal may be taken for such failures.

In the case of a Fitness for Duty / Risk Evaluation, the cost of the evaluation shall be the responsibility of the City, and the City is considered the client. The evaluative summary is provided to the City. The report shall be retained as part of the employee's medical records files by Human Resources, not as part of the employee's personnel file. The cost associated with treatment recommended as a result of the Fitness for Duty / Risk Evaluation shall be the employee's responsibility.

TIME OFF:

The City considers normally scheduled work hours spent conferring voluntarily with an EAP counselor as personal leave and the time away from work shall be charged against the employee's available PTO balance. Should an employee be referred by the EAP for extended service beyond EAP counseling, working hours spent away from work shall also be handled as personal leave.

In the event of a Mandatory Referral or a Fitness For Duty/Risk Evaluation, normally scheduled work hours spent with an EAP counselor for the initial assessment or with the assigned mental health provider for the purpose of completing the Fitness For Duty/Risk Evaluation shall be considered administrative leave with pay and the employee compensated at standard rate of pay. This paid leave time shall not count as hours worked for purposes of overtime calculation.

Should an employee be referred by the EAP for extended service beyond the initial assessment or evaluation, working hours spent away from work shall be handled as personal leave. These hours will be deducted from the employee's available PTO balance. If the PTO balance or other leave options are exhausted, the time away will be treated as leave without pay.

EMPLOYEE RECOGNITION

The contributions employees make daily while doing their job are important to the City's mission to deliver high quality municipal services to the community. In recognition of the continued employee contributions and dedication to the City and the community, the City offers the following appreciation for full-time and part-time employees.

Service Appreciation: The City will recognize employees in five-year increments. Employees with 5, 10, 15, 20, 25, 30, etc. years of service will be presented with a service pin, certificate of appreciation, and service appreciation award (via direct deposit) reflecting their years of service.

Employees separating from the City in good standing with ten or more years of service may be recognized during a recognition event that may be attended by all current employees. The event will be the responsibility of the employee's department and will be funded by the department's budget.

Special Recognition: Special recognition of employees for outstanding community or professional achievements will be recognized with a certificate of appreciation to be presented at a City Council meeting. Such recognition will be considered on an individual basis and requires the prior approval of the City Administrator.

Retirement Appreciation: The City recognizes employees at the time of their retirement for their dedicated years of service to the community. The Department Director or their designee will coordinate and schedule the recognition event for the retiring employee.

GEORGIA COLLEGE SAVINGS PLAN (529 PLAN)

An employee can set up a tax-deferred account to save for college education expenses for their children through the Path2College 529 Plan. Path2College is a state-sponsored, tax-advantaged 529 college savings plan that helps families and individuals plan for the cost of higher education. Contributions are tax deductible on state income tax. Withdrawals for qualified expenses are free of federal and state income tax.

RECREATION, PARKS & CULTURAL SERVICES ACTIVITIES

Regular part-time and full-time employees are eligible to participate in certain recreation programs at a reduced rate. Please refer to the Recreation, Parks & Cultural Services Employee Activity policy for more details about the program.

TUITION REIMBURSEMENT PROGRAM

The tuition reimbursement program is available to all regular full-time and part-time employees pursuing a job related undergraduate or graduate degree. To be eligible for reimbursement, employees must have:

- completed (new hire) introductory period,
- received a cumulative average score of meets expectations or higher on their most recent performance evaluation,
- be enrolled in a course that is required in order to obtain an undergraduate or graduate degree, and
- be enrolled at an accredited state or private college/university.

Approved degree programs must be directly related to the employee's current position or prospective job duties.

Any employee who accepts **undergraduate** tuition reimbursement does so with the understanding that they assume a responsibility of **one year** of service from the date of the reimbursement. In the event the employee voluntarily terminates prior to the completion of the required one year of post reimbursement service, the total amount of reimbursements paid to the employee in the preceding 12 months becomes due and payable from the employees final paycheck, or other arrangements may be made to repay the City prior to termination of employment.

Any employee who accepts **graduate** tuition reimbursement does so with the understanding that they assume a responsibility of **two years** of service from the date of the reimbursement. In the event the employee voluntarily terminates prior to the completion of the required two years of post-reimbursement service, the total amount of reimbursements paid to the employee in the preceding 24 months becomes due and payable from the employees final paycheck or other arrangements may be made to repay the City prior to termination of employment.

Request / Approval:
An employee must submit a completed Tuition Reimbursement Program **Enrollment Form**, located in the City Intranet, with all necessary information for final approval from the HR Department prior to the start of the course.

For both undergraduate and graduate programs, only courses taken at an accredited state or private college/university creditable towards an approved degree program will be eligible for reimbursement.

Reimbursement:
Within 30 days of the end of the semester, the employee must submit to HR, Tuition Reimbursement **Request Form** along with proof of satisfactory course completion and proof of payment or approved deferred payment for tuition prior to receiving reimbursement.

Reimbursement will be based on course grade as follows:

A = 100% reimbursed
B = 75% reimbursed
C = 50% reimbursed

Certificate program based on a pass/fail basis = 75% reimbursed

Certificate programs: These are structured programs offered by colleges, universities, or other accredited education provider that lead to a formal diploma or certificate upon completion. They often involve multiple courses or modules and may require a set curriculum. For example, a General Educational Development (GED) might include several classes over several weeks or months.

The maximum schedule for reimbursement per semester is set annually in accordance with tuition charged by the Georgia State University, not to exceed the following amounts for undergraduate or graduate program for which the employee is enrolled:

<table>
<tr><td></td><td colspan="3">Undergraduate or Graduate Degree
Allowance per semester</td></tr>
<tr><td rowspan="2">Full-Time Employees</td><td>Spring
6 credit hours</td><td>Summer
3 credit hours</td><td>Fall
6 credit hours</td></tr>
<tr><td colspan="3">Up to 15 credit hours per budget year.</td></tr>
<tr><td rowspan="2">Part-Time Employees</td><td colspan="2">Spring
3 credit hours</td><td>Fall
3 credit hours</td></tr>
<tr><td colspan="3">Up to 6 credit hours per budget year.</td></tr>
</table>

The program covers the cost of tuition only. Actual invoice with cost breakdown and documentation of the final grade must be attached to the Tuition Reimbursement Request Form. Administrative fees, lab fees, cost of books, etc. are not eligible for reimbursement.

The acceptance of reimbursement by the employee acknowledges that they have not received payment from any other financial assistance program. If other financial assistance is available to the employee, the City will reimburse only the remaining eligible expense. Tuition reimbursement may be considered compensable income and taxable according to IRS regulations - Section 127.

The tuition reimbursement program does not include special seminars, conferences, workshops, webinars, skills-based training, professional development courses, ~~certificate programs~~certification courses, or continuing education courses. These non-degree educational opportunities are approved on a departmental basis with budgeted funds. Note on certification courses: These are usually single courses or training sessions designed to prepare employees to earn professional certification from an external organization. The focus is on meeting the requirements to become certified in a specific skill or profession.

Employees are encouraged to schedule classes during non-regular work hours. Attendance at a class during regular work hours requires the prior approval of the Department Director and Director of HR.

HR will budget funds each year for the tuition reimbursement program. The amount funded for this program is contingent upon approval of the fiscal year budget. Course Request Forms are approved based on available funds and timing of submission to HR. The City Administrator has authority to reduce the amount of funds available during a fiscal year for this program if necessary or impose other requirements or conditions for receiving this benefit.

The City has the right to change its employee benefits at any time and without advance notice. The City provides covered employees with Summary Plan Description booklets and other materials relating to benefits and medical plans. In the event of a conflict, the insurance contract or plan documents will prevail over other documents. Assistance or additional information regarding these programs can be obtained from the Finance Department – Benefits Division.

APPENDIX

APPENDIX A – ACKNOWLEDGEMENT OF RECEIPT

I acknowledge that I have received access to the City of Alpharetta ("City") Employee Handbook and Benefits Manual, either in physical copy or through electronic access. I understand that it is my responsibility to read and familiarize myself with the policies, procedures, and expectations outlined in the handbook.

I understand that this Handbook represents only current policies and benefits and that it does not create a contract of employment or any property rights. The City retains the right to change these policies and benefits at any time, without advance notice, as it deems appropriate.

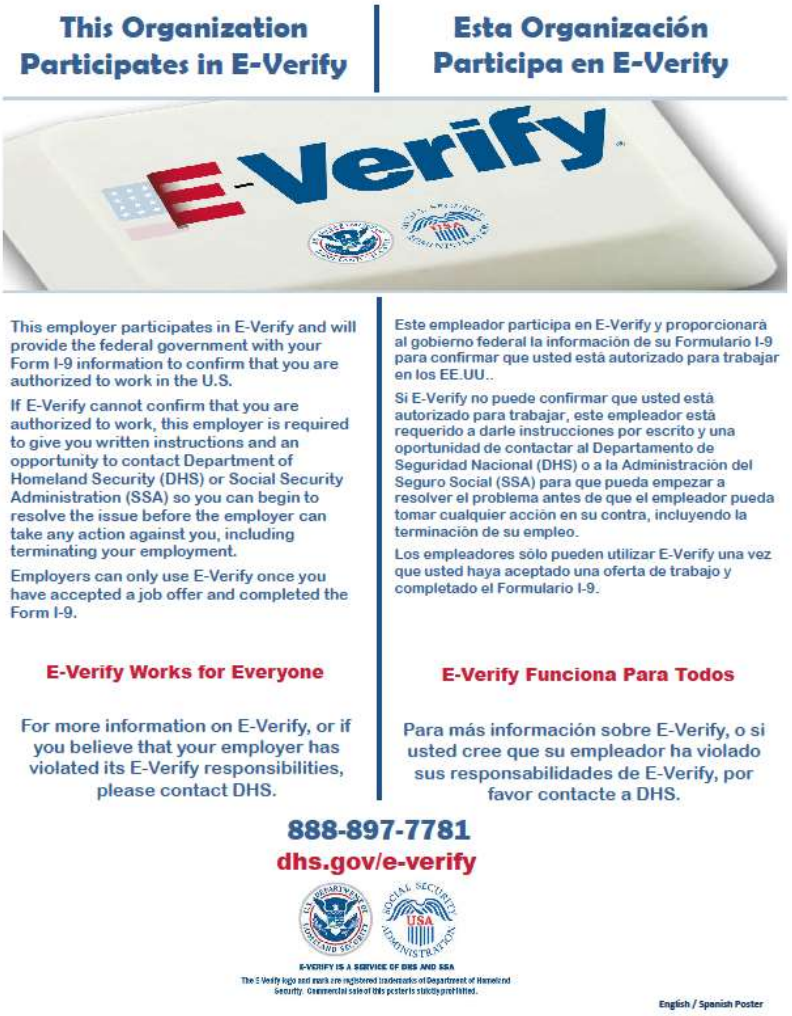
I also acknowledge that my employment with the City of Alpharetta is "at-will," meaning that either I or the City may terminate the employment relationship at any time, with or without cause or notice. I understand that this at-will employment relationship cannot be changed by any statement, document, or conduct, except in a written agreement signed by the City Administrator.

I further acknowledge that I am responsible for adhering to all policies and updates provided by the City, as well as for seeking clarification on any policy or procedure I do not fully understand.

_____	_____
Signature	Job Title
_____	_____
Printed Name	Date

c. Employee Personnel File

APPENDIX B – E-VERIFY



EMPLOYEE RIGHTS
UNDER THE FAMILY AND MEDICAL LEAVE ACT

THE UNITED STATES DEPARTMENT OF LABOR WAGE AND HOUR DIVISION



LEAVE ENTITLEMENTS

Eligible employees who work for a covered employer can take up to 12 weeks of unpaid, job-protected leave in a 12-month period for the following reasons:

- The birth of a child or placement of a child for adoption or foster care;
- To bond with a child (leave must be taken within one year of the child's birth or placement);
- To care for the employee's spouse, child, or parent who has a qualifying serious health condition;
- For the employee's own qualifying serious health condition that makes the employee unable to perform the employee's job;
- For qualifying exigencies related to the foreign deployment of a military member who is the employee's spouse, child, or parent.

An eligible employee who is a covered servicemember's spouse, child, parent, or next of kin may also take up to 26 weeks of FMLA leave in a single 12-month period to care for the servicemember with a serious injury or illness.

An employee does not need to use leave in one block. When it is medically necessary or otherwise permitted, employees may take leave intermittently or on a reduced schedule.

Employees may choose, or an employer may require, use of accrued paid leave while taking FMLA leave. If an employee substitutes accrued paid leave for FMLA leave, the employee must comply with the employer's normal paid leave policies.

BENEFITS & PROTECTIONS

While employees are on FMLA leave, employers must continue health insurance coverage as if the employees were not on leave.

Upon return from FMLA leave, most employees must be restored to the same job or one nearly identical to it with equivalent pay, benefits, and other employment terms and conditions.

An employer may not interfere with an individual's FMLA rights or retaliate against someone for using or trying to use FMLA leave, opposing any practice made unlawful by the FMLA, or being involved in any proceeding under or related to the FMLA.

ELIGIBILITY REQUIREMENTS

An employee who works for a covered employer must meet three criteria in order to be eligible for FMLA leave. The employee must:

- Have worked for the employer for at least 12 months;
- Have at least 1,250 hours of service in the 12 months before taking leave;* and
- Work at a location where the employer has at least 50 employees within 75 miles of the employee's worksite.

*Special "hours of service" requirements apply to airline flight crew employees.

REQUESTING LEAVE

Generally, employees must give 30-days' advance notice of the need for FMLA leave. If it is not possible to give 30-days' notice, an employee must notify the employer as soon as possible and, generally, follow the employer's usual procedures.

Employees do not have to share a medical diagnosis, but must provide enough information to the employer so it can determine if the leave qualifies for FMLA protection. Sufficient information could include informing an employer that the employee is or will be unable to perform his or her job functions, that a family member cannot perform daily activities, or that hospitalization or continuing medical treatment is necessary. Employees must inform the employer if the need for leave is for a reason for which FMLA leave was previously taken or certified.

Employers can require a certification or periodic recertification supporting the need for leave. If the employer determines that the certification is incomplete, it must provide a written notice indicating what additional information is required.

EMPLOYER RESPONSIBILITIES

Once an employer becomes aware that an employee's need for leave is for a reason that may qualify under the FMLA, the employer must notify the employee if he or she is eligible for FMLA leave and, if eligible, must also provide a notice of rights and responsibilities under the FMLA. If the employee is not eligible, the employer must provide a reason for ineligibility.

Employers must notify its employees if leave will be designated as FMLA leave, and if so, how much leave will be designated as FMLA leave.

ENFORCEMENT

Employees may file a complaint with the U.S. Department of Labor, Wage and Hour Division, or may bring a private lawsuit against an employer.

The FMLA does not affect any federal or state law prohibiting discrimination or supersede any state or local law or collective bargaining agreement that provides greater family or medical leave rights.

For additional information or to file a complaint:

1-866-4-USWAGE

(1-866-487-9243) TTY: 1-877-889-5627

www.dol.gov/whd

U.S. Department of Labor | Wage and Hour Division

WHD WAGE AND HOUR DIVISION

WH1420 REV 04/16

APPENDIX D – SUMMARY OF BENEFITS

Current Summary of Benefits can be found at:



HR SharePoint
https://alpharetta.sharepoint.com/sites/HRInfo

- Quick Links
- Summary of Benefits

REVISION HISTORY

Date	Author / Requestor	Update
05/17/21	Cris Randall	PTO Donation Clarification: PTO donations will be authorized only after FMLA/Extended Leave of Absence eligibility is determined.
01/25/21	Finance Benefits	PTO Conversion – PTO Sell Back Sell-back program occurs in November.
01/25/21	Finance Benefits	Life Insurance Removed the maximum amount dollar figure ($650,000). Current maximum amount is $750,000 and may increase from time-to-time.
12/17/20	Cris Randall	Notice of Resignation, Retirement & Separation of Employment Clarification: time-off benefits cannot be used to extend employment date beyond last day scheduled to work. Changes on date of resignation (last day) must be approved by HR.
12/09/20	Cris Randall / Tom Harris	Parental Leave Clarification: include eligibility for foster care placement.
12/01/20	Cris Randall / Tom Harris	PTO Donation Clarification: hours donated are as hour-per-hour bases. For instance, if 10 hours are donated, the donee receives 10 hours, regardless of their rate of pay.
12/01/20	Cris Randall	Paid Time Off Included table for bi-weekly accrual earnings and annual workdays.
11/03/20	Finance Benefits	Military Training – Leave Due to Annual Training Updated leave duration from 15 to 18 to match State legislation.
07/01/20	Cris Randall / Tom Harris	Pay for Performance Clarification: employees must have at least 6 months of service and have worked at least 6 months of the evaluation period to receive merit pay consideration. Clarification: lump-sum paid in bi-weekly installments.
01/01/22	Cris Randall	Personnel File & Access to Employee Information Updates reflects that all personnel files are now accessible to employees electronically at any time during their employment with the City.
07/21/22	Cris Randall	Acting Pay Included definition of Acting Appointment definition.
07/26/22	Christine Young	Recreation, Parks & Cultural Services Activities Included benefits information.
08/15/22	Cris Randall	Bereavement Leave Clarification: all spouse related relationships apply to domestic partners. Added: aunt, uncle, niece, nephew to immediate family denomination.
11/01/22	Cris Randall	Position Control Overfill. New section.

07/01/23	Finance – Payroll	Payday and Pay Periods Clarification about under and over payments.
07/01/23	Finance – Payroll	Status Changes and Pay Cycles New section to clarify current practice.
03/04/24	Carl Hall	Identification Cards ID badges for Public Safety will be issued at the PD headquarters.
04/02/24	James Drinkard	Social Media General updates to align with current technology and legislations.
06/07/24	Cris Randall	Anti-Harassment Updated language to align with EEOC's April 29, 2024, guidance, to include protection on the basis of gender identity, gender expression, and pregnancy-related decisions.
07/01/24	Cris Randall	Pregnant Workers Fairness Act (PWFA) New legislation that went into effect on June 18, 2024.
10/07/25	Cris Randall	Basic Work Rules - Workplace Conduct & Respect of Others. Included language that emphasizes the importance of workplace conduct while referencing related sections of the document to enhance clarity, expectations, reinforce consistency, and guide readers to additional relevant information.
10/09/25	Finance Benefits	FMLA Clarification about FMLA designation.
11/19/25	Chris Lagerbloom	Position Control Overfill Clarification of trickle-down effect.
11/20/25	Fire Department	PTO Update minimum PTO increment for Fire Sworn to (4) hours to align with operational needs.
03/17/26	HR & Finance Benefits	Civic Responsibilities Clarification about reporting to work and use of accrue leave expectations.
03/17/26	Cris Randall	Internal Equity Narrative to reflect current practices.
03/26	IT Department	Communications Session Updated to align with new IT policies.
04/26	HR Department	Paid Time Off Upon Hire Extend benefits to all position classifications in addition to Police & Fire sworn.
04/26	Finance Benefits	Paid Time Off Increased Maximum PTO Accrual balance

STAFF REPORT

Department: Human Resources
Submitted By: Cris Randall
Meeting Date: May 4, 2026

AGENDA ITEM:

Resolution: Formalizing Administrative Updates to the Employee Manual and Benefits Handbook
Consideration and approval of a Resolution formalizing the administrative update process and its defined conditions for the Employee Manual and Benefits Handbook.

STAFF RECOMMENDATION:

It is recommended that the Mayor and City Council adopt the resolution formalizing the existing practice allowing the Director of Human Resources, in consultation with the City Administrator, to make operational revisions to the Employee Manual and Benefits Handbook as presented.

BUDGET & PROCUREMENT:

BUDGETED ITEM: NO
FISCAL IMPACT: NO
INCLUDED IN CURRENT FY CPTL BUDGET: NO
INCLUDED IN CURRENT FY OPRT. BUDGET: NO
TOTAL PROJECT COST:
APPROPRIATIONS:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

EXTERNAL FUNDING SOURCES:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

ITEM DESCRIPTION:

The purpose of this resolution is to formalize a consistent past practice that allows the Human Resources Department, through the Director of Human Resources, in consultation with the City Administrator, to make future updates to the Employee Manual and Benefits Handbook that do not directly impact the City's budget.

This limited authority allows Human Resources to streamline the update process and make timely updates to operational policies, such as hiring procedures, workplace rules, accommodation and return-to-work procedures, changes in mandated employment-related legislation, communications and technology guidelines, safety procedures, and similar items, as well as clarifications to language and updates related to employment relations. These updates support consistent interpretation and implementation across departments and ensure employees are promptly informed of applicable changes.

Any proposed revisions to the Employee handbook that would result in an adjustment to the City's budget, including, for instance, additional staffing, or changes to compensation or benefits, will continue to require approval of the Mayor and Council.

ALTERNATIVES:

The Mayor and Council may elect not to approve the proposed resolution, in which case all updates, including minor language edits, document formatting changes, mandated legislation, and other operational procedure updates, would require Council approval.

ATTACHMENTS:

1. Resolution Authorizing Staff to Make Revisions to the Employee Manual

RESOLUTION NUMBER:

A RESOLUTION BY THE MAYOR AND COUNCIL OF THE CITY OF ALPHARETTA, GEORGIA TO AUTHORIZE THE DIRECTOR OF HUMAN RESOURCES AND THE CITY ADMINISTRATOR TO MAKE OPERATIONAL REVISIONS TO THE EMPLOYEE MANUAL AND BENEFITS HANDBOOK

WHEREAS, the City of Alpharetta's Charter provides that it may adopt rules and regulations concerning personnel policies as may be necessary to provide for adequate and systematic handling of personnel affairs; and

WHEREAS, the City of Alpharetta has adopted and revised from time to time the City of Alpharetta Employee Manual and Benefits Handbook (the "Employee Handbook"); and

WHEREAS, under current procedures, any revisions to the Employee Handbook, regardless of the nature or extent, are voted upon by the Mayor and Council of the City of Alpharetta for adoption; and

WHEREAS, the City of Alpharetta maintains a Department of Human Resources, headed by a Director, which is responsible for establishing, administering, enforcing and effectively communicating sound employee policies and practices; and

WHEREAS, the Department of Human Resources has the expertise to revise the Employee Handbook as is necessary from time to time to align the Employee Handbook with sound employee policies and practices; and

WHEREAS, operational efficiency and flexibility would be increased by authorizing the Department of Human Resources, through the Human Resources Director, and in consultation with the City Administrator, to revise the Employee Handbook's operational policies where such revisions would not result in an adjustment to the City's budget.

NOW THEREFORE, BE IT RESOLVED by the Mayor and City Council of the City of Alpharetta as follows:

1. The Employee Handbook may be revised by the Human Resources Director where such revisions concern operational policies only and would not result in an adjustment to the City's budget, including, for instance, revisions to workplace expectations. Upon written approval of the City Administrator, any such revisions are effective and operative as the personnel policies of the City and do not require approval of the Mayor and City Council.

2. Any proposed revisions to the Employee Handbook that would result in an adjustment to the City's budget, such as changes to compensation or benefits, still require approval of the Mayor and City Council.

3. This Resolution shall become effective immediately upon adoption.

[SIGNATURES CONTINUED ON FOLLOWING PAGE]

[SIGNATURES CONTINUED FROM PRECEDING PAGE]

SO RESOLVED this ____ day of _____ 2026.

CITY OF ALPHARETTA

By: _____
Jim Gilvin, Mayor

COUNCIL MEMBERS

_____
Mayor Pro Tem Dan Merkel

_____
Council Member T. Kirk Driskell

_____
Council Member Katie Reeves

_____
Council Member Douglas J. DeRito

_____
Council Member John Hipes

_____
Council Member Fergal M. Brady

(SEAL)

Attest:

_____
Grace Orehosky, Acting City Clerk

Approved as to form and legal sufficiency:

_____
Molly Esswein, City Attorney

STAFF REPORT

Department: Council
Submitted By: Grace Orehosky
Meeting Date: May 4, 2026

AGENDA ITEM:

Resolution: Appointment of Code Enforcement Board Member
Consideration and adoption of a Resolution to appoint Carlos Campos as a member of the Code Enforcement Board.

STAFF RECOMMENDATION:

Adopt a Resolution to appoint Carlos Campos to the Code Enforcement Board in order to fill a vacancy.

BUDGET & PROCUREMENT:

BUDGETED ITEM: NO
FISCAL IMPACT: NO
INCLUDED IN CURRENT FY CPTL BUDGET: NO
INCLUDED IN CURRENT FY OPRT. BUDGET: NO
TOTAL PROJECT COST:
APPROPRIATIONS:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

EXTERNAL FUNDING SOURCES:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

ITEM DESCRIPTION:

The Code Enforcement Board is responsible for hearing and deciding appeals and enforcement matters related to violations of the City of Alpharetta Code of Ordinances. The Board serves an important role in ensuring compliance with community standards and supporting the health, safety, and welfare of Alpharetta residents.

There is currently a vacancy on the Code Enforcement Board. Per Section 2-153 of the Code of the City of Alpharetta prescribes that Code Enforcement Board shall consist of seven (7) members and up to two (2) alternate members, and said members are to be appointed by Resolution of the Mayor and Council.

The City received interest from Carlos Campos, who has expressed a desire to serve the community through participation on the Code Enforcement Board. The candidate brings extensive leadership and analytical experience through prior service as a Naval Officer and as a senior-level professional in the private sector and meets all eligibility requirements for service.

ALTERNATIVES:

Do not adopt a Resolution to appoint Carlos Campos to the Code Enforcement Board, and appoint a different individual to serve.

ATTACHMENTS:

1. Resolution Appointing Carlos Campos to Code Enforcement Board
2. Campos_Carlos_Resume_Redacted

RESOLUTION NUMBER:

A RESOLUTION BY THE MAYOR AND COUNCIL OF THE CITY OF ALPHARETTA, GEORGIA TO APPOINT A MEMBER OF THE CODE ENFORCEMENT BOARD IN ORDER TO FILL A VACANCY

WHEREAS, pursuant to the Official Code of Georgia Annotated Section 36-71-1, et seq. ("Local Government Code Enforcement Boards Act") and Article IV of the Code of the City of Alpharetta, the Mayor and Council established the City of Alpharetta Code Enforcement Board with authority to impose administrative fines and other non-criminal penalties to provide an equitable, expeditious, and effective method of enforcing City codes and ordinances; and

WHEREAS, Section 2-153 of the Code of the City of Alpharetta prescribes that Code Enforcement Board shall consist of seven (7) members and up to two (2) alternate members, and said members are to be appointed by Resolution of the Mayor and City Council; and

WHEREAS, there exists a vacancy on the Code Enforcement Board requiring appointment by the Mayor and City Council; and

WHEREAS, Carlos Campos has expressed a desire to serve the community through participation on the Code Enforcement Board and brings extensive leadership and analytical experience through prior service as a Naval Officer and as a senior-level professional in the private sector; and

WHEREAS, the Mayor and City Council desire to appoint Carlos Campos to fill the existing vacancy and to serve in accordance with the terms established under the Code of the City of Alpharetta.

NOW THEREFORE, BE IT RESOLVED by the Mayor and City Council of the City of Alpharetta as follows:

- Carlos Campos is hereby appointed to serve as a Member of the Code Enforcement Board for a term ending May 4, 2029, or until such time as their successor is appointed, or they are otherwise removed.

SO RESOLVED this ____ day of May _____.

CITY OF ALPHARETTA

By: _____

Jim Gilvin, Mayor

[SIGNATURES CONTINUED ON FOLLOWING PAGE]

[SIGNATURES CONTINUED FROM PRECEDING PAGE]

COUNCIL MEMBERS

_____
Mayor Pro Tem Dan Merkel

_____
Council Member T. Kirk Driskell

_____
Council Member Katie Reeves

_____
Council Member Douglas J. DeRito

_____
Council Member John Hipes

_____
Council Member Fergal M. Brady

(SEAL)

Attest:

_____
Grace Orehosky, Acting City Clerk

Approved as to form and legal sufficiency:

_____
Molly Esswein, City Attorney

CARLOS ALBERTO CAMPOS

Alpharetta, GA | [redacted]

Executive Profile

A proven Senior Sales Manager and Naval Officer, with seventeen years of experience leading and adding value across diverse organizations by driving results, cultivating trusting relationships, and managing complex projects involving Enterprise cloud and AI solutions to exceed executive leadership and shareholder business goals.

COMPETENCIES AND STRENGTHS:

● Creates value for the business through strategic planning, solution selling, pipeline generation, building relationships, training, recruiting, and managing complex teams involving sellers, cross-functional leaders, solutions engineer, and partners. ● Fosters strong relationships and cultivates with decision-makers in order to close deals while meeting the company's strategy. ● Strategic thinker and performance-driven leader who sets weekly & quarterly expectations, feedback, and enforces accountability. ● Maintains a culture of integrity while accomplishing business initiatives and customer priorities.
● Deeply comfortable in ambiguous, fast-paced, and changing environments.

EDUCATION:

University of Michigan, Ross School of Business - Masters of Business Administration
United States Naval Academy (Annapolis, MD) - B.S., American Politics and International Relations

PROFESSIONAL EXPERIENCE:

Sr. Strategic Account Director, Enterprise Banking and Financial Services (Atlanta, GA) Salesforce, 2022 - Present Team leader, responsible for setting strategic direction, hiring, training, and developing a team of co-AE's to drive incremental revenue growth in our enterprise account in the southeast. Team is focused on the financial services industry with firms that have over 5000 employees. Develop and execute sales strategies to achieve individuals , team and organizations quotas - as well as help companies and shareholders execute on strategic visions that help transform their business in the marketplace.

- FY 25 - Projected 130% Quota. (Over 6 Clouds)
- FY 24 - Achieved 489% Quota. (Over 6 clouds)
- FY 23 - Achieved 100% Quota. (Over 4 Clouds)
- Award - Chairman's Club -FY24
- Award - FINS Enterprise AE of the Year -FY24
- Created over $ 25 Million in pipeline generation

Strategic Account Executive, Enterprise Banking (Atlanta, GA) Salesforce, 2020 – 2022
Core FINS Sales Account Executive, for the #1 CRM company, responsible for setting strategic direction, growing revenue, leading cross functional sellers, and building pipeline while meeting quota. Hired during the Pandemic, I focused on leveraging my network, providing strategic direction and account management. Sold: Salesforce FSC license, Slack, Mulesoft, Tableau, Security, and Training.

- FY 22 - 80% YoY Growth
- FY 21 - 21% YoY Growth
- Created over $6 Million in pipeline generation

Strategic Account Manager (Atlanta, GA) General Electric 2016 – 2019
Sales leader responsible for developing and growing opportunities within Financial Services & C&H verticals. Leveraged the GE Store, a broad portfolio of enterprise solutions (SaaS, Energy Management, & Capital), to deliver outcomes that solve the customer's toughest problems using sophisticated data collection and analytics. Led a cross-functional team responsible for advisory services, project management, and creating service models that enable energy savings through the adoption of efficient technologies such as LED, controls, and sensors.

- FY 19 100% YoY Growth.
- Created $11 Million in pipeline generation
- Account base included: BB&T, BBVA, Regions, Wells Fargo, Synovus, Amazon, & all GE business units.

Naval Officer, Lieutenant Commander (Japan, Italy, U.S.) U.S. Navy, 2009 - 2016; 2019
Completed four surface warfare tours as a trusted leader for U.S.Navy commands in Japan,Italy, Norfolk, and Washington, D.C.

- Leader: Managed and led 30-person teams for PACOM and EUCOM area of responsibilities.
- Intelligent Advisor: Responsible for producing top secret information to policy stakeholders and U.S. SECDEF and Office of Naval Intelligence.

Personal: Proud Husband and father of three girls. Visited 55+ countries. Marathon Finisher (5X). ReM.A.R.C.able Charity Volunteer. Lieutenant Commander, USNR. First generation Nicaraguan American

STAFF REPORT

Department: Community Development
Submitted By: Kathi Cook
Meeting Date: May 4, 2026

AGENDA ITEM:

Alpharetta Rental Housing Study Update Presentation

The City of Alpharetta engaged KB Advisory Group to examine the historical relationship between rental and owner housing in the City and analyze the potential proportion of future rental housing in Alpharetta to be consistent with the 2040 Comprehensive Plan. Housing Policy 2 of the comprehensive plan seeks to maintain a balance between 'owner-occupied' and 'renter-occupied' in Alpharetta such that at least 68% of the housing stock is 'owner-occupied'. Geoff Koski, KB Advisory Group, will present an overview of the Alpharetta Rental Housing Study Update, December 2025.

STAFF RECOMMENDATION:

BUDGET & PROCUREMENT:

BUDGETED ITEM: NO

FISCAL IMPACT: NO

INCLUDED IN CURRENT FY CPTL BUDGET: NO

INCLUDED IN CURRENT FY OPRT. BUDGET: NO

TOTAL PROJECT COST:

APPROPRIATIONS:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

EXTERNAL FUNDING SOURCES:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

ITEM DESCRIPTION:

Presentation of the Alpharetta Rental Study prepared by KB Advisory Group. This is a Workshop Item for discussion purposes only. No vote will be taken.

ALTERNATIVES:

ATTACHMENTS:

1. Alpharetta Rental Housing Study Update
2. Council Workshop Presentation

Alpharetta Rental Housing Study Update

Determining the current and future mix of renter and owner housing in the city

Prepared for the City of Alpharetta, Georgia

Prepared by KB Advisory Group

December 2025

DRAFT

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SUMMARY

The City of Alpharetta engaged KB Advisory Group (KB) to examine the historical relationship between rental and owner housing in the city and, from that analysis, analyze the potential proportion of future rental housing in Alpharetta. This report serves as a benchmark update to the most recent version of this study that was completed in 2022. As such, it includes newly released figures from both the 2010 and 2020 Decennial Census and the 2015 and 2023 American Community Survey (US Census) as well as current market data that reflect the ongoing effects of market fluctuations on the local and regional housing situation.

The key findings of the research are as follows:

Current Rental Housing Ratio – According to the US Census, the city's share of renter-occupied households has declined over the past few years to 32%, which is completely in line with the City's comprehensive plan target of 32%, though half a percent or so of margin of error in either direction should be assumed to factor for reporting errors.

Housing Development Pipeline – Since the 2022 housing report, 2,739 units have been completed, approved, or currently under construction. Of those, 416 units have been completed and another 2,323 have been approved or are currently under construction.

Among the 2,323 units in the pipeline, 280 are multifamily units, representing 16% of the overall pipeline.

A total of 1,780 single-family, townhome, or condominium units have been completed since the 2022 report or are in the active pipeline, of which 30% are single-family units and 70% are townhome or condo units. Based on existing patterns in the city, 5% of single-family units and 20% of townhome/condo units are rentals. Applying these ratios to the pipeline, about 36% of new units are expected to be rented with the remaining 64% being owner-occupied.

After applying assumptions for typical vacancy and for the percent of new units that will be renter versus owner-occupied, Alpharetta's rental housing tenure ratio is expected to increase very slightly, amounting to less than a percentage increase (up to 32.6% from 32%).

Decline in Single-Family Rental Units – According to Census data, an increase in the total number of households renting the unit that they live in occurred between 2020 and 2023, however this occurred against a development and tenure context in which the number of multifamily units in the City of Alpharetta increased moderately and the percentage of single-family rentals decreased from roughly 21% in 2020 to around 17% as of 2023 reporting.



Characteristics of Rental Apartment Complexes – According to data from CoStar, there are 22 market-rate rental apartment communities of 20 or more units located in the City of Alpharetta, with an average age of 24 years. Among this inventory, nine have opened since 2000, eight were developed in the 1990s, and the remaining five opened in the 1980s. There are 6,955 units among the 22 complexes, representing 88% of the city's total rental inventory. The average size of these units is 953 SF and the current average asking rent is $1,895, or $1.99 per SF, which is up 3% from the previous rental study in 2022. The overall vacancy rate as of September 2025 was 5.1%.

Changes in Renter Profile – As of 2023, 17% of renter households were headed by a person under the age of 35 and renter households headed by a resident age 35-54 moderated significantly, dropping down to around 64% of renter households, possibly suggesting that many of the renters in this age group were renting short-term while they awaited for-sale opportunities to become available. Additionally, more households earning more than $75,000 annually have become renters within the City in recent years, likely as a result of rising housing costs for for-sale options and unfavorable interest environments, which both make mortgage terms unfavorable and discourage movement of existing homeowners.

Building Permit Activity – From March 2022 through December 2024, there were a total of 883 residential building permits issued in the City, an annualized average of 294 permits. This was slightly lower than the 10-year average from 2014 to 2024 during which time the average number of permits issued annually came to 360 units. Since the 2022 study, 29% of permits issued have been for multifamily units, which is above the 10-year multifamily share of 21%.

Senior Rental Housing – An analysis of senior rental housing in Alpharetta shows that it has a significant presence in the housing inventory with 14 properties and a total of 1,740 units. Only one senior project has been completed since the 2022 report, which was a second phase of an existing facility, Village Park Milton. As of 2022, senior rental housing represents 22% of all units in rental complexes in the city, up only slightly from 21% in the 2022 study.

Regional Rental Housing Trends – Supported by a recent increase in the share of multifamily renters, Alpharetta continues to have a higher share of renter-occupied housing than surrounding communities in the north metro area. The city's 32% renter share exceeds the overall renter share of 27% for all of North Fulton County and 22% for the wider North Metro area, which includes North Fulton, East Cobb, and the entirety of Cherokee and Forsyth counties.

IMPACT OF ALTERNATIVE GROWTH RATES AND TENURE PATTERNS, 2023-2030

	Owner Occupied		Renter Occupied		Total
Current Pipeline Scenario					
Existing Housing Stock, 2023	16,872	68%	7,938	32%	24,810
Addtions from Current Pipeline	1,482	64%	841	36%	2,323
Future Housing Stock, Including Pipeline	18,354	68%	8,779	32%	27,133
North Metro Average Scenario					
Existing Housing Stock, 2023	16,872	68%	7,938	32%	24,810
New Construction	1,820	78%	503	22%	2,323
Future Housing Stock	18,692	69%	8,441	31%	27,133

Source: KB Advisory Group

Impact of Future Growth in Rental Units on Inventory – The current pipeline of units under construction and approved in Alpharetta includes a total of 2,323 units, of which 64% are planned as owner-occupied units and 36% are expected to be renter occupied. If the current pipeline of 2,323 units were to be fully developed and absorbed over the next five years, it would represent an annual growth rate of 1.8%. This growth exceeds the long-term annual household growth rate in the city of .9% and is well above the annual household growth rate of .6% forecasted by Claritas Environics Analytics, a third-party data provider.

If the future development pipeline in Alpharetta was balanced to match the owner-to-renter ratio for the broader North Metro area of 78/22, this would result in about 340 units shifting to being owner-occupied instead of renter occupied. In this scenario, the resulting renter household share at buildout would be 31%, which is below the targeted figure of 32%. Given the limited number of development sites in the city and the very high cost of land, though, this balance is not likely to

be realistic. As such, the overall tenure ratio in the city is more likely to remain in the range of 32-34% renters and 66-68% owners over the next few years.

The city's 2021 Comprehensive Plan update extended the existing goal of having 32% of the overall housing inventory be rental housing. This long-range goal would be consistent with historical renter ratios in the city and would help fulfill the ongoing market needs for rental housing that are not being met elsewhere in the North Atlanta metro region.

This goal could be achieved with rental housing additions of 149 units per year, which is derived from applying the 32% ratio to the average number of permits issued per year from 2014-2024 and the expected number of permits per year based on the current pipeline. Calculations are as follows:

- Total Permits issued 2014-2024: 3,959 units
- Average Permits issued 2014-2024: 360 units
- Expected Permits per Year, 2026-2030: 465 units
- Targeted Rental Unit Proportion at 32%: 149 units annually

The total number of targeted rental unit permits should be adjusted every five years to reflect recent trends in total permitting activity. Permits for new units to be created on the site of existing rental apartments could be exempted from this annual limitation as an incentive to redevelop older complexes.

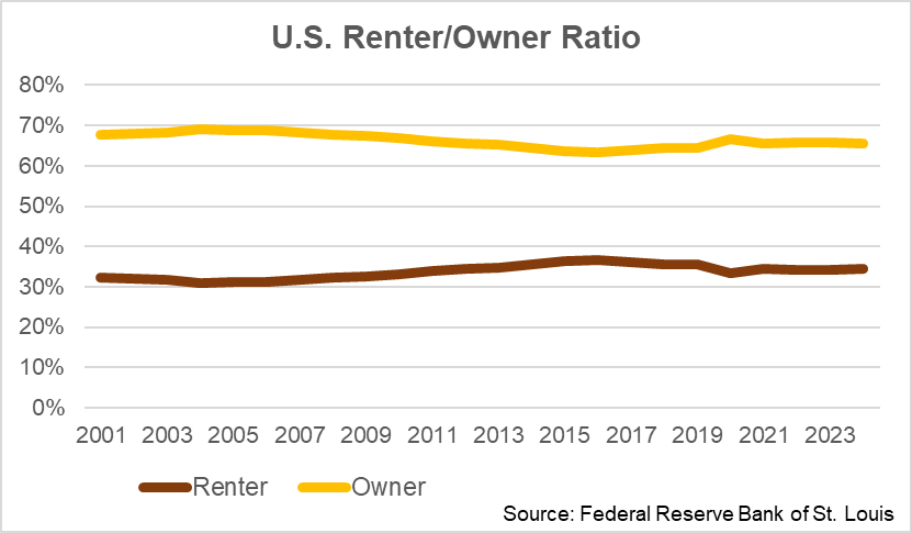
Presented in the following sections is a more detailed discussion of the research which supports these findings.

INTRODUCTION AND PURPOSE OF THE STUDY

The City of Alpharetta engaged KB Advisory Group (KB) to update its examination of the historical relationship between rental and owner housing in the city and, from that analysis, determine an appropriate proportion of future rental housing in Alpharetta, based on more recent data. The City of Alpharetta is interested in understanding what has been the historical relationship between renter and owner housing demand and the housing inventory. Understanding this relationship will allow the City to adopt policies in its comprehensive plan, zoning and land use policies that can achieve the desired balance between renter and owner units into the future as Alpharetta continues to grow.

The balance between renter and owner housing in a community is an outcome of a complex interaction of a number of factors, including: land values in an area, local land use policies, the historical pattern of development in area in terms of both the relative presence of residential and non-residential land uses, and the level of suburbanization/urbanization that has occurred over time. Another key variable is the characteristics and preferences of households in the area. National economic trends also play a role in the relationship between rental and owner housing.

For example, as shown below national data on renter/owner ratios from U.S. Census data, reported by the Federal Reserve Bank of St. Louis, shows there have been slight fluctuations over the past 20 years in the percentage of renter/owner ratio, with growth in the percentage of Americans who are renters and a slight decline in the share of those who are owners.



After peaking at 69% in 2004, the national homeownership rate declined during Great Recession and its aftermath and bottomed out at 63.4 percent in 2016. The homeownership rate increased in reaction to the COVID-19 pandemic, rising 200 basis points from 64.6% in 2019 to 66.6% in 2020. However, the rate ticked back down to 65.5% in 2021 and has remained relatively stable since that time, as strong apartment construction, high interest rates and historically low for-sale inventory limited homebuying opportunities for many households.

The purpose of this study is to analyze what has been the ratio of rental housing demand and supply in the City of Alpharetta in the past and given that pattern, what would be the appropriate ratio between renter and owner housing development in the city in the future. This study additionally examines trends in senior housing, which presents a growing market locally and

nationally. The information and analysis in this study are designed to provide the basis for the city to establish land use policies for the future that will be designed to achieve the appropriate balance between different housing types in Alpharetta's housing inventory.

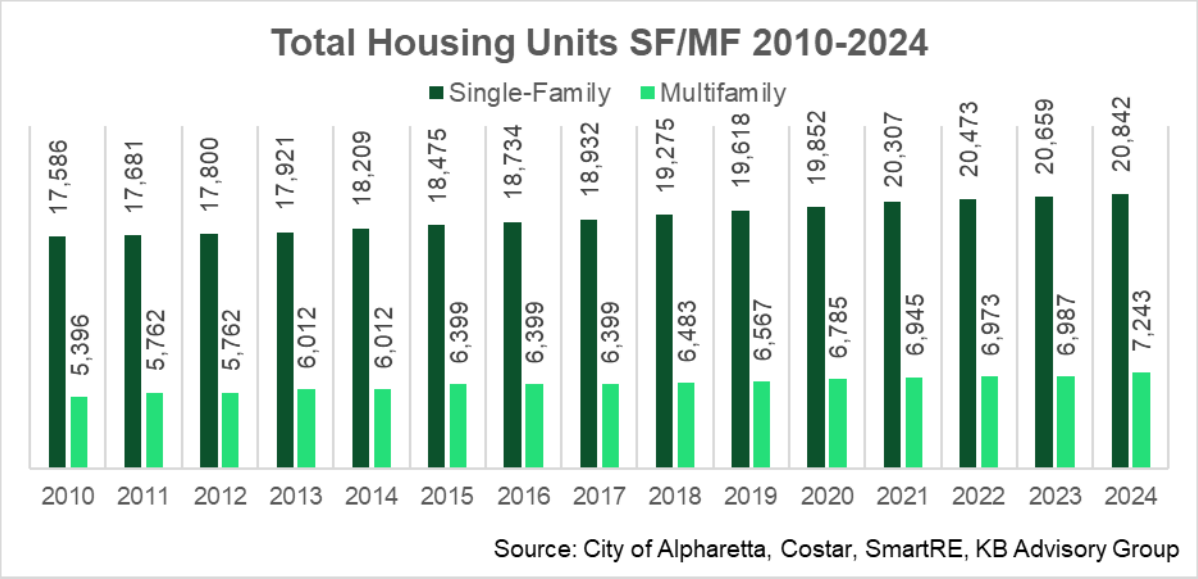
Existing City Policy and Practice

In December 2021 the City of Alpharetta adopted Horizon 2040, an update to its comprehensive plan. The plan outlines the future land use needs of Alpharetta in terms of acreage that will be required to ensure that this is sufficient land area to accommodate the needs of the community. Policy 2 in the Housing Element of Horizon 2040 expresses the city's goals for the balance between owner- and renter-occupied housing as follows:

> *"H Policy 2: Maintain a balance between 'owner-occupied and 'renter-occupied' in Alpharetta such that at least 68% of the housing stock is 'owner-occupied'." (p. 41)*

Over the past decade Alpharetta has been able to maintain a stable balance of renter-occupied and owner-occupied housing. As explained in Section 1, the city's share of renter-occupied households has declined over the past few years to 32%, which is completely in line with the City's comprehensive plan target of 32%, though half a percent or so of margin of error in either direction should be assumed to factor for reporting errors.

The distribution between single-family and multifamily units is an indicator of the owner vs. renter balance, although it does not correlate exactly – there are many single-family rental units and owner-occupied condominium units in the city. As shown in the table below Alpharetta added 1,847 multifamily units (+34.2%) and 3,256 single-family units (+18.5%) from 2010 to 2024. As a result of the faster growth rate of multifamily units, the balance between single- and multi-family units shifted from 77/23 in 2010 to 74/26 by 2024.



HOUSING UNIT INVENTORY BY UNIT TYPE FOR ALPHARETTA, 2010-2024

Units	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Change Number	Change Percent
Single Family	17,586	17,681	17,800	17,921	18,209	18,475	18,734	18,932	19,275	19,618	19,852	20,307	20,473	20,659	20,842	3,256	19%
Multi-Family	5,396	5,762	5,762	6,012	6,012	6,399	6,399	6,399	6,483	6,567	6,785	6,945	6,973	6,987	7,243	1,847	34%
Total	22,982	23,443	23,562	23,933	24,221	24,874	25,133	25,331	25,758	26,185	26,637	27,252	27,446	27,646	28,085	5,103	22%
% Multi-Family	23%	25%	24%	25%	25%	26%	25%	25%	25%	25%	25%	25%	25%	25%	26%		

Source: City of Alpharetta, CoStar, SmartRE, KB Advisory Group

SECTION 1: EXISTING ALPHARETTA HOUSEHOLDS: TENURE PREFERENCES AND CHARACTERISTICS

GROWTH IN HOUSEHOLDS IN ALPHARETTA AND THEIR TENURE PREFERENCE

As seen in the following table, Alpharetta experienced significant population and household growth from 2015 to 2020, according to data from the US Bureau of the Census. Population increased from 62,054 to 66,566, an addition of more than 4,500 new residents and a growth rate of 7.3% over the five-year span. During the same time, households increased from 22,824 to 23,958, an increase of 1,100 households and a growth rate of 5.0%. The stronger rate of population growth relative to household growth reflects an increase in family households and a decrease in single-person households over the past five years.

Between 2020 and 2023, however, the Census-reported trends on population and households reflect a slightly different story at play. Between 2020 and 2023, the population of the City of Alpharetta declined modestly by 211 people. Importantly, the number of households in the city actually grew during this same period, suggesting a very important shift that may simply be characteristic of this three year period, or in time be revealed as the beginning of a new trend defined by a shift from more family households to more small households comprised of singles and married couples without children.

The number of owner-occupied households increased between both the period of time between 2015 and 2020 and between 2020 and 2023, with the growth rate of owner-occupied households between 2020 and 2023 significantly slower than the growth observed between 2015 and 2020. While renter households declined significantly between 2015 and 2020, representing an 803-household decrease, the period between 2020 and 2023 saw an increase in renter households, amounting to a 204-household increase.

The increase in renter households is likely attributable to both multifamily development trends and rising costs of ownership and the broader interest rate and lending environment, which has made homeownership a greater challenge for many, particularly younger households looking to make the transition from rentership to ownership.

OWNER AND RENTER HOUSEHOLDS IN ALPHARETTA 2015 - 2023

	2015		2020		2023		Growth 2015-2020		Growth 2020-2023	
	Total	%	Total	%	Total	%	Total	%	Total	%
Population	62,054		66,566		66,355		4,512	7.3%	(211)	-0.3%
Households	22,824		23,958		24,810		1,134	5.0%	852	3.4%
Owner Households	14,287	63%	16,224	68%	16,872	68%	1,937	13.6%	648	3.8%
Renter Households	8,537	37%	7,734	32%	7,938	32%	(803)	-9.4%	204	2.6%

Source: U.S. Census, 2015, 2020, 2023 American Community Survey

CHARACTERISTICS OF RENTER HOUSEHOLDS IN ALPHARETTA

Renter households in Alpharetta continue to have characteristics that differentiate them from the overall household characteristics in the city. Alpharetta's renter-occupied households have the following characteristics:

Small households, but slightly larger than in the past – Most renter households in Alpharetta (68.5%) consist of one or two persons. From 2020 to 2023, the single-person share increased from 35% to 37%, while larger households lost market share.

Roommates and unmarried couples remained constant – From 2020 to 2023 the share of nonfamily households with two or more residents increased only marginally (.2%) however this group remained a steady 10% of all rental households in the City during this period.

Share of rentals with children continues to decrease – The share of renter households with children under the age of 18 declined from 38.4% in 2015 to 37.0% in 2020, which dropped further to 34.9% as of 2023.

Recent generational corrections among renters – In 2015, 43% of Alpharetta's renter households were headed by a person under the age of 35 and 51% were headed by a resident age 35-64. By 2020, younger renters under 35 only represented 10% of the local market, while the age 35-64 cohort share increased rapidly up to 80%. As of 2023, 17% of renter households were headed by a person under the age of 35 and renter households headed by a resident age 35-54 moderated significantly, dropping down to around 64% of renter households, possibly suggesting that many of the renters in this age group were renting short-term while they awaited for-sale opportunities to become available.

RENTER HOUSEHOLD CHARACTERISTICS IN ALPHARETTA, 2023			2020-2023 Change	
	All HHs	Rental HHs	All HHs	Rental HHs
Number of Households	24,810	7,938	852	204
Household Size				
1-person	20.7%	36.9%	0.3%	2.0%
2-person	32.5%	31.7%	0.2%	4.4%
3-person +	46.7%	31.5%	-0.6%	-6.4%
Household Type				
Family Households	73.8%	52.8%	-0.6%	-2.2%
Married Couples	63.7%	40.0%	0.5%	3.6%
Single Parent-Female	7.3%	7.8%	-0.9%	-4.4%
Single Parent-Male	2.8%	5.0%	-0.1%	-1.4%
Non-Family Households	1.1%	47.2%	-28.1%	2.2%
Singles	20.7%	36.9%		2.0%
2 or more Persons	5.5%	10.4%	0.2%	0.2%
Children Present				
With Children	34.4%	34.9%	-6.2%	-2.1%
Without Children	65.6%	65.1%	6.2%	2.1%
Age of Householder (Married Couples)				
Householder 15-34	6.7%	16.7%	0.3%	6.5%
Householder 35-64	78.3%	63.6%	-2.8%	-16.4%
Householder 65+	15.0%	19.7%	2.5%	9.9%

Source: U.S. Census, American Community Survey (2015, 2020, 2023)

Income levels among Alpharetta's renter households are diverse, but have changed meaningfully between 2020 and 2023. While in 2020, income levels were fairly evenly split, with 34% earning less than $50,000 per year, 39% earning between $50,000 and $99,999, and 27% earning $100,000 or more. By comparison, as of 2023, 49% of households in Alpharetta earned more than $150,000 annually, with those earning less than $50,000 accounting for only 18% of the City's households. Higher earning households are much more likely to be owners, while lower earning households are more likely to be renters, likely by necessity.

Growth in the income levels of Alpharetta's households has been strong in recent years, where renter household income has grown more quickly than owner incomes, likely reflecting the heightened barrier to entry to homeownership, which has equated to more higher-earning households renting instead of buying. The median household income for renters in the city increased from $71,920 in 2020 to $88,432 as of 2023, an annual average growth rate of 4.2%. During the same period, the median income for household owners increased by 1.9% annually, rising from $163,350 to $179,602.

DISTRIBUTION OF HOUSEHOLD INCOME IN ALPHARETTA, 2023

	Renter		Owner		
Household Income	%	Number	%	Number	% Renter
Less than $25,000	18.8%	1,493	3.1%	516	**74.3%**
$25,000-$49,999	19.5%	1,550	5.7%	966	**61.6%**
$50,000-$74,999	11.6%	922	6.8%	1,142	**44.7%**
$75,000-$99,999	14.5%	1,153	7.1%	1,202	**49.0%**
$100,000-$149,999	19.9%	1,581	12.4%	2,084	**43.1%**
$150,000+	15.6%	1,239	65.0%	10,962	**10.2%**
	100.0%	**7,938**	**100.0%**	**16,872**	
Median Household Income					
2020	$71,920		$163,350		
2023	$88,432		$179,602		
Annual % Change	4.2%		1.9%		

Source: U.S. Census, 2020 and 2023 American Community Survey

Between 2020 and 2023, most of the changes that occurred in the distribution of renters by income group occurred at both extremes of the income spectrum, with a 4% growth in renters earning less than $50,000 and a 9% growth in renters earning more than $100,000 annually, which resulted in a 13% decrease in middle income renters earning between $50,000 and $100,000 across the three year period. The declining share of renter households earning between $50,000 to $100,000 belongs to a broader trend within the City of Alpharetta, which has seen a general decline in the number of households in this income group, suggesting that there may be a lack of housing suited to the needs of these middle-income earners.

This increase in rentership at both poles of the income distribution corresponded with decreasing market share among homeowners for every income group except those earning more than $150,000 annually, reflecting broader trends, including unfavorable interest rate environments and regional housing accessibility and affordability issues, which have made homeownership a much less likely prospect for all but the highest earning households, and making rentership a necessity for many households that may have become homeowners in more favorable market conditions.

SECTION 2: RENTAL HOUSING INVENTORY IN ALPHARETTA

According to data from the American Community Survey, 82% of renter households in Alpharetta live in multifamily structures. Of these, 65% live in buildings with 10 or more units and 18% live in small buildings with 2-9 units. The remaining 17% of renter households live in single-family units, with slightly more (9.4%) in detached units than in attached townhouse units (7.8%).

Between 2020 and 2023 there was a net increase of about 200 renter-occupied housing units, which corresponded to a slight increase in the supply of multifamily units. This trend suggests that new multifamily products within the City of Alpharetta may be providing much needed options for the community's renters, which seek living opportunities that prioritize access to amenities and walkability over space and privacy.

While the share of single-family rentals has declined, having implications on the overall diversity of rental options in the city, the rental stock is still far more diverse than the owner-occupied stock, of which 98% is comprised of single-family units.

CHARACTERISTICS OF ALPHARETTA'S HOUSING STOCK, 2023

	Owner		Renter	
	Number	%	Number	%
Occupied Units	16,872		7,938	
Units in Structure				
Single-Family Detached	13,968	82.8%	745	9.4%
Single-Family Attached	2,478	14.7%	621	7.8%
2-4 units	34	0.2%	513	6.5%
5-9 units	210	1.2%	871	11.0%
10 or more units	182	1.1%	5,142	64.8%
Mobile Home/Other	-	0.0%	46	0.6%
Age of Structure				
2020+	341	2.0%	56	0.7%
2010-2019	2,007	11.9%	1,398	17.6%
2000-2009	3,282	19.5%	1,585	20.0%
1980-1999	10,254	60.8%	3,894	49.1%
1960-1979	885	5.2%	891	11.2%
Pre 1960	103	0.6%	114	1.4%

Source: U.S. Census, 2023 American Community Survey

While Alpharetta has experienced sustained housing growth over the past 20 years (2000 to present), the pace of new development has slowed somewhat from the preceding 20-year period (1980 to 1999). As of 2023, 36% of the city's housing stock had been built since 2000, while 57% of the stock was built between 1980 and 1999. There has been more rental development in recent years relative to for-sale development, though: 38% of units built since 2010 are rented. The bulk of the City's for-sale units were constructed between 1980 and 2000, with a significant decrease in deliveries over the comparable twenty years that followed, relatedly, the City's rental inventory is significantly newer than its for-sale inventory.

As depicted in the table below, the percentage of units that are renter-occupied varies tremendously by unit type. Whereas 97% of units in buildings with 10 or more units are renter-occupied, only 5% of single-family detached units are renter occupied. The share of single-family (detached) and townhome (attached) units that are renter occupied decreased from 2015 to 2023, as did smaller multifamily structures with less than 10 units with the exception of multifamily structures with 2 to 4 units, possibly reflecting the growth of plex units in recent years. The share of renters in larger multifamily buildings of 10+ units remained stable across the period of 2015 t0 2023, though there was a reported increase in 2020 relative to 2015. Fluctuations in the tenure of mobile home and other types of units in the city have been somewhat drastic, which reflects the relatively small size of this housing typology's inventory within the City, making it far more susceptible to drastic changes even when the number of units effected are relatively few.

These percentages were factored into the development pipeline analysis in order get an accurate assessment of the number of single-family and townhome units in the pipeline that will become renter occupied. The analysis applied a 5% assumption of renter-occupied units to single-family detached for-sale units in the pipeline, 20% renter-occupied assumption to townhomes and condominium units.

CHANGE IN OWNER & RENTER SHARES BY UNIT TYPE, 2015-2023

	2015		2020		2023	
	Owner %	Renter %	Owner %	Renter %	Owner %	Renter %
Single-Family Detached	88.3%	11.7%	93.8%	6.2%	94.9%	5.1%
Single-Family Attached	68.7%	31.3%	71.8%	28.2%	80.0%	20.0%
All Multifamily	4.8%	95.2%	8.6%	91.4%	6.1%	93.9%
2-4 Units	*10.8%*	*89.2%*	*25.2%*	*74.8%*	*6.2%*	*93.8%*
5-9 Units	*5.1%*	*94.9%*	*19.4%*	*80.6%*	*19.4%*	*80.6%*
10+ Units	*4.0%*	*96.0%*	*1.2%*	*98.8%*	*3.4%*	*96.6%*
Mobile Home/Other	28.1%	71.9%	87.4%	12.6%	0.0%	100.0%

Source: U.S. Census, American Community Survey 2015, 2020, 2023

GROWTH IN THE RENTAL HOUSING INVENTORY

In 2020, according to the US Census, there were 25,457 housing units in Alpharetta, of which 1,499 (5.9%) were vacant. Of the city's 23,958 occupied housing units in 2020, 68% were owner occupied and 32% were renter occupied. By 2023, the city's housing inventory saw an uptick to 25,994 units, an 2% growth rate over the 3-year period. The number of vacant units decreased slightly (315 units), but the vacancy rate declined to 4.6%.

HOUSING STOCK AND OCCUPANCY TRENDS IN ALPHARETTA, 2020-Pipeline Buildout

	2020		2023		Pipeline Buildout	
	Number	%	Number	%	Number	%
Total Housing Units	25,457		25,994		27,780	
Vacant Units	*1,499*	*5.9%*	*1,184*	*4.6%*	*1,615*	*5.8%*
All Occupied Units	23,958	94.1%	24,810	95.4%	26,165	94.2%
Owner Occupied	*16,224*	*67.7%*	*16,872*	*68.0%*	*17,632*	*67.4%*
Renter Occupied	*7,734*	*32.3%*	*7,938*	*32.0%*	*8,533*	*32.6%*

Source: KB Advisory Group, City of Alpharetta, U.S. Census, 2020, 2023 American Community Survey

RENTS IN ALPHARETTA

Rental rates in Alpharetta have increased rapidly over the past decade. From 2010 to 2020, the median rent in the city (as self-reported by renter households) rose by 41%, from $1,037 to $1,464. The pace of rent growth has accelerated since 2015; from 2010-2015 annual rent growth averaged 2.7%; from 2015-2020 the average growth rate was 4.3%. This growth has only accelerated since 2020, with the average annual growth rate for average rent growing by roughly 10% annually between 2020 and 2023. The growth of median rent from $1,037 in 2010 to $1,930 as of 2023 represents an 86% increase in rents within the City of Alpharetta.

RENTS IN ALPHARETTA 2010-2023

	2010	2015	2020	2023
Occupied Rental Units w/ Cash Rent	6,746	8,131	7,479	7,749
Monthly Gross Rent				
$499 or less	2.1%	2.8%	2.5%	5.0%
$500-$999	42.8%	23.9%	1.9%	1.4%
$1,000-$1,499	48.4%	55.9%	50.8%	10.5%
$1,500+	6.7%	17.3%	44.7%	83.1%
Median Monthly Rent	**$1,037**	**$1,184**	**$1,464**	**$1,930**

Source: U.S. Census, 2010, 2015, 2020, 2023 American Community Survey

The data reported by the American Community Survey for 2023 shows a very strong upward shift in cash rental costs that was not nearly as pronounced in 2020. 94% of cash rents paid in the City were reported at above $1,000 monthly, with 83% of these rents exceeding $1,500. Interestingly, ACS reported a slight increase in the share of units that pay less than $500 for rent a month. This trend may represent errors attributable to the quality and number of survey responses collected during 2020 or in 2023, however this may also suggest that in the face of growing rentership that there are a growing number of more creative living arrangements that allow for lower rental costs for a small share of the renting population.

CHARACTERISTICS OF ALPHARETTA'S RENTAL APARTMENT COMPLEXES

Since a substantial portion of Alpharetta's rental inventory is in apartment complexes, the key characteristics of this portion of the rental inventory merit additional focus. As shown below, there are currently 6,955 units in 22 market-rate, non-age restricted apartment complexes (20+ units) inside the city limits of Alpharetta that are tracked by CoStar, a national real estate database provider.

The average age of Alpharetta's rental apartment complexes has increased from 22 to 24 years since the last housing study. Among the 22 properties, 13 were built prior to 2000, and these properties account for 66% of the total inventory. Among these older complexes, the majority opened during a short span of time from 1995 to 1998; in this four-year period, there were eight properties completed, accounting for 3,040 units. These properties are all now around 25 years old. Following this surge in new supply there were just two new apartment communities completed in Alpharetta between 1999 and 2011, with a total of 813 units. Since 2012, though, there has been a resurgence in apartment development in the city, with seven new properties totaling 1,566 units having been completed in the past decade or so.

The recently completed apartment communities in Alpharetta are quite different from the older properties. Prior to 2014, all of Alpharetta's apartment communities were lower-density, garden-style apartments with multiple low-rise buildings and surface parking. Since that time, six new apartment communities have opened, five of which are mid-rise buildings with structured parking that are part of high-density, mixed-use developments: Haven at Avalon, Veranda at Avalon, Amorance at City Center, The Heights at Northwinds and most recently, Eden at Lakeview. The second property in this series of deliveries, ECHO at North Point Center is a standalone development, but is a single building, rather than a garden-style complex. Eden at Lakeview, which opened in 2024, is the only apartment development completed since the last update of this rental study. It is worth noting that non-rental, condominium style multifamily has been added to the market since the last study, namely at the Maxwell, which features a mix of townhome, single-family detached, stacked flat and condo products.

The average apartment unit in Alpharetta is 953 SF in size, and most of the inventory is concentrated in 1- and 2-bedroom units. Three apartment complexes specifically have over 25% of their inventory in three-bedroom units, but these were all built prior to 1990. The shift in unit configuration experienced in Alpharetta tracks with a national trend towards smaller units, with most new properties targeted towards empty nesters, singles, and young professionals who do not have children. This trend is exemplified in the most recently constructed project, Eden at Lakeview, where 62% of the units are 1-bedroom units.

Rental vacancies in Alpharetta are currently very low, mirroring the national trend over the past two years. As of September 2025, the overall vacancy rate among the apartment communities was 5.1%, which is down, but roughly stable compared to vacancies reported back in March of 2022 (5.3%).

Rental rates in Alpharetta have surged since the previous rental study. The average asking rent as of September 2025 was $1,895, which is down 6% from the March 2022 level of $2,013. The overall average rent per square foot in the city is now $1.99, compared with $1.93 in 2022. Rents in the city's newest properties are considerably higher than overall rents, owing to their age, locations, unit features, and amenities. All seven of the properties that have opened since 2012 have an average rent of at least $2.20/SF. The most expensive property in the city is Amorance at City Center, which commands average rents of $3,401, or $3.18/SF. The two apartment communities at Avalon – Veranda and Haven – have experienced slight divergence in pricing in the years since the last study, with Haven now commanding a slight premium over Veranda.

The key takeaway from comparing 2025 trends among Alpharetta's multifamily rental properties with 2022 trends from the previous analysis conducted is that the rental market is less tight than it was in 2022, which has resulted in a slight moderating or cooling of rents across the board in Alpharetta.

INVENTORY OF RENTAL APARTMENT PROPERTIES IN ALPHARETTA (AS OF SEPTEMBER 2025)

Property Name	Address	Yr. Built	Units	Vacancy %	Avg SF	Ask Rent	Rent/SF
Eden at Lakeview	4115 Lake St	2024	255	9.4%	942	$2,645	$ 2.81
The Heights at Northwinds	6000 Summit Plz	2021	140	12.1%	909	$2,488	$ 2.74
Amorance	2001 Commerce St	2018	168	5.4%	1,071	$3,401	$ 3.18
Veranda at Avalon	7165 Avalon Blvd	2017	276	6.5%	998	$2,399	$ 2.40
ECHO at North Point Center	10105 Westside Pky	2017	111	3.6%	932	$2,212	$ 2.37
Haven at Avalon	1213 Avalon Blvd	2014	250	5.6%	1,009	$2,681	$ 2.66
AMLI North Point	9000 Beaver Creek Rd	2012	366	5.2%	937	$2,058	$ 2.20
Lakeside at Milton Park	26000 Mill Creek Ave	2002	461	3.0%	963	$1,861	$ 1.93
Woodhaven at Park Bridge	15000 Parkview Ln	2000	352	9.9%	1,032	$2,006	$ 1.94
The Ascent at Windward	18000 Masters Way	1998	328	8.8%	1,074	$1,872	$ 1.74
Avana North Point	900 Jameson Pass	1998	264	7.2%	1,100	$1,920	$ 1.75
Bell Alpharetta	32000 Gardner Dr	1997	800	4.5%	1,021	$1,953	$ 1.91
Windward Place	3080 Market Pl	1996	288	2.4%	1,127	$1,919	$ 1.70
Cortland Lex	1000 Lexington Farms Dr	1995	360	3.3%	1,075	$1,896	$ 1.76
Wood Bridge	680 Park Bridge Pky	1995	352	5.4%	1,124	$2,177	$ 1.94
Collingwood	3400 Kimball Bridge Rd	1995	342	5.3%	1,056	$1,797	$ 1.70
IMT Alpharetta	3500 N Point Pky	1995	306	1.3%	954	$1,690	$ 1.77
Belmont at Park Bridge	150 Rockberry Ln	1989	344	5.2%	918	$1,798	$ 1.96
The Pointe at Preston Ridge	950 Executive Dr	1988	266	4.9%	1,146	$1,649	$ 1.44
Cortland Windward	905 Lake Union Hill Way	1987	294	5.1%	969	$1,783	$ 1.84
Webb Bridge Crossing	5000 Webb Bridge Ct	1986	164	6.1%	1,043	$1,774	$ 1.70
Manchester at Mansell	401 Huntington Drive	1984	468	6.4%	1,252	$1,658	$ 1.32
AVG / TOTAL		**2001**	**6,955**	**5.1%**	**953**	**$ 1,895**	**$ 1.99**

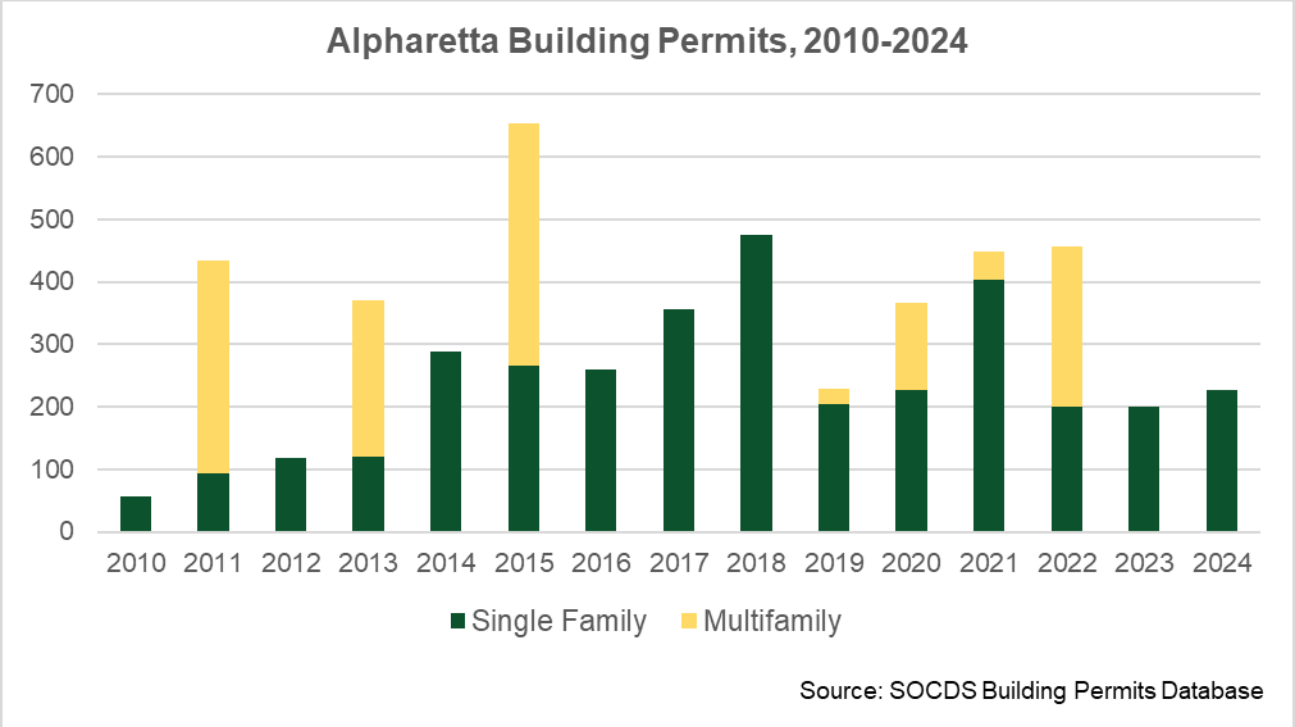
Source: CoStar

SINGLE FAMILY AND MULTIFAMILY BUILDING PERMIT ACTIVITY

Another perspective on changes in Alpharetta's rental housing inventory can be gained from a review of building permit activity for both single-family and multifamily. According to U.S. Department of Housing and Urban Development (HUD), a total of 3,959 residential building permits were issued in the City of Alpharetta between 2014 and 2024, an annual average of 360 across that period. The breakdown of these permits was 3,108 single-family units (79%) and 851 multifamily units (21%).

Since the previous residential study, which contained data through March 2022, a total of 883 residential permits were issued in Alpharetta. On an annualized basis, the average pace of permit activity since the previous study has been 294, which is somewhat below the 10-year average. This recent period has reflected a similar trend to the ten-year trend, with the balance being more weighted towards single-family development – there were 628 permits issued for single-family units, representing 71% of the total. There were just 255 multifamily permits issued, accounting for the remaining 29%.

Most of the new single-family activity in the city is concentrated in attached townhouse projects, rather than detached single-family units. The largest active projects in Alpharetta are mainly comprised of townhouse units, and most new single-family developments are smaller infill developments, as land for new subdivisions is extremely limited. Recent multifamily activity has been more heavily concentrated in apartment projects and condo projects like Eden at Lakeview and the Maxwell, with some unit additions to senior-living projects, including the second phase of the Village Park Highway 9 project. Detailed information on the housing development pipeline is presented in the next section.



BUILDING PERMIT ACTIVITY IN ALPHARETTA 2014-2024			
Year	Single Family	Multifamily	Total
2010	57	0	57
2011	94	340	434
2012	119	0	119
2013	121	250	371
2014	288	0	288
2015	266	387	653
2016	259	0	259
2017	357	0	357
2018	475	0	475
2019	204	24	228
2020	227	140	367
2021	404	45	449
2022	201	255	456
2023	201	0	201
2024	226	0	226
Total	**3,499**	**1,441**	**4,940**
Shares	*70.8%*	*29.2%*	
Ann'l Average	**233**	**96**	**329**

Source: SOCDS Building Permits Database

SECTION 3: DEVELOPMENT PIPELINE IN ALPHARETTA

This section examines future changes to the city's housing inventory by detailing projects since the last housing study update that were either completed, under construction before and after, or approved through the regulatory process for future development. Since the 2022 update to the housing report, 416 units have been completed according to the City of Alpharetta's reporting of projects delivered, with most of these units characterized as multifamily (the 255-unit Eden at Lakeview project), with significant active living facility units added as well (89 units at Village Park Highway 9's second phase), in addition to townhome and single-family detached units, of which single-family detached units represented the smallest share of recent deliveries.

RECENTLY COMPLETED	Unit Type	Units	Acres	SF	TH/Condo	MF	ALF
Madewell Cumming St	SF	2	1.76	2			
Firefly*	TH	55	7.32		55		
Akunna Court	SF	4	1.84	4			
The 1858*	SF	11	1.64	11			
Village Park (Hwy 9 phase 2)*	ALF	89	4.9				89
Eden Apartments at Lakeview Park*	Apt	255	4.96			255	
Subtotal		**416**	**22.4**	**17**	**55**	**255**	**89**

* Captured in March 3, 2022 data from last report.

The future development pipeline in Alpharetta includes another 2,323 units, of which 1,720 are currently under construction, making Alpharetta's development pipeline relatively heavy despite a relatively low volume of recent deliveries. The under-construction pipeline is very heavily weighted towards townhouses, condominium units and single-family detached units.

There are currently 17 single-family detached projects under construction and an equal number of townhome and condominium projects, containing a total of 497 single-family detached homes and 943 townhouse or condo units; this represents 29% and 55% respectively of all units under construction in the City. The remaining 280 units include a single 280-unit apartment development that is planned to be integrated into a larger residential project called Continuum which will feature 98 townhome or condo units.

UNDER CONSTRUCTION	Unit Type	Units	Acres	SF	TH/Condo	MF	ALF
Mayfair on Haynes	SF	27	4.4	27	0	0	0
Continuum	Apt/TH	378	51.9	0	98	280	0
172/182 Marietta St	SF	2	1.3	2	0	0	0
350 Brady Place	SF	1	0.3	1	0	0	0
TPG Brookside	C	160	9.9	0	160	0	0
Verdant fka Charlotte Dr DRB Group	SF	42	36.8	42	0	0	0
Fernleaf Park	SF	147	19.3	147	0	0	0
Park Walke II	TH	34	3.4	0	34	0	0
Byers Park fka TPG 2325 Old Milton Pkwy	TH	24	4.9	0	24	0	0
Park Walke I	SF	19	2.2	19	0	0	0
Iveybrooke fka TPG Davis Dr	TH	85	8.6	0	85	0	0
Mayfield Estates	SF	5	5.7	5	0	0	0
Windward Park META*	TH/C	230	47.7	0	230	0	0
The Gathering*	SF/TH	179	24.8	39	140	0	0
82/92 Thompson St	C	5	1.1	0	5	0	0
North Fulton Pharmacy	TH	8	1.3	0	8	0	0
Emberly fka Mid Broadwell Tract Toll Brothers	SF/TH	42	10.8	14	28	0	0
Wills Overlook	SF/TH	17	2.2	1	16	0	0
The Bridges Madewell	SF	6	7.8	6	0	0	0
116/126 North Main St	C	4	1.4	0	4	0	0
Hawthorn fka Toll Brother Kimball Bridge Rd	SF	41	22.8	41	0	0	0
North Main St Townhomes	TH	16	2.3	0	16	0	0
Marigold	SF	11	7.5	11	0	0	0
Kingsley fka 296/304 Thompson Street*	SF/TH	17	2.4	11	6	0	0
Hudson Park*	SF	17	2.0	17	0	0	0
Ronara Villas fka Alpha at Main*	SF	11	1.6	11	0	0	0
Pinecone*	SF	90	13.9	90	0	0	0
The Residences at Northwinds Summit*	C	18	0.9	0	18	0	0
Lakeview Park Townhomes*	TH	60	4.6	0	60	0	0
Mayfair on Main*	SF/TH	24	2.2	13	11	0	0
Subtotal		**1,720**	**306**	**497**	**943**	**280**	**0**

* Captured in March 3, 2022 data from last report.

The remaining 603 units in the development pipeline have been approved by the City of Alpharetta but are not yet under construction. More than half of these units (335) are multifamily units, with another 40% (242) of the approved units representing townhome or condominium units.

APPROVED	Unit Type	Units	Acres	SF	TH/Condo	MF	ALF
Wooten Tract Townhomes	TH	67	10.2	0	67	0	0
12725/12735 Providence Rd	SF	7	3.25	7	0	0	0
Portman Brookside	Apt/TH	410	19.68	0	75	335	0
Hampton Hall Southvine Homes	SF	9	5.05	9	0	0	0
55 Canton	C	36	1.02	0	36	0	0
152 Marietta St	C	1	0.45	0	1	0	0
Ocee Place	SF	2	2.49	2	0	0	0
10355 Waters Rd	SF	2	1.5	2	0	0	0
306 Thompson St	SF	2	1.15	2	0	0	0
Mid Broadwell Parc*	SF	4	2.17	4	0	0	0
Kimball Bridge Condos	C	8	1.01	0	8	0	0
South of Wills Park	TH	55	5.54	0	55	0	0
Subtotal		**603**	**53.5**	**26**	**242**	**335**	**0**
TOTALS**		**2,739**	**381.74**	**540**	**1,240**	**870**	**89**

Source: City of Alpharetta

* Captured in March 3, 2022 data from last report.

**Represents recently delivered and pipeline

The 2,323 units in the pipeline are expected to add 2,207 households to the city, assuming a standard 5% vacancy rate. Assuming these units are fully absorbed over a 5-year period, this would represent a compound annual growth rate (CAGR) of 7%. This growth represents a slight decrease relative to the rate at which the City grew between 2015 and 2023 (8% CAGR), however the annual growth rate of 1% is completely aligned with historic growth patterns.

By applying the expected owner/renter shares of new developments discussed in Section 2, the following breakdown of the units currently in the development pipeline was calculated:

- 1,482 owner occupied units (64% of pipeline)
- 841 renter occupied units (36% of pipeline)

The table below shows the impacts of the buildout of the pipeline on the city's housing situation. By 2030, assuming all units are built and occupied as expected, the city's owner/renter balance would shift from its current level of 68/32 to 67/33.

HOUSING STOCK AND OCCUPANCY TRENDS IN ALPHARETTA, 2020-Pipeline Buildout

	2020		2023		Pipeline Buildout	
	Number	%	Number	%	Number	%
Total Housing Units	25,457		25,994		27,780	
Vacant Units	*1,499*	*5.9%*	*1,184*	*4.6%*	*1,615*	*5.8%*
All Occupied Units	23,958	94.1%	24,810	95.4%	26,165	94.2%
Owner Occupied	*16,224*	*67.7%*	*16,872*	*68.0%*	*17,632*	*67.4%*
Renter Occupied	*7,734*	*32.3%*	*7,938*	*32.0%*	*8,533*	*32.6%*

Source: KB Advisory Group, City of Alpharetta, U.S. Census, 2020, 2023 American Community Survey

SECTION 4: IMPACT OF FUTURE RENTAL GROWTH ON INVENTORY

This section examines future housing demand in Alpharetta based on projections of population and household growth over the next five years and provides a range of rental housing demand based on a range of assumptions regarding future household growth rates and potential future ratios of renter and owner housing. The analysis in this section provides insight into how rental demand and inventory are likely to change through 2030.

RENTER TO OWNER RATIO IN THE REGION

Presented below is an analysis of the ratio between renter and owner housing in portions of the Atlanta region that appear to be most comparable with Alpharetta. This analysis examines the ratio of renter and owner housing units in the combined municipalities in North Fulton County and for the North Atlanta Metro area, which we defined as the entire counties of Cherokee and Forsyth, and North Fulton County (the portion of the county north of Sandy Springs), and East Cobb (the unincorporated area of Cobb County located between Marietta and the Fulton County line).

RENTER AND OWNER RATIOS: NORTH ATLANTA METRO, 2023

	Alpharetta	North Fulton	Cherokee	East Cobb	Forsyth	North Metro
Households	26,224	104,854	102,811	63,310	90,635	361,610
Owner Occupied	17,507	76,780	81,590	48,913	76,067	283,350
Renter Occupied	8,717	28,074	21,221	14,397	14,568	78,260
Owner %	67%	73%	79%	77%	84%	78%
Renter %	33%	27%	21%	23%	16%	22%

Source: U.S. Census, American Community Survey, 2023

Although its share of renters has declined recently, Alpharetta continues to have a higher share of renter-occupied housing than surrounding communities in the north metro area. The city's 33% renter share as of 2023 exceeds the overall renter share of 27% for all of North Fulton County (including Johns Creek, Milton, Mountain Park, and Roswell). The renter shares are even lower in the neighboring areas of Cherokee County (21%), East Cobb County (23%), and Forsyth County (16%). The overall renter share for these North Metro area communities is 22%.

POPULATION AND HOUSING GROWTH RATES

Presented in the following exhibit is a summary of historical and projected population and household growth for Alpharetta from 2010 to 2030. As shown in the exhibit below, the population of the City of Alpharetta grew at a .7% compound average annual growth rate (CAGR) from 2010 to 2025, with significantly faster growth from 2010-202 than from 2020-2025. During the same 25-year period, the city's household count increased at a comparable rate of .6%, suggesting that household size and formation has remained relatively stable across the period.

For the last update of this report, forecasts by Environics Analytics, a third-party data provider, anticipated that both population and household growth would slow over the next 5 years (2021-2026). Environics projected that the city's population would grow at a 1.2% CAGR to 2026 and its household county will increase by 1.3% annually. If these forecasts had been accurate, the city would have nearly 28,009 households and 72,292 residents today. The most recent set of data from Environics Analytics reveals that the City grew somewhat slower than expected and that the slow down that was forecasted was actually more dramatic than previously modeled, a trend

which the data provider is predicting will only continue between now and 2030, bringing the City's population and household count to a point lower than previously forecasted for 2026.

POPULATION AND HOUSING PROJECTIONS 2010-2030		
	Alpharetta	
	Population	Households
2010	56,872	21,685
2020	66,143	24,739
2025 Estimate	66,342	24,803
CAGR	0.7%	0.6%
2030 Projection	67,107	25,149
CAGR	0.2%	0.3%

Source: Environics Analytics/KB Advisory Group

While each of these datasets is useful for providing context, using either method to predict the number of households in 2030 still falls short of the actual number of expected households based on the current development pipeline. The future pipeline of 2,323 units, even with an assumed vacancy rate of 5%, would still add 2,207 households to the city. This compares with 346 new households using Environics' growth rate and 933 using the historic growth rate. For this reason, our forecasts are based on the pipeline as it exists today.

While additional development that is not already in the development pipeline could add more inventory, it is also possible that some of the pipeline projects will not be developed by 2030. Our assumption is therefore that the existing pipeline provides a reasonable estimate of how much, and what types, of new housing are likely to be built in the next 5 years.

Starting with these forecasts, we then applied estimates of the highest and lowest possible scenarios of how much of the new housing stock would be renter occupied. These shares were derived from two datasets discussed earlier in the report.

- **The expected renter-owner balance of the current pipeline** – An estimated 36% of the current development pipeline is expected to become renter occupied units. This includes all units in multifamily rental developments, as well as a percentage of new single-family, townhome, and condominium units.

- **Assumed future rental preference at the north metro rental ratio** – Data from the north metro area shows an overall proportion of 22% renter households across the area. Given the limited number of development sites in the city and the very high cost of land, though, Alpharetta's renter share is highly unlikely to decline to anywhere near this level.

These shares represent the extreme cases of how the owner-renter balance may shift in Alpharetta in the coming years. The following table illustrates how these alternatives would affect the city's tenure balance.

IMPACT OF ALTERNATIVE GROWTH RATES AND TENURE PATTERNS, 2023-2030					
	Owner Occupied		Renter Occupied		Total
Current Pipeline Scenario					
Existing Housing Stock, 2023	16,872	68%	7,938	32%	24,810
Addtions from Current Pipeline	1,482	64%	841	36%	2,323
Future Housing Stock, Including Pipeline	18,354	68%	8,779	32%	27,133
North Metro Average Scenario					
Existing Housing Stock, 2023	16,872	68%	7,938	32%	24,810
New Construction	1,820	78%	503	22%	2,323
Future Housing Stock	18,692	69%	8,441	31%	27,133

Source: KB Advisory Group

In the first scenario, Alpharetta would add 1,482 owner occupied units and 841 rental units and over the next 5 years, which would leave the City's current owner-renter balance largely undisturbed. In the second scenario, the city would add 1,820 owner occupied units and just 503 rental units. This would shift the owner-renter balance to 69/31. Although these two scenarios present very different outcomes for the new housing stock, the overall effect on the citywide tenure balance would still be minor. It is clear from this analysis that year-by-year variations in the tenure mix of new housing should not be of concern; rather it is long-range trends that need to be in balance.

The city's 2021 Comprehensive Plan update extended the existing goal of having 32% of the overall housing inventory be rental housing. This long-range goal would be consistent with historical renter ratios in the city and would help fulfill the ongoing market needs for rental housing that are not being met elsewhere in the North Atlanta metro region.

This goal could be achieved with rental housing additions of 149 units per year, which is derived from applying the 32% ratios to the average number of permits issued per year from 2014-2024 and the expected number of permits per year based on the current pipeline. Calculations are as follows:

- Total Permits issued 2014-2024: 3,959 units
- Average Permits issued 2014-2024: 360 units
- Expected Permits per Year, 2026-2030: 465 units
- Targeted Rental Unit Proportion at 32%: 149 units annually

The total number of targeted rental unit permits should be adjusted every five years to reflect recent trends in total permitting activity. Permits for new units to be created on the site of existing rental apartments could be exempted from this annual limitation as an incentive to redevelop older complexes.

Going forward, the development pressure faced by Alpharetta is not likely to abate in the near future. The Atlanta metro area continues to add tens of thousands of jobs each year, and Alpharetta has maintained its status as one of the most desirable communities in the region. Several factors will continue to drive housing demand in the city over the next few years, including:

- The tremendous growth in the employment base in North Fulton generally and Alpharetta in particular.
- The emergence of Avalon and downtown Alpharetta as major regional shopping, dining, and tourism destinations.

- The expected redevelopment of North Point Mall and surrounding properties along North Point Parkway.
- The development of the Alpha Loop and the connector trail to the Big Creek Greenway.
- The planned extension of high-capacity transit service along GA-400 from the North Springs MARTA station to Alpharetta.

There is no reason to expect that demand for housing in Alpharetta will slow over the next few years. The slow growth that has occurred over the past several years since the pandemic is likely more reflective of:

- Poor macroeconomic development and lending conditions across the broader economy
- Narrowing opportunities for greenfield development within the City of Alpharetta
- Alpharetta's becoming one of the premier North Fulton communities in recent year, which has made living in Alpharetta a more price-prohibitive proposition for many.

These factors likely have played a larger role in curbing growth within the City in recent years than reduced demand for living in Alpharetta. The major constraints on growth in the City will continue to be the limited supply of land and sites for new development and the rising costs of land acquisition and construction. These factors are likely to continue to drive up sale prices and rental rates, which will limit the pool of households that can afford to live in the city. The affordability issue is the most likely factor that could limit new housing development going forward.

SECTION 5: SENIOR RENTAL HOUSING IN ALPHARETTA

This section of the report focuses on an important segment of the overall rental housing market in Alpharetta, senior rental housing. Improved health, longer lifespans, and generational trends means that the share of the city's population 55 or older is expected to increase significantly in the coming decades.

THE GROWING SENIOR POPULATION IN ALPHARETTA

Demographic trends in Alpharetta point to strong growth in the city's senior population. As shown in the exhibit below, the number of seniors 65+ in Alpharetta already increased by nearly 3,000 from 2010 to 2020 and increased by another 2,242 residents in just the three-year period between 2020 and 2023. The annual growth rate of the senior population between 2010 and 2020 was 5.9%, nearly triple the overall population growth rate of 2.0% during this period. The age 55+ population increased at a similar rate of 5.7% annually from 2010 to 2020.

Since 2020, the annual growth rate of Alpharetta's senior population has only continued to grow more aggressively, reflecting the reality that many older households have access to greater resources and are able to afford homes in the City. Since 2020, the senior population has grown by 10% annually, with those 55-years and older growing slightly less rapidly at roughly 8% annually.

As a result of this growth, the senior population's share of the city's population has increased significantly since 2010 and 2020. During the past fifteen years, the 55+ population share increased from 17% to 30% of all city residents and the 65+ share increased from 7% to 13%. Looking ahead, the annual growth rate is expected to accelerate somewhat, and is forecasted to grow to 12% and 11% respectively through 2030, more than five times the overall forecasted growth rate of 2.6%. If these forecasts prove accurate, the 55+ population would account for 47% and the 65+ population would represent 24% of all Alpharetta residents by 2030. These trends are expected to continue the demographic "push" that will drive further demand for senior housing in the local market.

SENIOR POPULATION IN ALPHARETTA, 2010-2025

					Forecasted	
	2010	2020	2023	3-Year Ann % Chg	2030	Ann % Chg
Population Counts						
Total Population	54,723	66,566	67,054	0.2%	75,560	2.6%
Population 55+	9,212	16,104	20,158	7.8%	35,380	11.9%
Population 65+	3,811	6,750	8,992	10.0%	18,350	10.7%
Population Shares						
Percent 55+	16.8%	24.2%	30.1%		46.8%	
Percent 65+	7.0%	10.1%	13.4%		24.3%	

Source: U.S. Census American Community Survey 2010, 2020, 2023

As with other households in the city, seniors tend to be an increasingly affluent group, which speaks well to their ability to afford the cost of retirement and senior living. The share of households headed by a person age 65+ with annual incomes in excess of $150,000 nearly doubled from 2015 to 2020, increasing from 9.3% to 18.3%, a group which continued to grow in

share between 2020 and 2023 up to 23.2%. On the other end of the spectrum, there was reported growth in the share of seniors earning less than $35,000 annually, which is a widely observed phenomenon among this age group, where, upon retiring, their actual income decreases significantly, but household wealth and assets remain high and are ultimately uncaptured by this data point. Every other income group decreased in share besides those earning $75,000 to $100,000 annually.

INCOME OF AGE 65+ HOUSEHOLDS, 2015-2030				
	2015	2020	2023	2030
Less than $35,000	40.6%	22.8%	29.0%	34.3%
$35,000-49,999	9.9%	12.1%	7.9%	2.2%
$50,000-74,999	15.3%	24.6%	16.9%	4.3%
$75,000-99,999	12.8%	9.1%	12.3%	13.4%
$100,000-149,999	12.1%	13.2%	10.7%	3.7%
$150,000 and Up	9.3%	18.3%	23.2%	42.1%

Source: U.S. Census ACS, 2010, 2020, 2023; KB Advisory Group

Over the next few years, the shift towards upper-income seniors is expected to continue, with the most significant share of senior households earning $150,000 or more annually come 2030. This growth represents an even more dramatic extension of the historic trend, with the potential of high-income senior households to account for up to 42% of senior households in the City by 2030.

INVENTORY OF SENIOR HOUSING

The senior housing marketplace in Alpharetta was examined to determine the scale of the senior housing inventory in the city and what is in the pipeline for future development. Since the 2022 housing study, the Village Park Milton development completed its second phase, adding 89 of assisted living and memory care units to the city's inventory. As of September 2025, there were 14 senior housing communities in Alpharetta, containing a total of 1,740 units.

Typically, the senior developments offer a mix of independent living, assisted living, and memory care in their complexes. Alpharetta currently does not have any facilities dedicated solely to continuing or nursing care. Recent developments such as Village Park Alpharetta and Village Park Milton have also included detached cottage units that provide a more private (and more expensive) housing option within a larger community.

Beyond the existing supply, there are no additional senior living units in the development pipeline

A key trend we are continuing to witness in the metro area is the phenomenon of seniors not only looking to downsize from larger family homes to smaller floorplans but parents of Gen X and Baby Boomer households moving to or staying in metro Atlanta to be near their middle-aged or older children. This is creating even more demand for senior housing near affluent areas with a high presence of these households, like Alpharetta. We are continuing to see a building boom in a wide range of senior housing options throughout the northern suburbs, especially in Gwinnett, Cobb, Cherokee, North Fulton, Forsyth and Hall Counties. As Alpharetta's senior population continues to grow, it will be important for the City to keep an eye on its senior housing needs and to redevelop the pipeline of permitted senior housing in a way that allows Alpharetta to remain

competitive while also allowing long-term residents to age within the community that they have built their lives in.

ALPHARETTA SENIOR RENTAL DEVELOPMENTS (AS OF SEPTEMBER 2025)					
Property Name	Address	Care Class	Year Open	Units	Occ %
Village Park Milton (Phase 2)	555 Wills Rd	Assisted Living	2023	89	
Village Park Milton	555 Wills Rd	Assisted Living Memory Care	2020	130	
Mansions at Alpharetta	3675 Old Milton Pkwy	Independent Living Assisted Living	2017	178	89.4%
Autumn Leaves of Windward	3300 Webb Bridge Rd	Nursing Care Memory Care	2017	50	
Inspired Living at Alpharetta	11450 Morris Rd	Assisted Living Memory Care	2017	128	59.7%
Village Park Alpharetta	12300 Morris Rd	Independent Living Assisted Living	2017/ 2020	206	96.9%
Addington Place of Alpharetta	762 Main St	Assisted Living Memory Care	2013	79	
Cottonwood Estates	255 Vaughn Dr	Independent Living	2013	120	93.1%
Mayfield Oaks	143 Mayfield Rd	Assisted Living	2013	13	
Atria North Point	100 Somerby Dr	Assisted Living Memory Care	2008	282	
Emblem Alpharetta	1000 Fanfare Way	Active Adult	2008	210	96.1%
Providence Senior Living	12775 Providence Rd	Assisted Living Memory Care	2007	8	
Alto Senior Living	4125 N Point Pkwy	Assisted Living Memory Care	1999	71	
Morningside of Alpharetta	253 N Main St	Assisted Living Memory Care	1997	76	
Dogwood Square	555 Janis Ln	Low-Income Independent Living	1971	100	
		TOTAL UNITS:		**1,740**	

Source: City of Alpharetta; CoStar

The term senior housing covers a wide range of housing products as shown in the chart below.

	Target Population	Services Offered
Types of Senior Rental Housing		
Active Adult Rental Housing	Active Adults 60 to 75 years	Rental housing, standard apartment amenities, no personal services provided
Independent Living Senior Housing	Seniors aged 65- 75	Rental housing standard amenities, meal plan, transportation
Assisted Living Senior Housing	Seniors aged 70+	Same as independent plus a personal service like assistance bathing, pill monitoring, etc.
Memory/Dementia Care	Seniors aged 65+, need based	Same as assisted with higher level of care/monitoring for those unable to live independently
Continuing Care Retirement Center	Seniors 65+	Range of unit types, amenities, and services as resident ages in place
Nursing Care	Seniors 65+, need based	Smaller units, care focused

The various senior housing options provide a series of steps from independent living, which is focused solely in the provision of housing, through a range of services, personal care and medical support until you reach nursing care. Each of these differentiated products in the senior housing market appeals to its own unique market segment, and as the household ages it typically moves up the services/care dimension. The main types of senior housing in the market today include:

Active Adult Rental Housing – This is newest product offering and targets 55+ residents who are seeking a modern rental apartment with full amenities but do not want any typical senior housing services like a meal plan or transportation. They also do not want any children present on a permanent basis and are therefore age restricted to the degree allowed by the Fair Housing Law. This is the hottest area in senior housing with Walton at Bluegrass, just north of Alpharetta, an example of this type of development.

Independent Living Senior Housing – These units look much like conventional rental apartments to allow its residents to live independently but additional services of offered, typically a meal plan and a van for transportation to shopping and services. This product has recently expanded to include detached rental cottages as well, that offer the same services as the apartments but greater privacy; these cottage units typically rent at a significant premium above independent apartments. The target age profile is typically 65 to 75 years old.

Assisted Living Senior Housing – These developments have individual units with most of the amenities of active adult and independent living but often are slightly smaller is size. In addition to the meal plan and transportation additional activities are provided as is assistance with managing one or more care functions such as assistance bathing, reminders on taking medication and additional activities and programs for the residents. The residents tend to be in their 70's and have faced some health challenge or the loss of a spouse that makes independent living less tenable.

Memory/Dementia Care – This is where the transition from provision of shelter to provision of services is most evident. The residents lack the ability to live independently, even with assistance and a higher level of care needs to be provided.

Continuing Care Retirement Community – This is where some or all of the previous options are available on one campus, with residents moving through the various options as the age and become more infirmed. Sometimes requires a major upfront endowment, and often church affiliated.

Nursing Care – In these facilities the primary purpose is the provision of health-related services and the residential component is secondary with smaller units and fewer unit amenities. The key motivation in these facilities is the on-going care and maintenance of the residents who often face multiple health challenges.

Every reasonable effort has been made to ensure that the data developed in this assignment reflect the most accurate and timely information possible and is believed to be reliable. This consulting assignment was based on estimates, assumptions and other information developed by KB Advisory Group ("KB") from its independent research efforts, general industry knowledge and consultations with the client for this assignment and its representatives. No responsibility is assumed for inaccuracies in reporting by the client, its agents or representatives or any other data source used in preparing or presenting this study.

The research and reports are based on information that is current as of the date of the report. KB assumes no responsibility to update the information after the date of the report. The research may contain prospective financial information, estimates or opinions that represent our view of reasonable expectations at a particular point in time, but such information, estimates or opinions are not offered as predictions or as assurances that a particular outcome will occur. Actual results achieved during the period covered by our prospective analysis may vary from those described on our research and report and variations may be material. Therefore, nor warranty or representation is made by KB that any of the projected values or results contained in the work product from this assignment will actually be achieved.



Alpharetta Rental Housing Study Update

Determining the current and future mix of renter and owner housing in the city

Presented for:

THE CITY OF ALPHARETTA GEORGIA

Presented by:

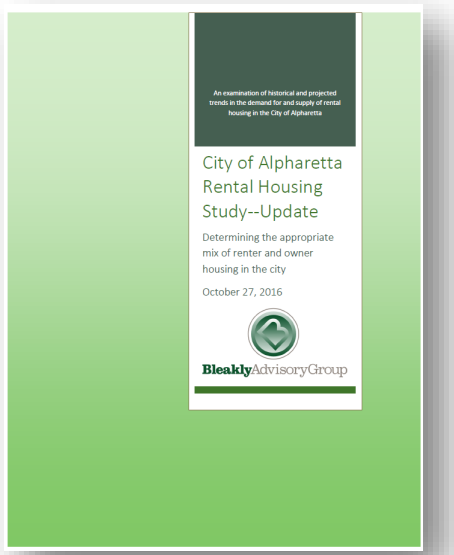
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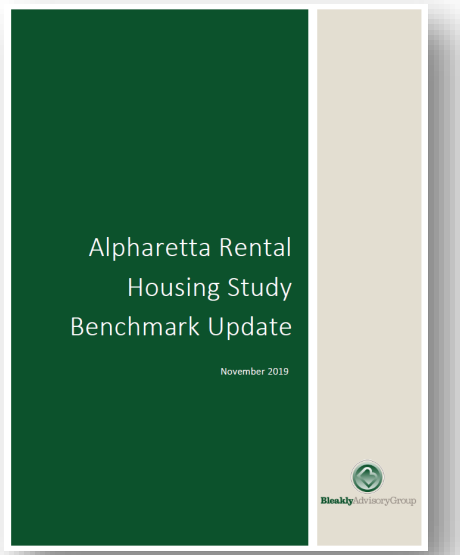
Alpharetta Housing: Where We Are and How We Got Here

Assignment:

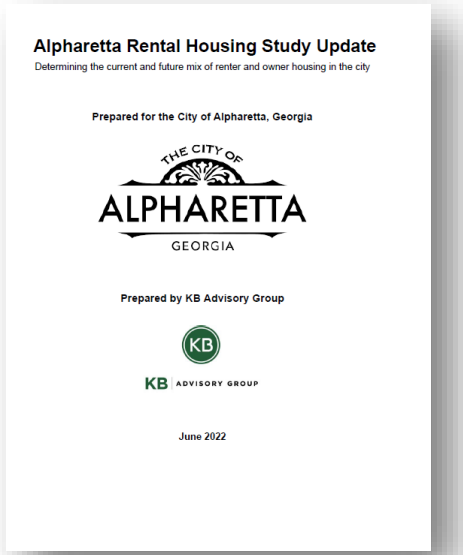
Data-driven assessment of current housing conditions, development trends, and long-term housing balance



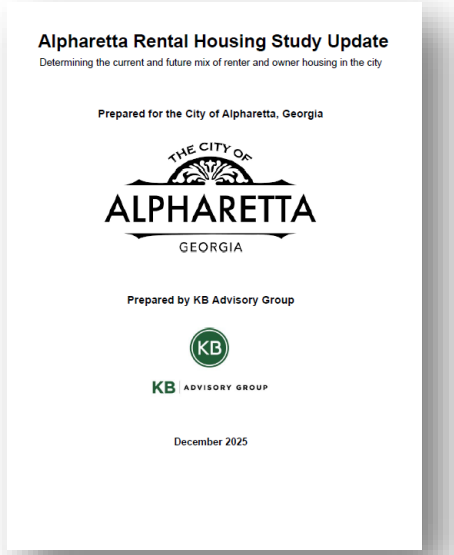
2016



2019



2022



2025

The Evolving Housing Mix

City Target: ~32% Rental Housing

Policy 2 in the Housing Element of Horizon 2040:

"Maintain a balance between 'owner-occupied and 'renter-occupied' in Alpharetta such that at least 68% of the housing stock is 'owner-occupied'."

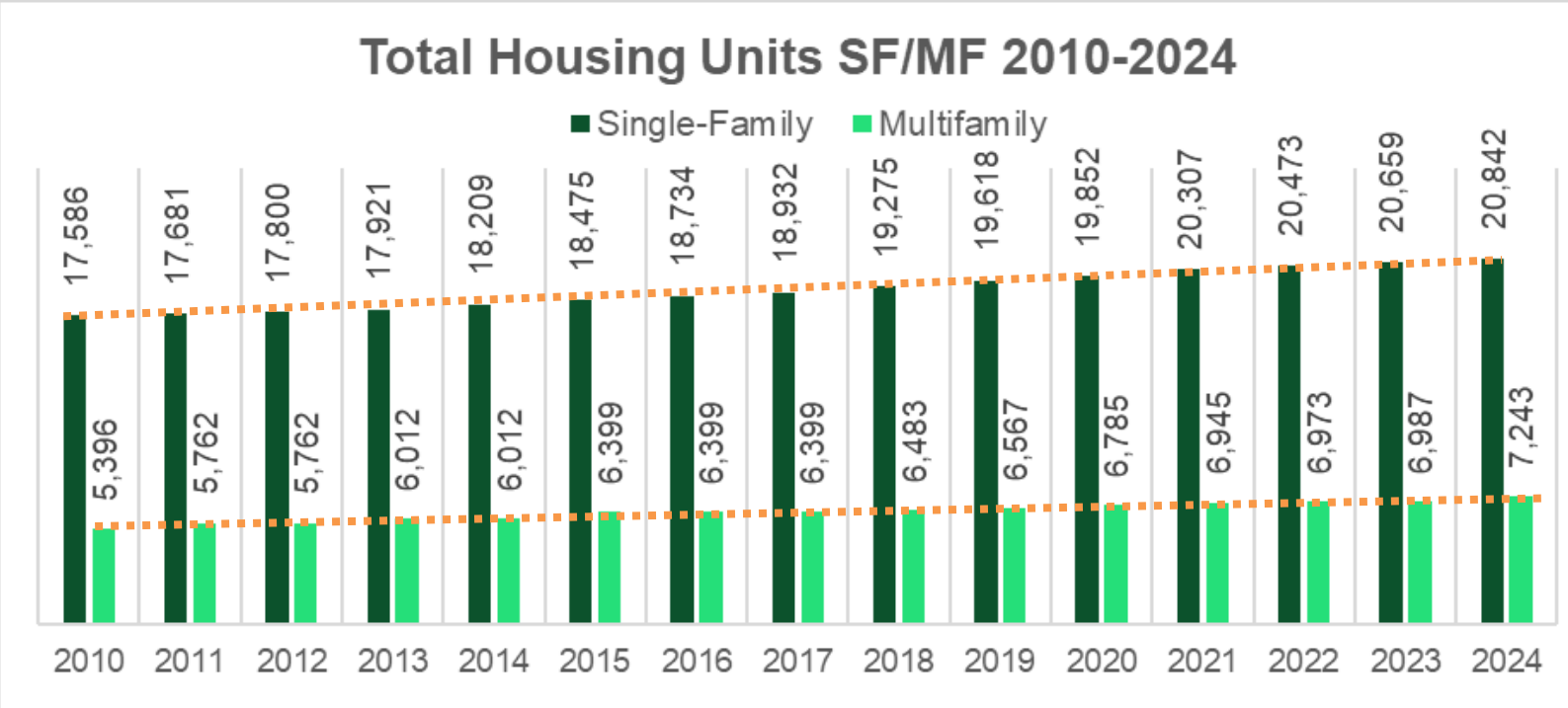
Year	Owner Share	Findings
2016	~64%	Above target
2019	~64%	Still above target
2022	~68%	At target
2025	~68%	Holding at target

The Evolving Housing Mix

Renter share ↓

Ownership growing faster

Renter households ↑



	Growth 2015-2020		Growth 2020-2023	
	Total	%	Total	%
Population	4,512	7.3%	(211)	-0.3%
Households	1,134	5.0%	852	3.4%
Owner Households	1,937	13.6%	648	3.8%
Renter Households	(803)	-9.4%	204	2.6%

What's Driving the Change in the Housing Mix

10-Year Trends: Household IncomeAge

Renter base has fewer children and fewer larger households

Younger (< 35) and Older (>64) households flocking to rentals

"Mid-Career" households flocking to ownership

	2020-2023 Change	
	All HHs	Rental HHs
Number of Households	852	204
Household Size		
1-person	0.3%	2.0%
2-person	0.2%	4.4%
3-person +	-0.6%	-6.4%
Household Type		
Family Households	-0.6%	-2.2%
Married Couples	0.5%	3.6%
Single Parent-Female	-0.9%	-4.4%
Single Parent-Male	-0.1%	-1.4%
Non-Family Households	-28.1%	2.2%
Singles		2.0%
2 or more Persons	0.2%	0.2%
Children Present		
With Children	-6.2%	-2.1%
Without Children	6.2%	2.1%
Age of Householder (Married Couples)		
Householder 15-34	0.3%	6.5%
Householder 35-64	-2.8%	-16.4%
Householder 65+	2.5%	9.9%

What's Driving the Change in the Housing Mix

10-Year Trends: Household Income

Growth at the ends of the income spectrum
+4% renters earning under $50K
+9% renters earning over $100K

Decline in middle-income renters
-13% renters earning $50K–$100K

Overall, renter income growth is higher than owners

Middle-income households are shrinking citywide, suggesting limited housing options for this group

DISTRIBUTION OF HOUSEHOLD INCOME IN ALPHARETTA, 2023

Household Income	Renter %	Renter Number	Owner %	Owner Number	% Renter
Less than $25,000	18.8%	1,493	3.1%	516	**74.3%**
$25,000-$49,999	19.5%	1,550	5.7%	966	**61.6%**
$50,000-$74,999	11.6%	922	6.8%	1,142	**44.7%**
$75,000-$99,999	14.5%	1,153	7.1%	1,202	**49.0%**
$100,000-$149,999	19.9%	1,581	12.4%	2,084	**43.1%**
$150,000+	15.6%	1,239	65.0%	10,962	**10.2%**
	100.0%	**7,938**	**100.0%**	**16,872**	

Median Household Income		
2020	$71,920	$163,350
2023	$88,432	$179,602
Annual % Change	4.2%	1.9%

Source: U.S. Census, 2020 and 2023 American Community Survey

How the Housing Market is Performing

10-Year Trends: Housing Supply

Demand
Low vacancy (~5%)

Pricing
Rents up ~90% since 2010
Moderating since 2022

Shifts
Single-family renter share dropped from 12% to 5%

Supply
Pipeline active (~2,300 units)

CHANGE IN OWNER & RENTER SHARES BY UNIT TYPE, 2015-2023

	2015		2020		2023	
	Owner %	Renter %	Owner %	Renter %	Owner %	Renter %
Single-Family Detached	88.3%	11.7%	93.8%	6.2%	94.9%	5.1%
Single-Family Attached	68.7%	31.3%	71.8%	28.2%	80.0%	20.0%
All Multifamily	4.8%	95.2%	8.6%	91.4%	6.1%	93.9%
2-4 Units	*10.8%*	*89.2%*	*25.2%*	*74.8%*	*6.2%*	*93.8%*
5-9 Units	*5.1%*	*94.9%*	*19.4%*	*80.6%*	*19.4%*	*80.6%*
10+ Units	*4.0%*	*96.0%*	*1.2%*	*98.8%*	*3.4%*	*96.6%*
Mobile Home/Other	28.1%	71.9%	87.4%	12.6%	0.0%	100.0%

Source: U.S. Census, American Community Survey 2015, 2020, 2023

→ The current pipeline is expected to maintain the City's housing balance.

Key Takeaways



The City has added rental housing, but added ownership at a faster rate, while shifting rental demand into apartments

Questions?

Geoff Koski
geoff@kbagroup.com
404.845.3550

STAFF REPORT

Department: Finance
Submitted By: Shawn Mitchell
Meeting Date: May 4, 2026

AGENDA ITEM:

Fiscal Year 2027 Budget
Discussion of the upcoming FY 2027 budget.

STAFF RECOMMENDATION:

The purpose of this workshop is to provide an opportunity for dialogue and feedback from the City Council regarding the Fiscal Year 2027 Budget including operating and capital initiatives.

BUDGET & PROCUREMENT:

BUDGETED ITEM: NO
FISCAL IMPACT: YES
INCLUDED IN CURRENT FY CPTL BUDGET: NO
INCLUDED IN CURRENT FY OPRT. BUDGET: NO
TOTAL PROJECT COST:
APPROPRIATIONS:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

EXTERNAL FUNDING SOURCES:

ACCOUNT TITLE/NUMBER	DOLLAR AMOUNT

ITEM DESCRIPTION:

The purpose of this workshop is to provide an opportunity for dialogue and feedback from the City Council regarding the Fiscal Year 2027 Budget including operating and capital initiatives. The recommendations are the result of a collaborative process involving our departmental leadership that included multiple budget work sessions. Department Directors are present to discuss their recommendations and to allow for a question/answer dialogue. The FY 2027 Budget is in draft form only.

The FY 2027 Budget was distributed electronically to the City Council on April 29, 2026, and is available on the City's website as a downloadable pdf and available for filtering/analysis through the City's financial transparency sites powered by ClearGov (FY 2027 budget as well as historical budget/actual revenue/expenditure trend data) and OpenGov (FY 2027 budget line-item detail).

An additional City Council Budget Workshop is tentatively scheduled for May 18, 2026.

Public Hearings and City Council action on the FY 2027 Budget and Millage Levy are tentatively scheduled for June 1, 2026 (6:30pm) and June 15, 2026 (one meeting at 11:30am and a final meeting at 6:30pm).

ALTERNATIVES:

ATTACHMENTS:

1. FY 2027 GFOA Budget (5.4.26)

Operating and Capital Budget for Fiscal Year 2027

July 1, 2026 through June 30, 2027

Budget Overview
pages 15-26











Capital Investment
pages 192-244

Citywide Budget Review
pages 80-89

City of Alpharetta, GA

Prepared by:
Finance Department
2 Park Plaza
Alpharetta, GA 30009
Phone (678) 297-6094
Fax (678) 297-6063

Recommended Annual Operating & Capital Budget

for Fiscal Year 2027

(July 1, 2026 through June 30, 2027)

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Mayor and City Council

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CITY COUNCIL (POST 1)



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CITY COUNCIL (POST 2)



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DOUGLAS DERITO
CITY COUNCIL (POST 3)



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JIM GILVIN
MAYOR



JGilvin@alpharetta.ga.us

Mission Statement

TO MAKE A POSITIVE DIFFERENCE in the community by efficiently managing public resources and providing effective services and leadership that exceed the expectations of our citizens.

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CITY COUNCIL (POST 4)



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FERGAL BRADY
CITY COUNCIL (POST 5)



FBrady@alpharetta.ga.us

DAN MERKEL
CITY COUNCIL (POST 6)



DMerkel@alpharetta.ga.us

VISION

Vision

Our Community Vision is to advance Alpharetta as a signature City by:



Offering the highest quality of environment for our residents and businesses.



Fostering strong sense of community including safety and security.



Providing a business climate that attracts the top echelon companies.

Our Community Vision serves as the guiding principles for the planning and operation of our city government, and each department structures its mission, goals and objectives to facilitate achievement of our mission. The icons set forth above are used throughout the Budget to identify the link between the city's Community Vision and the goals and objectives of our various departmental activities.

Mission

To make a positive difference in the community by efficiently managing public resources and providing effective services and leadership that exceed the expectations of our citizens.

EXECUTIVE MANAGEMENT TEAM

Executive Management Team

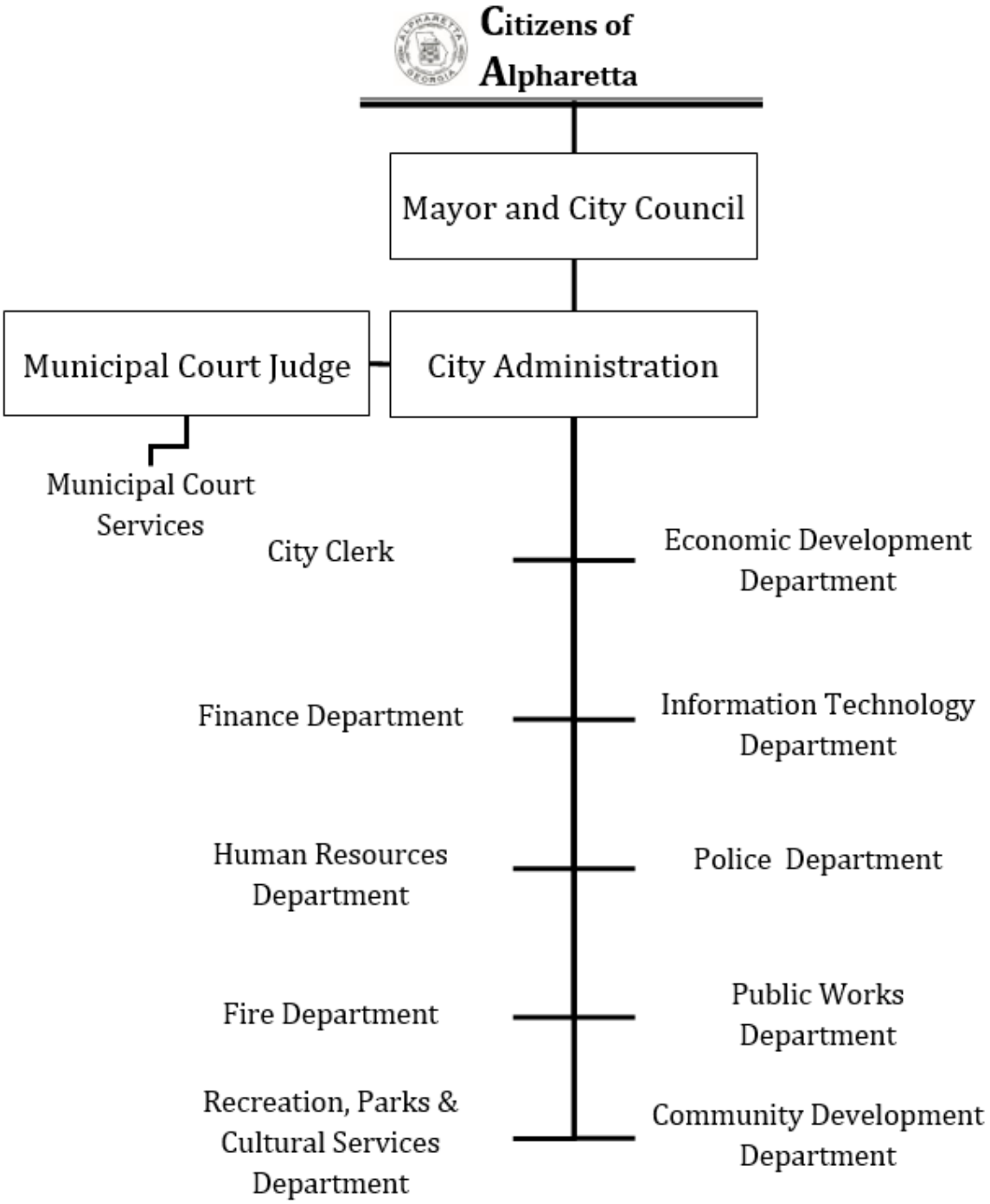
CHRIS LAGERBLOOM
CITY ADMINISTRATOR



CLagerbloom@alpharetta.ga.us

EXECUTIVE STAFF		
John Robison	JRobison@alpharetta.ga.us	Assistant City Administrator
Lauren Shapiro	LShapiro@alpharetta.ga.us	City Clerk
Charlie Jewell	CJewell@alpharetta.ga.us	Director of Economic Development
Thomas G. Harris	THarris@alpharetta.ga.us	Director of Finance
Adam Montgomery	AMontgomery@alpharetta.ga.us	Director of Information Technology
Cris Randall	CRandall@alpharetta.ga.us	Director of Human Resources
Brooke Lappin	BLappin@alpharetta.ga.us	Director of Municipal Court Services
Trent Lindgren	TLindgren@alpharetta.ga.us	Police Chief
Brad Denkinger	BDenkinger@alpharetta.ga.us	Fire Chief
Pete Sewczwicz	PSewczwicz@alpharetta.ga.us	Director of Public Works
Morgan Rodgers	MRodgers@alpharetta.ga.us	Director of Recreation, Parks & Cultural Services
Kathi Cook	KCook@alpharetta.ga.us	Director of Community Development

Organizational Structure



Reader's Guide

The City of Alpharetta Budget is intended to provide information at both the detailed and summary level – information that can be used by both citizens (as an informational tool) and city employees (as an operational tool) alike. Following is a brief description of the information included in each section of this document.

Introduction and Overview

Transmittal Letter

Comprehensive introduction to the City's fiscal year 2027 budget.

2027 Annual Action Plan

The City Council Retreat during January 2026 set forth priorities to guide the construction of the FY 2027 budget including operations and capital investment. These priorities were condensed into an Annual Action Plan.

About Alpharetta

Brief history of our City and detail of our governmental structure, Mission, and Vision.

Alpharetta by the Numbers

Demographic, economic, and statistical data of our City.

Financial Structure, Policy, and Process

Financial Accounting Structure

Information on our financial accounting structure including classification (e.g., Governmental vs. Proprietary), descriptions, and a graph of all city funds.

Financial Reporting

Comprehensive listing of our financial reporting products aimed at ensuring the information needs of the government, authorities, regulatory agencies, and citizens/ stakeholders are met.

Budget Process

Information on our budget basis and structure, budget process, and performance measurement program.

Financial Summaries

Citywide Budget Summaries

Information on the overall (i.e., all appropriated funds) fiscal year 2027 budget. Included are schedules that provide readers with revenue and expenditure summaries from several different perspectives including fund, revenue source, expenditure category, and expenditures by department. A detailed multi-year personnel listing by department is also provided.

General Fund Summary

Information on the fiscal year 2027 budget for the General Fund. Included are schedules that provide readers with revenue and expenditure summaries/narratives from several different perspectives including fund summary; statement of budgetary comparisons (i.e., FY 2026 and FY 2027); statement of revenues, expenditures, and changes in fund balance (FY 2023 through FY 2027); and a detailed narrative of revenue and expenditure trends including historical information.

General Fund Department Summaries

Detailed non-financial and financial information about each department's activities (General Fund only) including departmental mission statement; goals and objectives and how they link with the city's vision/strategic priorities; revenue and expenditure summary and fiscal year 2027 budget narrative; changes in personnel; and performance measurement.

Special Revenue/Enterprise/Internal Service Fund Summaries

Information on the fiscal year 2027 budget for the Special Revenue Funds, Enterprise Fund, and Internal Service Funds. Included are schedules set forth by Fund that provide readers with revenue and expenditure summaries/narratives from several different perspectives including fund summaries; statements of budgetary comparisons (i.e., FY 2026 and FY 2027); and statements of revenues, expenditures, and changes in fund balance (FY 2023 through FY 2027).

Capital and Debt

Capital Project Fund Summaries

Information on our capital budgeting process and funding methodology as well as detailed capital listing (Fiscal Year 2027 as well as a summary 5-Year Capital Plan).

Debt Service Fund Summary

Listing and description of the city's outstanding debt obligations (including debt schedules) and the debt service requirements.

Appendices

Capital Improvement Plan (5-Year)

Alpharetta Convention & Visitors Bureau FY 2027 Budget

Financial Management Policies

Glossary

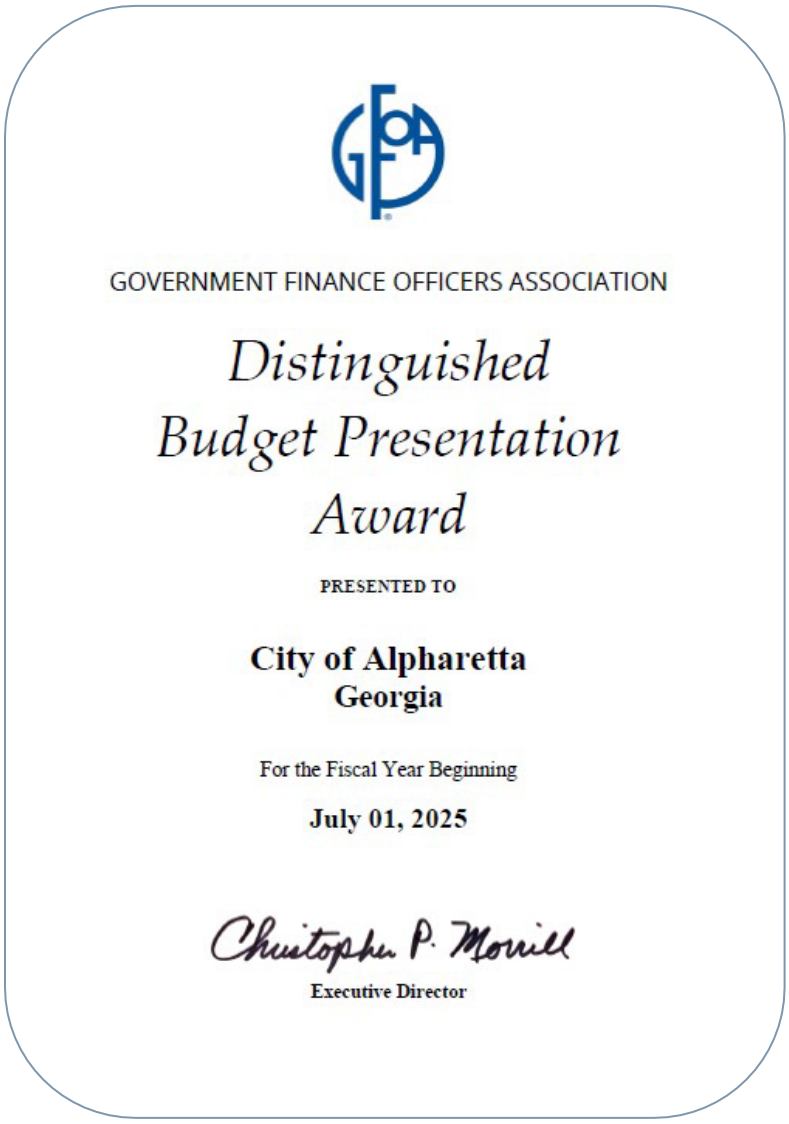
Definition of the many terms used in city government/budget process.

Acronyms and Abbreviations

BRC	Budget Review Committee
ACFR	Annual Comprehensive Financial Report
ACVB	Alpharetta Convention & Visitors Bureau
CF	Carryforward
CIP	Capital Improvement Plan
CPI	Consumer Price Index
CY	Current Year
DCA	Department of Community Affairs (Georgia)
DEA	Drug Enforcement Administration (Federal)
DOR	Department of Revenue (Georgia)
E911	Emergency 911
FT	Full-Time
FTE	Full-Time Equivalent
FY	Fiscal Year
GAO	General Accounting Office (Federal)
GAAP	Generally Accepted Accounting Principles
GAAS	Generally Accepted Auditing Standards
GAGAS	Generally Accepted Governmental Auditing Standards
GASB	Governmental Accounting Standards Board
GDOT	Georgia Department of Transportation
GF	General Fund
GFOA	Government Finance Officers Association
GO Bonds	General Obligation Bonds
HX	Homestead Exemption
IT	Information Technology Department
LOST	Local Option Sales Tax
M&O	Maintenance and Operations
MPP	Minimum Premium Plan
NTV	Net Taxable Value
O.C.G.A.	Official Code of Georgia Annotated
OMB	Office of Management and Budget (Federal)
PAFR	Popular Annual Financial Report
PO	Purchase Order
PT	Part-Time
PY	Prior-Year
SWAT	Special Weapons and Tactics (team)
TV	Taxable Value

THE CITY OF ALPHARETTA GEORGIA

GFOA Distinguished Budget Presentation Award



GOVERNMENT FINANCE OFFICERS ASSOCIATION

Distinguished Budget Presentation Award

PRESENTED TO

City of Alpharetta
Georgia

For the Fiscal Year Beginning

July 01, 2025

Christopher P. Morrill

Executive Director

The Government Finance Officers Association of the United States and Canada (GFOA) presented a Distinguished Budget Presentation Award to the City of Alpharetta, Georgia for its annual budget for the fiscal year beginning July 1, 2025. This award is the highest form of recognition in governmental budgeting and Alpharetta's budget received special recognition for Strategic Goals & Strategies. In order to receive this award, a governmental unit must publish a budget document that meets program criteria as a policy document, as an operations guide, as a financial plan, and as a communications device.

This award is valid for a period of one year only. We believe the FY 2027 budget continues to conform to Distinguished Budget Presentation Award program requirements and are submitting it to GFOA to determine its eligibility.

2 PARK PLAZA
ALPHARETTA, GA 30009
PHONE: 678.297.6000
WWW.ALPHARETTA.GA.US

May 4, 2026

To the Mayor, City Council, and Citizens of Alpharetta:

We are pleased to present our Recommended Annual Operating and Capital Budget for Fiscal Year 2027 (the "Budget") of the City of Alpharetta, Georgia. Our recommendations are based on direction provided at the City Council Retreat (compiled as the "Annual Action Plan") as well as a thorough review of our current financial status, revenue trends, economic data, and our standard of providing top level service while maintaining our focus on keeping Alpharetta an affordable option for our citizens and stakeholders.

The City's budget for FY 2027 reflects a tightening fiscal reality characterized by a widening gap between revenue growth and operational mandates. While revenues are projected to grow at basic inflationary levels, these gains are outpaced by the accelerating costs of personnel and customer service delivery (e.g. contractual services, software infrastructure, etc.). In response, this budget emphasizes prudent fiscal management, strategic resource allocation, and a commitment to maintaining core services while ensuring long-term financial sustainability.

Today, more than ever, governments need to be nimble to respond to market conditions.

Alpharetta's 2027 budget is focused on City Council priorities (including the 2027 Annual Action Plan) and responding to market conditions in a prudent manner including maintaining a competitive compensation package for our staff and keeping up with market prices from private service providers.

Highlights include:

- Tax-burden reductions for our homeowners in excess of $12.3 million through our annual homestead exemption offerings coupled with the one-time State HTRG grant (see section entitled *Taxpayer Savings* for more information).
- Maintenance of the city's millage rate at 5.750 mills (flat with FY 2026) including funding expanded service levels for our citizenry,

MAYOR
JIM GILVIN

MAYOR PRO TEM
DAN MERKEL

COUNCIL MEMBERS
FERGAL M. BRADY
DOUGLAS J. DERITO
T. KIRK DRISKELL
JOHN HIPES
KATIE REEVES

CITY ADMINISTRATOR
CHRIS LAGERBLOOM

business owners, and stakeholders (*Operating Initiative Requests* section of this document).

- The FY 2027 budget includes expanded service levels within multiple departments and is described in detail under the *Operating Initiative Requests* section of this document.
- Capital investment focused on maintaining and improving city infrastructure and assets ($36.5 million when including potential grant sources) which includes capital investment recommendations of $18.3 million along with reserving sufficient funds to provide flexibility for future prioritized capital investment ($18.2 million) and described in detail under the *Capital Project Fund Summaries* section of this document.
- Continuation of the same high service levels our citizenry, business owners, and stakeholders expect from our city.

Fiscal Year 2027 Annual Action Plan

The City Council Retreat during January 2026 set forth priorities to guide the construction of the FY 2027 budget including operations and capital investment. These priorities were condensed into an Annual Action Plan and are detailed within the section of this document entitled *2027 Annual Action Plan* with the components set forth below:



- Strategic Growth and Redevelopment of North Point.
- Safe and Welcoming Community.
- The Alpha Loop and Greenway.
- Downtown Alpharetta.
- Communications that Connect.
- Recreation, Parks, and Culture.
- Infrastructure and Facilities Maintenance.
- Transportation and Traffic.
- People Focused Workforce.
- Economic Development.

Budget Process and Overview

The Fiscal Year 2027 Budget process began with an update of the city's financial condition, which was presented to the Mayor and City Council during the January 2026 City Council retreat.

As previously detailed, the City Council Retreat set forth priorities (Annual Action Plan) that guided our departmental decision making and resource allocation during construction of the FY 2027 budget.

The FY 2027 Budget is balanced for all funds and totals $182 million with the breakdown by fund type as follows:

FUNDS BY TYPE	$	
General Fund	$107,166,499	
Special Revenue Funds	17,745,846	(1)
Capital Project Funds	30,175,671	(1)
Debt Service Fund	6,704,256	
Solid Waste Fund	6,284,164	
Internal Service Funds	13,018,500	
Fiduciary Funds	1,122,361	
Total	$182,217,297	

(1) Amounts contained herein represent new appropriations for FY 2027. Unexpended FY 2026 appropriations for City Council approved projects are re-appropriated annually pursuant to city policy.

Several of the major points of the FY 2027 Budget are as follows:

- Management of personnel and compensation program to align with current market environment which includes budgetary adjustments to cover significant inflation in labor costs which are necessary to retain and recruit our highly skilled workforce:
  - Staffing level of 487 full-time equivalents "FTE" (citywide). No change in the overall staffing level is requested for FY 2027.
  - Staff compensation adjustments aimed at maintaining competitiveness in an inflationary labor market include:
    - Proposed compensation adjustments:
      - ✓ July 1, 2026: Continuation of the annual performance-based compensation program (3% on average) in a total estimated cost of $1.8 million coupled with targeted market-based compensation adjustments (2% to 3% on average in an estimated cost of $640,000). These figures are included within departmental operating budgets.

- Recent compensation adjustments:
  - ✓ July 1, 2025: Continuation of the annual performance-based compensation program (3% on average) in a total estimated cost of $1.6 million coupled with targeted market-based compensation adjustments.
  - ✓ July 1, 2024: Continuation of the annual performance-based compensation program (4% on average) in a total estimated cost of $2.2 million.
  - ✓ July 1, 2024 (Operating Initiative): Market-based personnel compensation adjustments scheduled for July 1, 2024, in a total estimated cost of $913,800.
  - ✓ July 1, 2023: Continuation of the annual performance-based compensation program (4% on average) in a total estimated cost of $1.8 million.
  - ✓ July 1, 2023: This initiative represents a continuation of the City's salary adjustment process aimed at maintaining competitiveness within the market and is estimated at $1.73 million.

- Minimal growth (<1% or $100,569) in departmental maintenance and operations budgets (General Fund). However, included in this figure is one-time funding in FY 2026 for election costs ($150,000 for potential runoff election costs, which were not incurred). After adjusting for FY 2026 election funding, the base operational growth totals 1%. Specific cost drivers include:
  - Decrease in professional services of -$130,138 (-3% reduction) due primarily to FY 2026 funding for runoff election costs that are not needed in FY 2027 (as discussed above; FY 2027 is not an election year).
  - Increase in maintenance contract costs of $158,034 (3% growth) due primarily to the following:
    - Public Works: increase in maintenance contract costs of $103,692 (7% growth) due primarily to anticipated landscape (ROW) maintenance cost growth (current contract expires in January 2027, new projects such as Webb Bridge Road streetscape come online in sections, etc.), growth in funding for the North Fulton Regional Radio System Authority, etc.
    - Recreation, Parks & Cultural Services: Increase in maintenance contract cost growth of $59,793 (3%) due primarily to additional funding for shavings/manure removal (Equestrian Center), parks landscape maintenance, janitorial services, etc.

- Decrease in IT professional services costs of -$265,537 due primarily to the following:
  - Partial reduction in estimated software maintenance fees for Hexagon (the FY 2026 Budget included year-2 software maintenance fees; however, with the revised go-live estimate for Fall 2026, year-2 software maintenance fees will not be needed until FY 2028). This action results in a funding reduction of -$372,940 in FY 2027 (includes removal of $136,569 in Milton pass-through funding and $232,940 in Alpharetta hexagon software funding). This maintenance funding will be reprogrammed into the FY 2028 Budget.
  - Offsetting the reduction noted above is general growth in citywide technology infrastructure costs including Microsoft Enterprise licensing cost growth of $89,090 (this includes Copilot AI costs of $40,500) as well as specific department enterprise financial management software costs including Tyler Munis ($15,330 growth) and revenue management software (occupational business licenses, hotel taxes, etc.) for Finance, CityWorks for Public Works, Community Development, and Recreation, Parks, and Cultural Services ($21,423 growth).
- Increase in utility expenses of $219,800 (6% growth) for electricity, natural gas, water/sewer, and miscellaneous utilities (e.g., cable and garbage). The main driver is electric utility cost growth and is based on usage trends. GA Power base rates are frozen through 2028, but rate payers are still subject to adjustments in fuel costs, storm recovery costs, etc. Streetlight additions through City projects (e.g. Webb Bridge Road streetscape, etc.) will also drive cost growth. Lastly, FY 2027 includes the addition of $60,000 in electric utility expenses associated with the Tesla Superchargers. Conservatively, we are estimating service fee revenue in an amount totaling $100,000. FY 2027 will be our 1st full year of operations, and the FY 2028 budget will reflect a more accurate operational picture of the Supercharger financial impact as we will have actual usage trends to guide our budgeting forecasts.
- Increase in travel/training of $38,725 due to a citywide professional development focus aimed at equipping staff with the skills, knowledge, and adaptability needed to deliver efficient, compliant, and high-quality services to the community.
- Increase in insurance premium funding of $146,000 (14% growth) to the Risk Management Fund to cover the increasing costs of liability insurance premiums.

  - All other departmental maintenance and operations accounts declined -$66,315, or -1%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

- Other Uses include Contingency (1% of Operational Expenditure Appropriations), Debt Service on the Gwinnett Technical College Campus contribution, and the initial year funding impact associated with Senate Bill 285 passed during the 2026 legislative session that requires local governments to remit 1.5% of Insurance Premium Tax collections to the POAB (Peace Officers' Annuity & Benefit Fund of Georgia).
- Funding from the General Fund, which is available for immediate capital investment in 2027, includes the following:

▪ $ 5,661,572	Fund Balance for one-time capital.
▪ 475,000	Capital Contribution from the General Fund.
$ 6,136,572	

Please refer to the Fund and Departmental Summary sections of this document for (1) multi-year revenue/expense statements on both a citywide and individual fund basis (e.g., Special Revenue Funds, Enterprise Fund, etc.) as well as (2) a personnel listing by department.



Budget and Millage Rate Hearings

As set forth under Georgia law and the City of Alpharetta Code, citizen input is solicited during the process of adopting the budget through publicly advertised meetings as follows.

DATE	ACTION
May 4, 2026	Release Fiscal Year 2027 Budget (pdf, transparency site, etc.)
May 4, 2026	City Council Budget Workshop
	Base Budget, Operating and Capital Initiatives
May 18, 2026	City Council Budget Workshop
	Base Budget, Operating and Capital Initiatives
June 1, 2026	1st Public Hearing and Council Meeting (Budget/Millage)
	1st reading of Budget Ordinance
	1st reading of Millage Rate Ordinance
June 15, 2026	2nd Public Hearing (Budget/Millage; 11:30am)
June 15, 2026	3rd Public Hearing and Council Meeting (Budget/Millage)
	2nd reading of Budget Ordinance
	2nd reading of Millage Rate Ordinance

Budget Issues and Priorities

The FY 2027 Budget formalizes numerous key financial factors which have been themes for several years within the government.

- ✓ Taxpayer savings.
- ✓ Cost of government.
- ✓ Bond ratings.
- ✓ Debt service payments.
- ✓ Expansion of departmental service levels.
- ✓ Proper use of fund balance.
- ✓ Funding capital initiatives from operating budget.
- ✓ Maintaining an effective capital improvement program.

Taxpayer Savings – City (annual)

The FY 2027 millage rate, coupled with the city's substantial Homestead Exemptions, goes great lengths in keeping Alpharetta an affordable place to live and strategically position us relative to neighboring areas. The city's multiple homestead exemptions are estimated to save our homeowners over $11 million annually and include:

- Floating Homestead exemption that caps the taxable value growth of homesteaded properties to the lesser of 3% or CPI.
- Basic Homestead exemption of $45,000 off the assessed value of homesteaded properties which is among the highest in the State.
- Senior Basic Homestead exemption of $25,000 off the assessed value of homesteaded properties for residents aged 65 and older.
- Senior full-value exemption available to residents aged 70 and older who meet certain income requirements.

The City's homestead exemptions, coupled with the one-time HTRG credit (see below) will **save our homeowners over $12.3 million** in FY 2027.

Taxpayer Savings – State HTRG Program (one-time)

On March 3, 2026, House Bill 973 was signed into law and is reflected in the State of Georgia's Amended Fiscal Year 2026 budget. One component of this bill includes an initiative by Governor Brian Kemp to refund $850 million in property taxes back to homesteaded property owners in 2026. Specifically, HB 973 authorizes the HTRG Program (Homeowner Tax Relief Grant) which provides onetime tax relief to homesteaded property owners by reducing the assessed value of their property by up to $18,000.

The City will add the HTRG exemption to its current homestead exemption offerings, which are among the highest in the State, resulting in additional savings estimated at $1.3 million for our homeowners. The City will work with the GA Department of Revenue and claim reimbursement for the value of HTRG Program. The City's property tax revenue will not be affected under this program.

Cost of Government

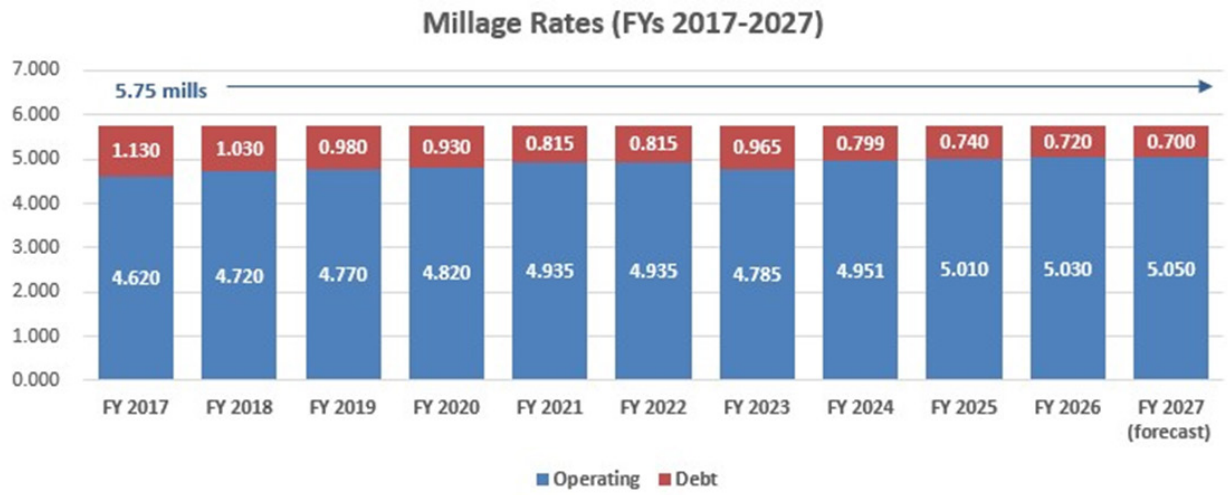
The city has historically acknowledged the need to provide a taxation rate commensurate with the government's level of service.

The FY 2027 Budget is based on **maintenance of the city's millage rate at 5.750 mills**.

- The portion of the millage rate funding debt service (Debt Service Fund) is estimated to decrease 0.020mills compared to FY 2026 to a total of 0.700 mills. As our annual debt service obligations are relatively flat, growth in the tax digest allows for a reduction in the debt service millage rate. The decrease in tax revenue associated with the debt service millage shift is estimated at -$180,000.

- The portion of the millage rate funding operations and capital investment (General Fund) is estimated to increase 0.020 mills compared to FY 2026 to a total of 5.050 mills. The increase in tax revenue associated with the operations millage shift is estimated at +$145,000 and has been allocated towards operating initiatives and capital funding. The shift from debt service millage to operations millage results in additional tax savings for our homeowners as the operations millage rate is subject to homestead exemptions.

The chart below illustrates the annual millage rates levied by the city for the last 10 years including the request for FY 2027.



Bond Ratings

The city's AAA bond rating was reaffirmed by Moody's and Standard & Poor's ("S&P") during January 2022 in conjunction with the sale of $27 million (par) of Series 2022 General Obligation Bonds to fund a variety of park enhancements and projects.

The AAA rating represents the highest rating available to municipalities and translates to significant savings to our citizens and stakeholders through reduced borrowing costs. This rating demonstrates the strongest creditworthiness relative to other US municipal or tax-exempt issuers and reflects the city's current sound financial position as well as strong financial management practices guiding our ongoing decision making. These practices are supported by formal policies to guide budget and procurement practices, capital investment, and debt management. Other positive factors include a relatively strong economic base and manageable debt/pension burdens. The FY 2027 Budget is mindful of these factors and the importance of maintaining the highest rating, not only for our citizens but also our bondholders.

Debt Service Payments

The city's primary method of funding large-scale capital projects is through the issuance of bonds (e.g., general obligation bonds, Development Authority bonds, etc.). General obligation bonds have been issued to fund numerous large-scale projects including public safety facilities, parks and recreation facilities, and transportation improvements that continue to define Alpharetta as a desirable community to work and live in. General obligation bonds are funded through a separate millage levy. The Alpharetta Development Authority, a component unit of the city that is focused on economic development within our borders, issued bonds in 2016 to fund construction of our state-of-the-art Conference Center. These bonds are funded by a portion of the Hotel/Motel Tax.

Principal and interest payments for fiscal year 2027 are budgeted at $8.5 million with the following forecast: 2028 - 2041[1]: $8.8 million (annual average); 2042-2046[2] totaling $1.6 million (annual average). These figures include City and Development Authority obligations and span multiple Funds.

Expansion of Departmental Service Levels (Operating Initiatives)

The FY 2027 budget includes expanded service levels totaling $27,500 within multiple departments and increases in capital investment and is described in detail under the *Operating Initiative Requests* section of this document.

Proper Use of Fund Balance

General Fund: Based on audited financial statements for the year ending June 30, 2025, the city's fund balance totaled $35.7 million. Of this amount, approximately $5 million was appropriated in the FY 2026 Budget for capital/one-time initiatives/ reserve, $800,000 for legal contingency reserves, and $24.2 million has been designated as an emergency account based on a conservative policy of 25% of total appropriations (i.e., roughly 3 months of operating expenditure). It has been the city's policy to utilize the remaining fund balance above the emergency requirement for one-time expenditures (generally capital investment). Available capital/one-time initiative funding for FY 2027 totals $5.7 million.

Funding Capital Initiatives from Operating Budget

The FY 2027 budget includes funding totaling $475,000 from General Fund operations for capital investment (e.g., replacement of our infrastructure and equipment, etc.). The annual capital funding goal from General Fund operations is $7.5 million and is a budgetary planning priority for future budgets. By programming an annual capital contribution into the operating budget, the city is announcing to its citizens and stakeholders that capital investment in our roads and infrastructure is a priority that should be funded with certainty

[1] Represents the final maturity of the Series 2016 Alpharetta Parks and Transportation Bonds and the Series 2016 Development Authority Revenue Bonds.

[2] Represents the final maturity of the Series 2022 General Obligation Bonds.

as opposed to relying on fund balance which may or may not be accumulated. Funding from the General Fund, which is available for immediate capital investment in 2027, includes the following:

- $ 5,661,572 Fund Balance for one-time capital.
- 475,000 Capital Contribution from the General Fund.

$ 6,136,572

Maintaining an Effective Capital Improvement Program (Capital Initiatives)

The FY 2027 Capital Plan includes funding of $36.5 million for capital initiatives (including potential grant funding). Base capital funding totals $32.7 million and has been appropriated to the identified projects and non-allocated. Other Sources totaling $3.8 million and consisting of anticipated LMIG (Local Maintenance & Improvement Grant) and LRA (Local Roads Assistance Grant) grant funding and Capital Lease funding will be appropriated once received (and/or appropriate agreements executed).

FY 2027 Capital Source & Use Summary	Capital Project Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund	TSPLOST 2 Capital Fund	Impact Fee Fund (Parks)	Subtotal	Other Sources (grants, etc.)	Total
Sources									
Available Fund Balance	$ 3,500,000	$ -	$ 450,000	$ 1,939,099	$ 7,600,000	$ 2,500,000	$ 15,989,099	$ -	$ 15,989,099
General Fund									
Annual Capital Appropriation	475,000	-	-	-	-	-	475,000	-	475,000
Available Fund Balance	4,261,572	1,400,000	-	-	-	-	5,661,572	-	5,661,572
TSPLOST Collections	-	-	-	-	9,000,000	-	9,000,000	-	9,000,000
Investment Earnings	400,000	100,000	-	300,000	750,000	-	1,550,000	-	1,550,000
Other									
Local Maintenance Improvement Grant (LMIG); Milling and Resurfacing	-	-	-	-	-	-	-	731,300	731,300
Local Roads Assistance Grant (LRA); Milling and Resurfacing	-	-	-	-	-	-	-	838,403	838,403
Capital Leases	-	-	-	-	-	-	-	2,275,000	2,275,000
Total Sources	**$ 8,636,572**	**$ 1,500,000**	**$ 450,000**	**$ 2,239,099**	**$ 17,350,000**	**$ 2,500,000**	**$ 32,675,671**	**$ 3,844,703**	**$ 36,520,374**
Uses									
Capital/One-Time Initiatives									
Economic Development	$ 100,000	$ -	$ -	$ -	$ -	$ -	$ 100,000	$ -	$ 100,000
Information Technology	567,800	-	-	-	-	-	567,800	-	567,800
Police	1,556,249	-	-	-	-	-	1,556,249	-	1,556,249
Public Works	2,750,000	1,500,000	-	-	5,131,597	-	9,381,597	3,844,703	13,226,300
Recreation, Parks & Cultural Servi	1,243,500	-	450,000	-	-	1,169,000	2,862,500	-	2,862,500
Community Development	-	-	-	-	-	-	-	-	-
Total Uses	**$ 6,217,549**	**$ 1,500,000**	**$ 450,000**	**$ -**	**$ 5,131,597**	**$ 1,169,000**	**$ 14,468,146**	**$ 3,844,703**	**$ 18,312,849**
Non-Allocated (Future Capital/One-Time Initiatives)	**$ 2,419,023**	**$ -**	**$ -**	**$ 2,239,099**	**$ 12,218,403**	**$ 1,331,000**	**$ 18,207,525**		

Recommended capital investment totals $18.3 million and is focused on maintaining and improving city infrastructure and assets, including:

- Acting on the findings of the Facility Condition Assessment completed during FY 2025 (City Facility Preventative Maintenance Assessment and Implementation, HVAC Replacements, generator replacements, Public Safety Headquarters maintenance, Fire Station maintenance, City Hall maintenance, etc.).
- Continuing focus on the responsible maintenance and preservation of our municipal infrastructure to serve the needs of the entire community now and into the future (milling/resurfacing, stormwater, fleet, equipment, parks amenities, etc.).
- Incorporating the Fleet Maintenance and Replacement Policy (adopted in FY 2026) process into the annual budget and CIP which establishes a uniform framework for fleet maintenance, acquisition, utilization, and replacement planning across all City departments.
- Delivering on prior-year design projects (Marietta-Roswell St. Corner Park).
- Leveraging restricted revenue sources (parks impact fees) to deliver service improvements to our citizens and stakeholders (Greenway restrooms at Haynes Bridge Road Park and Marconi Drive Park as well as buildout of the Marietta-Roswell St. Corner Park).

An additional $18.2 million is being reserved to provide flexibility for future prioritized capital investment.

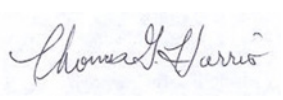
Please refer to the *Capital Project Fund Summaries* and *Appendix A (Detailed 5-Year Capital Improvement Plan)* sections of this document for details of the requests.

In closing, while this budget is conveyed on behalf of the City Administrator, this document is due in large part to the diligent work of staff, as well as the constructive management provided by the City Council and the feedback provided by our citizenry. We would like to thank our elected officials for their effective leadership and commitment to continuing our Signature City status in the region, despite the many demands on their time and interests.

Respectfully Submitted,



Chris Lagerbloom
City Administrator



Thomas G. Harris
Finance Director

Fiscal Year 2027 Annual Action Plan

The City Council Retreat during January 2026 set forth priorities to guide the construction of the FY 2027 budget including operations and capital investment. These priorities were condensed into an Annual Action Plan with the following components:

- Strategic Growth and Redevelopment of North Point.
- Safe and Welcoming Community.
- Communications that Connect.
- Downtown Alpharetta.
- The Alpha Loop and Greenway.
- Recreation, Parks, and Culture.
- Infrastructure and Facilities Maintenance.
- Economic Development.
- People Focused Workforce.
- Transportation and Traffic.



FISCAL YEAR 2027 ANNUAL ACTION PLAN

The 2027 Annual Action Plan builds upon the city's Community Vision and guides construction of the FY 2027 budget including operations and capital investment. Linkages, where applicable, have been provided within the *Operating Initiative Requests* and *Capital Project Fund Summaries* sections of this document.

Strategic Growth and Redevelopment of North Point

- North Point holds tremendous potential as one of the city's main redevelopment areas. To ensure that we make the most of this opportunity, we will dedicate the necessary time and attention to get it right.
- As new projects and opportunities emerge in our city, we remain committed to supporting strategic growth. We believe that our city is unique and deserves development patterns that reinforce that fact.
- To support North Point redevelopment, we re-created the tax allocation district and will evaluate new tax opportunities.
- We will explore options to improve transportation in the area, including the alignment of the Alpha Link to connect to Encore Parkway Gateway Park.

Safe and Welcoming Community

- We enjoy the benefits of a safe community, and we are driven to protect everything within our borders.
- We value and support our Police and Fire Departments and recognize their essential role in keeping our city safe. We are committed to providing them with the necessary resources to fulfill their duties effectively.
- Our 911 dispatchers are lifelines to our community. We will actively remember their value.
- We will examine all emerging technologies and how they can enhance the way we keep our community safe, such as enhanced cameras and unmanned aerial flights.
- We will evaluate our community paramedic program and quantify results, make changes, and look for ways to provide new services.

Communications that Connect

- Through talented communicators, we will improve communication across all areas of our organization, including internal communications, and implement an effective crisis communications plan.
- To improve community engagement, we will develop a new website featuring advanced capabilities that will enable us to communicate in real-time, providing timely and relevant information.
- Through the launch of the new city website, we will enhance our usability by exploring AI options and further refine the Alpha Bot chat feature.
- We will focus our communication strategy on crafting compelling content and strategic messaging and will seek new and evolving ways to connect with the public.

Downtown Alpharetta

- Safety is fundamental to a vibrant downtown. We understand the importance of our image and remain driven to provide a safe environment.
- Effective parking management is key to ensuring that everyone can enjoy downtown. We will continue to explore and implement strategies that maximize our current parking resources.
- We are dedicated to supporting our local businesses and will collaborate with the Downtown District to identify and pursue mid-term and long-term options that maintain the character, cleanliness, and desirability of downtown.
- We will create a balance by designating specific areas for activity while preserving green space for leisure.

The Alpha Loop and Greenway

- Our city is mobile. Extending the Alpha Loop and Alpha Link remain an important focus of our transportation network.
- User experience matters, and we will pursue public art and other gateway features on our transportation network.
- We will review the Alpha Loop project plan to identify and address any gaps. Project phasing will be considered if necessary.
- To ensure that we have the necessary resources to complete the Alpha Loop, we will identify additional funding sources and seek out interested private investors.

Recreation, Parks, and Culture

- Parks are valued assets in our city, and we will continue to deliver on park bond projects to ensure that our parks are well-maintained and equipped with the necessary amenities to serve our residents.
- We will renovate, reimagine, and construct improvements to all parts of Wills Park.
- We will partner with the Equestrian Foundation to complete arena projects and other important updates at the equestrian center.
- Culture is an important part of our community, and we are committed to implementing efforts that celebrate it. We will continue to promote public art and the filming of oral history to showcase our shared history and traditions.
- We will promote fun.

Infrastructure and Facilities Maintenance

- To maintain the safety and long-term functionality of our facilities, we will conduct assessments, formulate recommendations, and develop renovation plans.
- Managing stormwater is important in our city, and we will continue investing in projects with high impact areas.
- Focus on transportation enhancements to our transportation network, the completion of the Highway 9 project, the Webb Bridge Road project, and the beginning of the Old Milton project are important.
- New street and directional signage will be designed and installed to improve wayfinding and enhance public spaces, making it easier for residents and visitors to navigate the city.

Economic Development

- To attract new businesses and industries to our city, we will explore innovative solutions by repurposing underutilized areas that can be transformed into thriving working models creating a vibrant and diverse economy that benefits both our residents and businesses.
- Maintaining a presence in Atlanta and Washington DC is crucial for our city, and we will utilize lobbying services to help us achieve our goals in both locations.
- We will continue to pursue grants to fund projects and initiatives that benefit our city, creating opportunities for growth and development.
- We will market Alpharetta more comprehensively. As our focus on Economic Development grows, we will reach broader audiences and diversify the way we market ourselves as a desirable city to do business in.

People Focused Workforce

- Our highly talented staff works tirelessly to serve our community. We're committed to recruiting, retaining, and rewarding our public servants to ensure we continue to attract and retain top talent. By investing in our staff, we can build a stronger, more effective team that provides top-quality services for our community.
- We strive to be an employer of choice that attracts and retains the best talent. Our employees are our greatest asset, and we are devoted to providing them with a rewarding work environment. We will continue to implement a competitive market compensation system that ensures employees are well-compensated and supported.

Transportation and Traffic

- Our city is on the move, and we recognize the importance of managing traffic and promoting ease of mobility in our city as it continues to grow and evolve.
- We support multi-modal transportation options and will explore both traditional and non-traditional solutions for surface, underground, and aerial transportation to meet the diverse needs of our community.
- Public transit is a crucial component of a well-connected community, and we will continue to support bus rapid transit in the Georgia 400 Corridor.

About Alpharetta

History[3]

From the North Georgia Mountains to the Chattahoochee River along a Cherokee Indian trail, a tiny village named *New Prospect Campground* was formed. This village made up of tents, a log school, and an arbor became a trading post where Indians and settlers exchanged their goods. The surrounding countryside provided excellent farmland, especially for cotton. On December 11, 1858, the town was chartered and became the county seat of Milton County. The town was renamed Alpharetta from the Greek words “alpha” meaning first and “retta” meaning town.

Alpharetta and Milton County can trace their history to the time of the Cherokee Indian Nation resettlement in the 1830’s. First, drawn by the promise of free Indian lands, a few somewhat itinerant settlers moved into the area. These first pioneers were soon followed by permanent farmers and merchants who were the fortunate winners of the land lotteries of the early 1830’s.

The first permanent landmark in the area was the New Prospect Campground, often referred to as the "Methodist Campground". This campground was located next to a natural spring just north of the present "downtown" section of Alpharetta. A "Camp Meeting" in that era was the social and cultural highlight of the year for the families living on isolated farms with few travel options.



On December 11, 1858, Alpharetta was legally chartered. Prior to July of that year, the town was known as the "Town of Milton". The original town charter provided that the city could pass a tax on every grocery store, retailing liquor store, hallway and billiard table of not more than $25 per year. Another provision of that charter was the right to levy a tax of $25 on

[3] The information contained within this section is based upon original research by Anne Rogers Ferguson and accessed via the City of Alpharetta website.

every show that may be exhibited within the city. The first report of the city Trustees showed a balance of $1,302 for fiscal year 1859.

A courthouse and jail were soon constructed, and with building costs being what they were, the final bill for the completed facility was $2,400. This building served as a landmark for the city limits because, according to the charter, the limits were to extend in a one-half mile radius from the Courthouse.

By the time of the Civil War, Alpharetta had grown to a fair-sized town with three hotels, several mercantile shops, numerous churches and a school. The farms around the area were for the most part small family farms and most of the farmers were not slave owners.

In 1863, an epidemic of smallpox spread through town. In one instance, 16 cases of the disease were recorded in two families alone. Guards were hired to keep people from leaving their quarantine and thereby spreading the sickness further.

Many of these early records are incomplete because as the left flank of the Union Army passed through Milton County, the original Courthouse was burned. In fairness, it was never established whether it was burned by the Union Troops or by retreating Confederate soldiers. In any case, one enterprising citizen, a Dr. O.P. Skeleton salvaged many of the court documents and carried them to a hiding place in Jackson County and promptly billed the city $30.00 for "services rendered". Later, the city paid O.P.'s friend, John Webb, $60.00 to bring them back.

As the Civil War ended, Alpharetta, along with the rest of the South, suffered a period of economic hardship. These "hard times" tended to draw folks together and a sense of community identity began to grow. As hard as these times were, Milton County fared better than many areas. Since the area was populated primarily by small farms and merchants, the collapse of the "Plantation" economy had nowhere near the impact as in other communities.

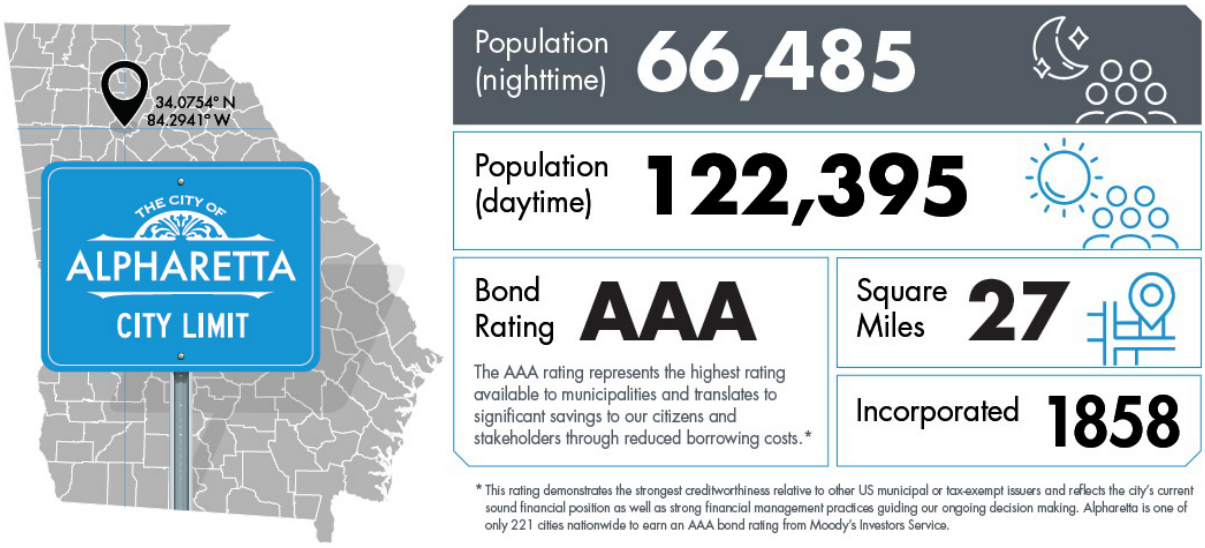
In the next decades, growth in Milton County was steady, but never spectacular. The area was hampered by the lack of a railroad, around which most growth in those times was centered. The nearest railroad dead-ended at the river in Roswell. It is ironic that in those times a railroad was so important, but today the absence of a noisy and dangerous railroad track is considered desirable for community development.

When the depression of the early 1930's devastated the nation's economy, Milton County found itself near bankruptcy. In order to save the area from disaster, it was decided that a merger of Milton County with Fulton County would be to everyone's advantage. It was because of this merger that the first roads began to be paved. Until that time, the only paved roads in the area were State Highway 19 (now Highway 9) and 120 (now Old Milton Parkway).

Today, Alpharetta represents one of fourteen incorporated cities/towns within Fulton County and is one of the fastest growing communities in the South. Its environment is

considered ideal for raising families and living a quality lifestyle free from the problems found in so many similar sized cities.

Located approximately 25 miles north of the City of Atlanta, Alpharetta occupies a land area of approximately 27 square miles and serves an estimated population of 122,395 (daytime) and 66,485 (nighttime). Population growth has been fueled in part by the city's strong economic base as well as the annexation of surrounding communities. With the incorporation of the City of Milton and the City of John's Creek, all unincorporated areas within north Fulton County have been absorbed. As such, future growth is through development and redevelopment as opposed to annexation. Please refer to the *Alpharetta by the Numbers* section of this document for detailed economic and demographic information about our great city.



Government

The City of Alpharetta ("city") operates under a strong mayoral form of government, whereby the mayor possesses all the executive and administrative powers granted to the government under the constitution and laws of the State of Georgia and the city charter. Policy making and legislative authority are vested in the governing council, consisting of the mayor and six (6) council members, all elected on a non-partisan basis. The mayor is chosen by popular vote. City Council members run for a specific post, but they are elected by a citywide vote. The city's elected officials serve four (4) year terms which begin on January 2nd immediately following the date of election into office. Council members elected for three (3) consecutive terms are not eligible for the succeeding term. A mayor elected and qualified for two (2) consecutive terms is not eligible for a succeeding term. Elections are held every two (2) years and are conducted by the Fulton County Board of Elections. The Mayor and City Council appoint a City Administrator to carry out the day-to-day operations of the city.

The city provides a full range of services, including police and fire protection; the construction and maintenance of highways, streets, and other infrastructure; and recreational activities and cultural events. Sanitation services are provided through relationships with private operators. The city relies heavily on its dedicated volunteers that provide their expertise and time through serving on our various board and commissions which include.

Board of Ethics

Meeting Day:	As Needed
Meeting Time:	Case-By-Case Based on Member Availability
Meeting Location:	Alpharetta City Hall – Council Chambers
City Department:	City Clerk

The Board of Ethics is charged with conducting investigations and hearings of complaints of unethical behaviors by City Officials. The City of Alpharetta adopted an Ethics Ordinance to ensure that City Officials will work for the common good of the people of Alpharetta and not for any private or personal interest, they will ensure fair and equal treatment of all persons, claims, and transactions coming before City Council, Boards, and Commissions.

When a complaint is submitted and meets the requirements of the code, the board will have a meeting to conduct an initial review of the ethics complaint to determine whether specific, substantiated evidence from a credible source(s) exists in the ethics complaint to support a reasonable belief that there has been a violation of this article. If the complaint is substantiated by a reasonable belief that there has been an ethics violation, the Board shall set a hearing at least 30 days from the date of notice for the hearing.

Five members have been appointed to serve a term of four years, and there are two alternates for the Board. Three members must be attorneys, while the remaining two must be residents of the city.

Board of Zoning Appeals

Meeting Day:	3rd Thursday of the Month (generally)
Meeting Time:	5:30 PM
Meeting Location:	Alpharetta City Hall – Council Chambers
City Department:	Community Development

The Board of Zoning Appeals hears and decides appeals of determinations made by the Director of Community Development and may authorize a hardship variance or an exception from the City's Unified Development Code. The Board of Zoning Appeals may hear variance or exceptions that fall between a 20% and 50% variance or exception from the City's stipulated code requirement.

Code Enforcement Board

Meeting Day: As Needed
Meeting Time: 3:30 PM
Meeting Location: Alpharetta City Hall – Council Chambers
City Department: Community Development

The Code Enforcement Board was created with the intent to promote, protect, and improve the health, safety, and welfare of the citizens of Alpharetta. The Code Enforcement Board has the authority to impose administrative fines and non-criminal penalties as a method of enforcing City codes and ordinances where a pending or repeated violation continues to exist.

Cultural Arts Commission

Meeting Day: 4th Tuesday of the Month
Meeting Time: 6:00 PM
Meeting Location: Alpharetta City Hall – Council Chambers
City Department: Recreation, Parks, and Cultural Services

The Cultural Arts Commission was created with the intent to promote, protect, and support the growth of cultural arts in the City of Alpharetta. The Commission reviews and recommends the acquisition of all works of art to be purchased by or gifted to the City, encourages cultural enrichment programs, supports existing local arts and culture organizations, and works to expand public understanding, appreciation, and enjoyment of cultural activities and art forms.

Further, the Commission advises the City Council on art acquisition, strategic arts planning, local art groups, sponsoring artistic performances and programs, preservation of city cultural landmarks, and design and location of current or future statutory or artworks owned by the City.

Design Review Board

Meeting Day: 3rd Friday of the Month
Meeting Time: 8:30 AM
Meeting Location: Alpharetta City Hall – Council Chambers
City Department: Community Development

The Design Review Board is charged with conducting a public hearing for all design applications for non-single-family detached buildings, structures, sites, and property areas that are located within the Downtown Overlay, Corridors of Influence, Interchange Districts, and any other applications forwarded to the Board by the Director of

Community Development. Further, the Design Review Board hears and decides appeals of administrative decisions, where the Director of Community Development has denied sign design approval.

The Board reviews design applications for exterior features of new construction or changes to existing structures, exterior modifications, new paint selection, and signage applications for master plans or properties within the Downtown Overlay. The Board grants or denies applications based upon a review of the application's compliance with the City's design standards and preservation of the historical, cultural, and aesthetic heritage of the City.

Development Authority

Meeting Day:	2nd Thursday of the Month
Meeting Time:	6:00 PM
Meeting Location:	Alpharetta City Hall – Council Chambers
City Department:	Economic Development

The Alpharetta Development Authority is a seven-member board appointed by the Alpharetta City Council with the goal of fostering commerce and growth within the City of Alpharetta.

Statement of Purpose: The Development Authority of Alpharetta is granted powers and jurisdiction through the Georgia General Assembly and a resolution adopted by the Alpharetta City Council on September 3, 1996, and is regulated under O.C.G.A. Sec. 36-62-1. The function of this Authority is to promote the public good and general welfare, trade, commerce, industry, general tax base, and the employment opportunities available in the City of Alpharetta. To accomplish these goals, the Authority may acquire, own, and/or lease real property; issue revenue bonds or other obligations to finance projects and may arrange or provide for property tax abatements or other means of incentivizing projects. The Authority may also engage in a variety of initiatives and programs to promote and market the community and/or strengthen the city's position as a location for business investment.

The Development Authority consists of seven members who are appointed by vote of the City Council, with each member serving a term of four years. In accordance with Georgia Law, the members of the Authority do not receive compensation for their service but may be reimbursed for out-of-pocket expenses incurred in performing the duties of their appointment.

Historic Preservation Commission

Meeting Day: 2nd Thursday of the Month

Meeting Time: 3:00 PM

Meeting Location: Alpharetta City Hall – Council Chambers

City Department: Community Development

The Historic Preservation Commission updates and maintains an inventory of all properties and buildings within the City that have the potential for designation as a historic property. The Historic Preservation Commission is charged with the responsibility of conducting a public hearing for applications seeking historic property designation. Also, the Commission reviews historic preservation plans and may make recommendations, and further, approve or deny said preservation plans. The Commission makes recommendations to City Council when a historic structure should be listed in or removed from the City's Historic Resources Inventory – Contributing Historic Buildings and may also recommend other historic preservation incentive programs for City Council to review.

Additionally, the Commission promotes programs related to historic properties, may undertake the restoration or preservation of a historic property owned by the City (based on funding and City Council approval), conduct education programs on historic properties, and may retain persons with professional expertise to carry out tasks related to historic preservation.

Natural Resources Commission

Meeting Day: 3rd Tuesday of the Month

Meeting Time: 6:30 p.m.

Meeting Location: Alpharetta City Hall – Executive Conference Room (1st Floor)

City Department: Public Works / Community Development

The Natural Resources Commission advises City Council, provides leadership in the development and understanding of the tree program, and assists the Director of Community Development and Director of Public Works in the development and maintenance of technical specifications. Further, the Commission maintains a list of proposed changes to the kinds and species of trees described in the City's Tree Planting List. Any changes are presented before City Council by way of resolution.

Planning Commission

Meeting Day:	1st Thursday of the Month
Meeting Time:	6:30 PM
Meeting Location:	Alpharetta City Hall – Council Chambers
City Department:	Community Development

The Planning Commission is charged with the responsibility of conducting a public hearing for all applications for zoning changes, Comprehensive Land Use Plan amendments, and amendments to the City's Unified Development Code. During the public hearing, the Commission reviews applications and makes an appropriate recommendation (based on the City's Unified Development Code) to City Council.

Further, the Commission may also initiate proposed changes to the Comprehensive Land Use Plan and the City's Unified Development Code when said changes are necessary or desirable.

Recreation Commission

Business Meeting Day:	2nd Tuesday of the Month
Business Meeting Time:	5:30 PM
Business Meeting Location:	Alpharetta City Hall – Council Chambers
Workshop Meeting Day:	3rd Wednesday following the Regularly Scheduled Recreation Commission Business Meeting
Workshop Meeting Time:	5:30 p.m.
Workshop Meeting Location:	Alpharetta City Hall–Community Room
City Department:	Recreation, Parks, and Cultural Services

The Recreation Board was created in an advisory capacity to the Alpharetta City Council in matters of policy and administration of city-owned parks, recreation programs, special events, and other activities as managed by the city's Recreation, Parks, and Cultural Services Department. The recreation board is authorized to receive public input for changes or improvements to current parks, recreation, or cultural activities within the City of Alpharetta.

All meetings and hearings are held at Alpharetta City Hall (2 Park Plaza, Alpharetta, GA 30009) and are open to the public. City residents and stakeholders are encouraged to attend.

All meetings are subject to change. Please confirm the dates/times on the city's website: https://alpharettaga.portal.civicclerk.com/.

Alpharetta by the Numbers

OUR COMMUNITY





Population (nighttime) **66,485**

Population (daytime) **122,395**

Bond Rating **AAA**

The AAA rating represents the highest rating available to municipalities and translates to significant savings to our citizens and stakeholders through reduced borrowing costs.*

Square Miles **27**

Incorporated **1858**

*This rating demonstrates the strongest creditworthiness relative to other US municipal or tax-exempt issuers and reflects the city's current sound financial position as well as strong financial management practices guiding our ongoing decision making. Alpharetta is one of only 221 cities nationwide to earn an AAA bond rating from Moody's Investors Service.

about us

Alpharetta's remarkable growth is no coincidence. Guided by community-driven planning and visionary leadership, the city has blossomed into a vibrant hub where businesses flourish, families thrive, and neighborhoods feel genuinely connected. Local leaders have shaped Alpharetta into a place where everyday life feels anything but ordinary.

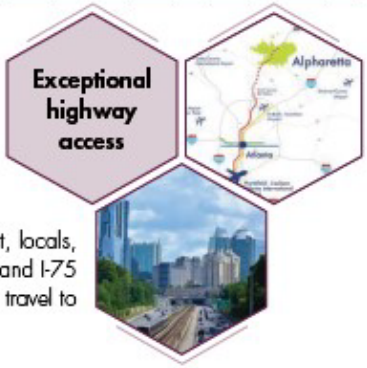
strategic location *seamless access*

Strategically embedded in one of America's most competitive economies, Alpharetta sits at the heart of the prestigious North Fulton suburbs. The region also features the communities of Johns Creek, Milton, Roswell, and Sandy Springs. North Fulton is home to approximately one third of Fulton County's total 1.09M population. The area provides easy access to many successful businesses and the clear benefits of a strong knowledge worker economy. Just 25 miles from downtown Atlanta, the city is part of the highly-desirable Metro Atlanta region and directly benefits from Georgia's top-ranked business climate.



TRANSPORTATION

connected regionally and globally



Alpharetta offers a well-integrated transportation network with a combination of regional highway access points, MARTA transit connections, abundant nearby international air service, regional rail service, and trail-based local mobility options.

With direct access to Georgia 400 through five interchanges, it's easy for workforce talent, locals, and visitors to all move around the region and far beyond. Easy proximity to I-285, I-85, and I-75 provides convenient highway reach across Atlanta metro, enabling same-day regional car travel to Charlotte, Nashville, Birmingham, and more.

public transportation bus routes to North Springs



Alpharetta is served by five MARTA bus routes, including intra-city connections with direct service to the North Springs MARTA Station, the northernmost rail terminal in the region. From there, commuters and visitors can ride the train directly to:

- Buckhead (10 mins)
- Midtown (20 mins)
- Downtown Atlanta (25 mins)
- Hartsfield-Jackson International Airport (45 mins)

global access through the world's busiest airport



Just 34 miles south of Alpharetta, Hartsfield-Jackson Atlanta International Airport (ATL) provides unparalleled global reach. The airport enables travelers to take advantage of:

- Nonstop flights to 150+ U.S. cities
- Service to 70+ international destinations across 43 countries
- 286,000 average daily passengers
- 80% of the U.S. population living within a 2-hour flight of Atlanta

rail freight transport prividing inland port access



Rail freight lines intersect the region, delivering strategic options to support advanced logistics needs. The Blue Ridge Connector will soon offer a direct rail link between Northeast Georgia and the Port of Savannah via the nearby inland port of Gainesville. This new route will reduce highway congestion, streamlining costs for local businesses by eliminating the 600-mile round trip truck route to move goods for import/export.

BUSINESS ADVANTAGES

the best companies choose Alpharetta

Alpharetta stands at the intersection of innovation, connectivity, and community, offering a dynamic environment where businesses don't just operate – they thrive. Strategically positioned with convenient access to Metro Atlanta and global markets, Alpharetta empowers companies to launch, scale, and succeed in a city built for growth.

More than 5,000 businesses – including approximately 900 technology firms and nine Fortune 500 companies – have chosen Alpharetta as their home. The city boasts over 20 million square feet of premier office space, a pro-business climate with access to valuable state and regional incentives, a highly educated workforce, and a culture of innovation that fuels entrepreneurship and attracts globally recognized brands.

Alpharetta's economic landscape is anchored by key industries that continue to drive growth and attract investment: Technology, Life Sciences & Biological Research, Healthcare, and Research, Development & Precision Production. These sectors benefit from one of the Southeast's most advanced and redundant fiber-optic networks, pro-business policies, premier commercial real estate, and a responsive local government.

5,096 businesses in Alpharetta

~900 technology companies

20 million square feet of office space

1.9 million workers within a 40 minute commute

top 10 employers

Providing a strong economic foundation for our community, the City of Alpharetta is pleased to recognize the top 10 employers based on the number of employees.

Employer	*No. of Employees*
ADP	4,000
Morgan Stanley	2,500
Equifax	2,100
Jackson Healthcare	2,000
Fiserv	1,907
UPS Supply Chain Solutions	1,200
Verizon	1,200
LexisNexis Risk Solutions	1,200
Change Healthcare	1,000
Delta Dental	1,000

Source: City of Alpharetta Economic Development Department



WORKFORCE

robust infrastructure support

As today's workforce becomes increasingly educated, mobile, and selective, quality of life and work flexibility are more important than ever. That's why Alpharetta has invested in the framework, connectivity, and amenities needed to meet the expectations of modern professionals and the businesses that employ them.

85,000+ professionals commute daily to Alpharetta





Whether on-site or remote, companies in Alpharetta benefit from a highly skilled talent pool, an innovative technology community, and dependable infrastructure. Our city offers the best of both worlds: reliable work-from-home access and premier Class A office space within a vibrant community with short commutes, walkable districts, and easy access to dining, entertainment, and green spaces.



GA 400 in Alpharetta is known as The Technology Corridor



regional access to top talent

As one of Metro Atlanta's premier employment hubs, North Fulton, anchored by Alpharetta, offers unmatched access to a highly skilled and mobile workforce. Alpharetta's daytime population nearly doubles to over 122,395, as employees commute from across the region to work in the city's thriving tech sector and growing number of corporate headquarters.

With five direct GA 400 highway interchanges and convenient connectivity to I-285, I-85, I-75, and MARTA transit, Alpharetta is easily accessible for both local and regional commuters, helping provide businesses with a deep and diverse talent pool to draw from.

educated talent pool drawn from highly-regarded colleges

40.2% bachelor's degree

5.1% associate's degree

31.5% graduate or professional degree

Alpharetta's workforce stands out for its exceptional educational attainment, making it a competitive labor market. No matter your industry or growth goals, you'll find employees here with the knowledge and credentials to help your business thrive.

Alpharetta's talent pool draws from top-performing public and private schools, renowned technical colleges, and some of the most respected universities in the nation. Institutions like Gwinnett Technical College—located right here in Alpharetta—offer career-focused programs that keep our workforce agile and prepared for the jobs of tomorrow.

The city is also home to a campus of Georgia State University, while top institutions such as Georgia Tech, Emory University, and Kennesaw State University are within an hour drive.

With a strong educational foundation and access to continued training and development, Alpharetta is perfectly positioned to supply the high-quality, highly skilled workforce your business needs.

GWINNETT TECHNICAL COLLEGE | Georgia State University | Georgia Tech | EMORY UNIVERSITY | KENNESAW STATE UNIVERSITY

CONNECTED ALPHARETTA

trails and parks

room to breathe and space to play

More than 30 parks citywide



With our vision for 77% of residents to live within a 10-minute walk of a park by 2029, Alpharetta is prioritizing outdoor accessibility and environmental stewardship. Over half of the city's total acreage is shaded by a thriving tree canopy.

Our extensive trail system features the Alpha Loop and the Big Creek Greenway. The Alpha Loop links different areas of the city, offering pathways to workplaces, shops, restaurants, and green spaces. The Big Creek Greenway is a scenic trail spanning multiple jurisdictions, including 12 miles within Alpharetta where residents and visitors can walk, run, cycle, or simply enjoy the serenity of nature.



30 sculptures are installed across the city

arts and culture

discover something beautiful

Alpharetta Arts StreetFest

Alpharetta nurtures a dynamic cultural landscape that honors its history while embracing innovation, offering residents and visitors alike a rich tapestry of experiences. At the heart of it all is our Arts and Culture scene, where imagination flourishes and community comes alive.

Whether you're walking on a public arts tour, taking a class at the Alpharetta Arts Center, exploring galleries and artisan shops, or attending an Alpharetta Symphony concert, you'll find inspiration at every turn. Alpharetta's commitment to accessible art, curated performances, and creative placemaking makes it a haven for artists and art lovers of all kinds.

community events

opportunities to belong

Over 200 community events each year



The Alpharetta Farmers Market takes place on Saturday mornings April–November.

From farmers markets and summer concerts to holiday celebrations and food festivals, Alpharetta hosts over 200 special events annually for people of all ages to enjoy. These events aren't just entertainment—they're how Alpharetta builds community, fosters a sense of belonging, and invites everyone to experience the city's best aspects.

dining and entertainment

where flavor meets fun

Top 3 Culinary Towns in the South

The Local Palate



Whether you're a foodie on the hunt for your next favorite dish or a thrill-seeker chasing your next adventure, Alpharetta invites you to indulge in its dynamic blend of tastes, tunes, and experiences. From award-winning restaurants and lively festivals to high-energy attractions and stylish shopping districts, you'll discover something for every preference.

ALPHARETTA BY THE NUMBERS

RECOGNITION

Certificate of Achievement for Excellence in Financial Reporting
for fiscal year 2024 from the Government Finance Officers Association (GFOA)

Distinguished Budget Presentation Award
for fiscal year 2026 from GFOA.

Insurance Services Office (ISO) Class 1 Rating

This certification, representing superior property fire protection capabilities, is based primarily on an evaluation of the city's water supply and distribution, fire department equipment, manpower, etc. Alpharetta is one of only 24 agencies in Georgia and 503 agencies nationwide, to receive an ISO Class 1 rating, the highest available.

Tree City USA
from the National Arbor Day Foundation for the 35th consecutive year.

RANKINGS

> A dense-suburban town north of Atlanta, Alpharetta offers its residents a balance between lively hubs with coffee shops and restaurants and quiet streets. Public schools in the area have been highly rated, and the town is ranked as the second-best place to raise a family in Georgia.
>
> — *Business Insider*

The 20 Best US Suburbs to Live in 2025 If You Want To Escape The City
BUSINESS INSIDER

10 Best Places To Live in Georgia (#2)
2025
TRAVEL+ LEISURE

#2 Best Place to Live in Georgia
#16 Best Small City to Live in the US
2025
U.S.News & World Report

2025 Best Places to Live in America
NICHE

5 Best Atlanta Suburbs
2025
LIVABILITY

5 Alpharetta-area High Schools Ranked Among Georgia's Top 30

Source: https://www.awesomealpharetta.com/about/

CITY DEPARTMENTS BY THE NUMBERS



** Data set forth above is based on prior-year values and not reflective of FY 2027 changes.*

Mission[4]

To make a positive difference in the community by efficiently managing public resources and providing effective services and leadership that exceed the expectations of our citizens.



Vision[5]

Our Community Vision is to advance Alpharetta as a signature City by:

- Offering the highest quality of environment for our residents and businesses.
- Fostering strong sense of community including safety and security.
- Providing a business climate that attracts the top echelon companies.

Our Community Vision serves as the guiding principle for the planning and operation of our city government, and each department structures its mission, goals, and objectives to facilitate achievement of our mission.



In summary, our vision for the future guides the city's decision-making process. As you read this document, you will notice that direct linkages are identified between the city's vision/strategic priorities and departmental goals & objectives as well as the projects set forth in the Capital Improvement Plan.

When funding initiatives (e.g., annual departmental budgets) are brought before the City Council for consideration, discussion is centered on how the initiatives link with the city's vision for the future.

[4] The Mission Statement details our City's reason for existence and embodies our philosophies, goals, ambitions, and character.

[5] The Vision Statement represents what we want our City to become and details how the City's future will look if we continue to achieve our Mission.

Financial Accounting Structure

The accounting policies of the city shall conform to the generally accepted accounting principles ("GAAP") as applicable to local governments.

The diverse nature of governmental operations and the necessity of assuring legal compliance preclude recording and summarizing all governmental financial transactions and balances in a single entity. From an accounting and financial management viewpoint, a governmental unit is a combination of several distinctly different fiscal and accounting entities, each having a separate set of accounts and functioning independently of each other.

Each accounting entity is accounted for in a separate "fund". A fund is defined as a fiscal accounting entity with a self-balancing set of accounts recording cash and other financial resources together with related liabilities and residual equities or balances, and changes therein, which are segregated for the purpose of carrying on specific activities or attaining certain objectives in accordance with special regulations, restrictions, or limitations.

The city's accounting records for governmental funds are maintained on a modified accrual basis with the revenues being recorded when available and measurable and expenditures being recorded when the services or goods are received, and the liabilities are incurred. Accounting records for the city's proprietary and fiduciary funds are maintained on an accrual basis.

Fund Classification

The city's accounting system is organized and operated on a "fund" basis and each fund is classified in one of three categories:

CLASSIFICATION	FUND TYPE
Governmental Funds	General Fund
	Special Revenue Funds
	Debt Service Fund
	Capital Project Funds
Proprietary Funds	Enterprise Fund
	Internal Service Funds
Fiduciary Funds	Pension Trust Fund
	Other Post Employment Benefit (OPEB) Trust Fund

Governmental Funds

These funds are accounting segregations of financial resources. Expendable assets are assigned to the various governmental funds according to the purposes for which they may or must be used; current liabilities are assigned to the fund from which they are to be paid; and the differences between governmental fund assets and liabilities is referred to as "Fund Balance". The primary measurement focus is "flow of current financial resources". In other words, are there more or less resources than can be spent soon as a result of transactions of the period? Increases in resources are reported in the operating statement as revenues or other financing sources, and decreases are reported as expenditures or other financing uses.

Proprietary Funds

These funds are sometimes referred to as "income determination," "non-expendable", or "commercial type" funds and are used to account for a government's on-going organizations and activities which are like those often found in the private sector. All assets, liabilities, equities, revenues, expenses, and transfers relating to the government's business and quasi-business activities, where net income and capital maintenance are measured, are accounted for through proprietary funds. The generally accepted accounting principles are those applicable to similar businesses in the private sector, and the focus of measurement is the economic condition of the fund as a result of the events and transactions of the period. Events and transactions that improve the economic position of a proprietary fund are reported as revenues or gains in the operating statement. Those events and transactions that diminish the economic position are reported as expenses or losses.

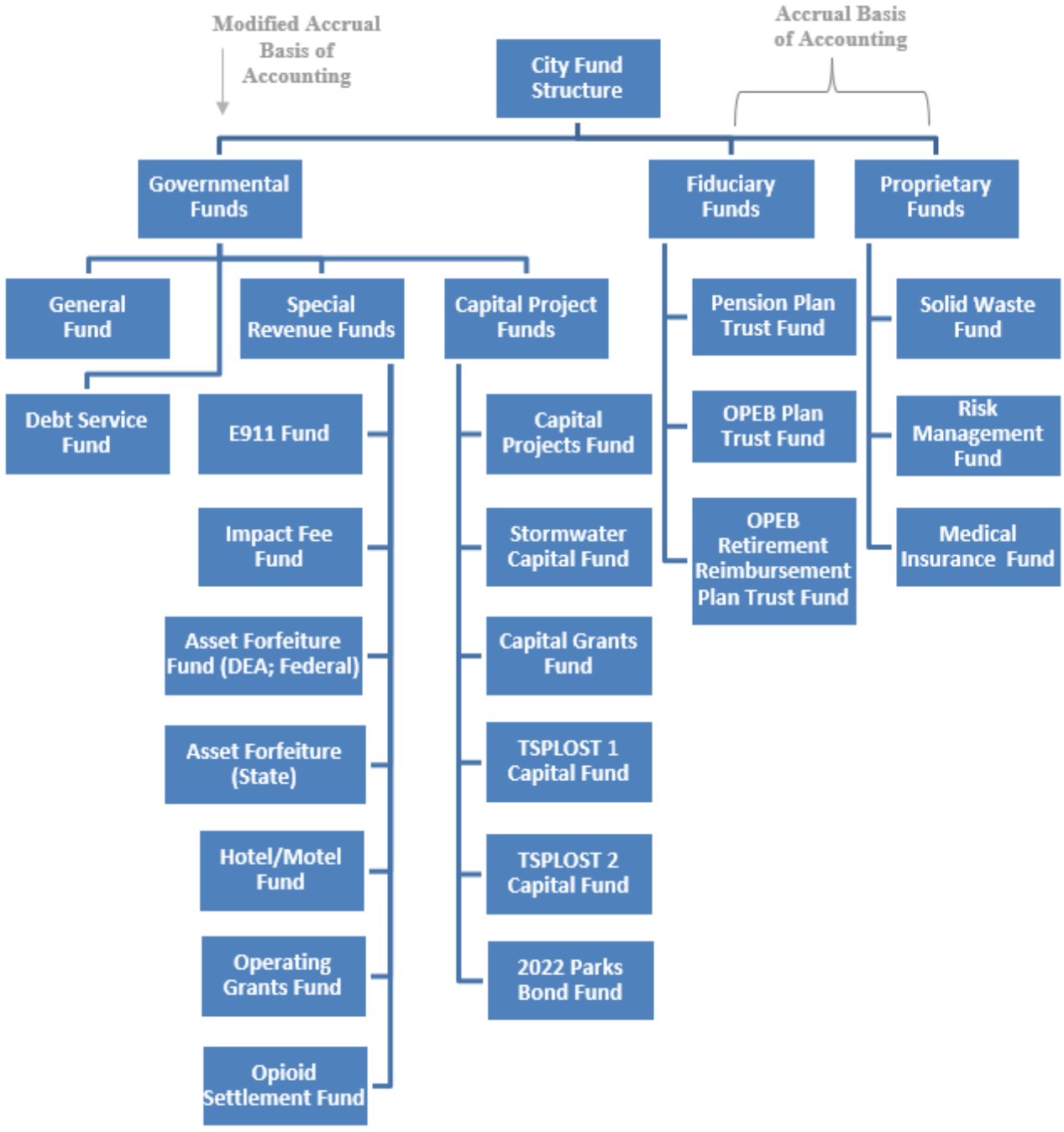
Fiduciary Funds

These funds are used to account for assets held by the city in a trustee capacity or as an agent for other governmental units and for other funds.

FINANCIAL ACCOUNTING STRUCTURE

Fund Structure

The city uses 15 governmental funds, 3 fiduciary funds and 3 proprietary funds as detailed below.



Fund Descriptions

The following section provides a narrative on each of the city's 21 funds:

General Fund (Governmental Fund)

The General Fund is the principal operating fund of the city and includes governmental activities such as police, fire, recreation, transportation, and other general governmental functions that are primarily funded with property taxes, utility taxes, franchise fees, state shared revenues, and charges for services, such as recreation program fees.

The General Fund utilizes the modified accrual basis of budgeting and accounting. On a modified accrual basis, revenues are recorded when both available and measurable. Expenditures are recognized when liability is incurred, except for: (1) principal and interest on general long-term debt which are recognized when due; and (2) annual employee leave and claims/judgments for litigation and self-insurance which are recorded in the period due and payable.

While debt service on voter-approved debt is funded through the Debt Service Fund, debt service on other obligations (i.e., Alpharetta Development Authority revenue bonds that are backed by the City through Intergovernmental Agreement) resides in each applicable Fund based on the identified funding source. As an example, the General Fund includes debt service for the Series 2013 Alpharetta Development Authority revenue bonds which were issued to fund a portion of the costs associated with the new Alpharetta campus of Gwinnett Technical College. The Hotel/Motel Fund also includes debt service associated with Alpharetta Development Authority revenue bonds (discussed in the following section).

Debt Service Fund (Governmental Fund)

This fund accumulates financial resources for the repayment of the city's voter-approved debt obligations including.

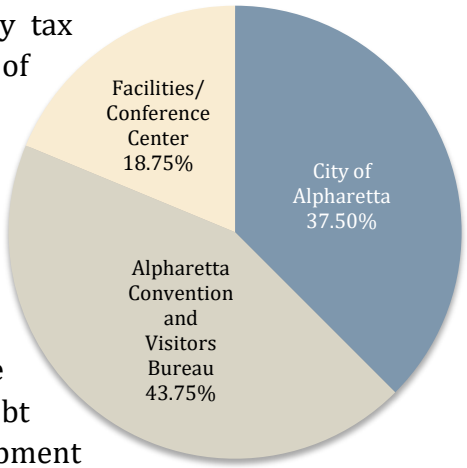
- **General Obligation Bonds, Series 2016**.
- **General Obligation Refunding Bonds, Series 2020** (refunding of the Series 2012 GO Bonds).
- **General Obligation Bonds, Series 2022.**

The Debt Service Fund utilizes the modified accrual basis of budgeting and accounting.

Special Revenue Funds (Governmental Funds)

Special revenue funds are used to account for specific revenues that are legally restricted to expenditures for specific purposes. All special revenue funds utilize the modified accrual basis of budgeting and accounting.

- **E911 Fund**: This fund accounts for fees received from users, or potential users, of the city's Emergency 911 System. The fee equals $1.50 monthly and is paid directly from wired, wireless (including prepaid cards), and voice-over-internet-protocol telecommunication providers, with expenditures occurring to maintain and run the system within the government. The city also provides emergency dispatch services to the City of Milton through an Intergovernmental Agreement. Funding under this agreement is based on remittance of Milton's E911 service fees and is accounted for within the E911 Fund. The Police Department manages the E911 Program.
- **Impact Fee Fund**: This fund accounts for fees assessed upon development activity. These fees are collected to pay for system improvements (recreation/parks, streets, and public safety) as detailed within the city's impact fee ordinance. The Community Development Department manages the Impact Fee Program.
- **Asset Forfeiture Funds (Federal/State)**: These funds account for revenues received from the enforcement of drug laws and the confiscation of property from drug offenders' arrests that can be used by public safety to aid in drug enforcement activity. Funds cannot be used to supplant the Police Department's normal operational budget. The Police Department manages the asset forfeiture programs.
- **Hotel/Motel Fund**: This fund accounts for occupancy tax collections from area hotels and motels for the purpose of promoting conventions, tourism, and trade shows, while providing funds to facilitate economic vitality in downtown areas. Currently, the city levies a hotel/motel occupancy tax of 8% on total rental charges.

  The chart to the right details the resulting revenue distribution. The Conference Center portion of the hotel/motel occupancy tax remains in the Fund to pay debt service costs associated with the Alpharetta Development Authority's Series 2016 Revenue Bonds [6] which were issued in 2016 to fund construction of a state-of-the-art conference center at the Avalon Development.

[6] The City is obligated via Interlocal Agreement to fund the debt service on this obligation.

- **Operating Grants Fund**: This fund accounts for resources received from federal, state, and local grants awarded to the city. Matching funds, which represent the city's financial investment, are also recorded within this fund. This fund accounts for operational grants only. Capital grant proceeds are recorded within the Capital Grants Fund. All operating grant funds follow the life-to-date budgeting process whereby budget is carried forward annually to cover Council approved projects. As such, only new appropriations are reflected in the annual budget document. Existing appropriations are reflected in the city's monthly financial management reports and can be accessed at www.alpharetta.ga.us.
- **Opioid Settlement Fund**: This fund accounts for Opioid Settlement proceeds. Specifically, the State of Georgia reached a $636 million agreement with three distributors and a major manufacturer of opioids. Approximately $517 million will come from the National Distributors' Settlement over the course of 18-years. An additional $118 million will come from the Janssen/J&J Settlement over the next 9 years.
    - The settlement allocates 25% ($159 million) of the total funds to local governments.
    - The State will receive 75% ($477 million) of the funding.

  All funds must adhere to approved purposes as described in the settlements.

Capital Project Funds (Governmental Fund)

These funds are used to account for the acquisition and construction of major items, such as buildings, infrastructure, parks, streets, and other major capital facilities. The city has six (6) capital project funds which are detailed below. All capital project funds follow the life-to-date budgeting process whereby budget is carried forward annually to cover Council approved projects. As such, only new appropriations are reflected in the annual budget document. Existing appropriations are reflected in the city's monthly financial management reports and can be accessed at www.alpharetta.ga.us. The capital project funds utilize the modified accrual basis of budgeting and accounting.

- **Capital Project Fund**: This fund accounts for the acquisition and construction of major items, such as buildings, infrastructure, parks, streets, and other major capital facilities, with a value of more than $25,000. Funding for these capital improvements typically comes primarily from a transfer of available fund balance within the General Fund. Appropriations are perpetual with only new appropriations recognized in the annual budget.
- **Stormwater Capital Fund**: This fund accounts for stormwater/drainage maintenance, repair, and/or improvement projects with a value in excess of $25,000. Funding for these capital improvements typically comes primarily from a transfer of

available fund balance within the General Fund. Appropriations are perpetual with only new appropriations recognized in the annual budget.

- **Capital Grants Fund**: This fund accounts for resources received from federal, state, and local grants awarded to the city. Matching funds, which represent the city's financial investment, are also recorded within this fund. This fund accounts for capital grants only. Operating grant proceeds are recorded within the Operating Grant Fund.
- **TSPLOST 1 Capital Fund**: This fund accounts for the collection of TSPLOST 1 (Transportation Special Purpose Local Option Sales Taxes) revenue and the expenditure on eligible transportation improvements and congestion mitigation initiatives. Fund appropriations are perpetual with only new appropriations recognized in the annual budget. This tax was imposed for the period of April 1, 2017, through March 31, 2022.
- **TSPLOST 2 Capital Fund**: This fund accounts for the collection of TSPLOST 2 (Transportation Special Purpose Local Option Sales Taxes) revenue and the expenditure on eligible transportation improvements and congestion mitigation initiatives. Fund appropriations are perpetual with only new appropriations recognized in the annual budget. This tax is imposed for the period of April 1, 2022, through March 31, 2027.
- **2022 Parks Bond Fund**: This fund accounts for the proceeds and associated expenditures resulting from the issuance of voter approved general obligation bonds, series 2022. Fund appropriations will be perpetual with only new appropriations recognized in the annual budget.

Fiduciary Funds

These funds are used to account for resources held for the benefit of parties outside the government. Fiduciary funds utilize the accrual basis of accounting and are appropriated in the annual budget (excluding the Pension Trust Fund) and reflected in the city's monthly financial management reports which can be accessed at www.alpharetta.ga.us.

- **Pension Plan Trust Fund**: This fund accounts for assets of the city's defined benefit pension plan. The assets in this fund cannot be used to support government programs or activities.
- **Other Post Employment Benefit (OPEB) Plan Trust Fund**: This Fund represents activity associated with the other post-employment benefit plan (OPEB). Historically, eligible retirees were offered the same health and prescription drug coverage as active employees. However, recent updates to the Plan, previously approved by City Council, have removed this option for employees ending service with the City on or after July 1, 2023.

- **Other Post Employment Benefit (OPEB) Retirement Reimbursement Plan Trust Fund**: This Fund accounts for the post-employment healthcare benefit and is funded through City operations (increased from 2% to 2.5% of payroll in fiscal year 2024).

Proprietary Funds

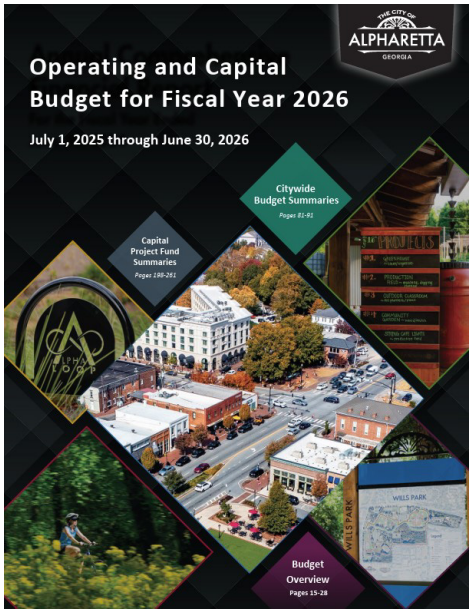
The city maintains two different proprietary fund types. Enterprise Funds are used to account for business-type activities whose operations are primarily funded by customer fees. Internal Service Funds are used to accumulate and allocate costs internally among the city's various functions. Proprietary Funds utilize the accrual basis of budgeting and accounting.

- **Solid Waste Fund (Enterprise Fund)**: This fund accounts for fees received from users of the city's solid waste program (i.e., garbage and trash collection). Services are provided on a user charge basis and managed through a contract with a private operator. The Finance Department manages the Solid Waste Program including billing, collection, and customer service functions.
- **Risk Management Fund (Internal Service Fund)**: This fund is used to account for expenses related to providing and administering the general liability, automotive liability, workers' compensation, and property insurance coverage for the city.
- **Medical Insurance Fund (Internal Service Fund)**: This fund accounts for activity under the City's Minimum Premium Plan (MPP) in accordance with Generally Accepted Accounting Principles.

  Accounting rules dictate the creation of an Internal Service Fund to track activity under an MPP. As such, this fund does not represent new costs. Rather, it represents a flow of funds from the Operating Funds (e.g., employer/employee premiums) that does have the effect of grossing-up the totals as the appropriations are reflected in multiple Funds. Under the MPP, the City and the medical insurer (CIGNA) agree that the City will be responsible for paying all claims up to an agreed-upon aggregate level, with the insurer responsible for the excess. The insurer will continue to process claims and administrative services. Through the MPP arrangement, the City can reduce premium taxes while maintaining coverage benefits. The MPP is still a fully insured medical plan.

Financial Reporting

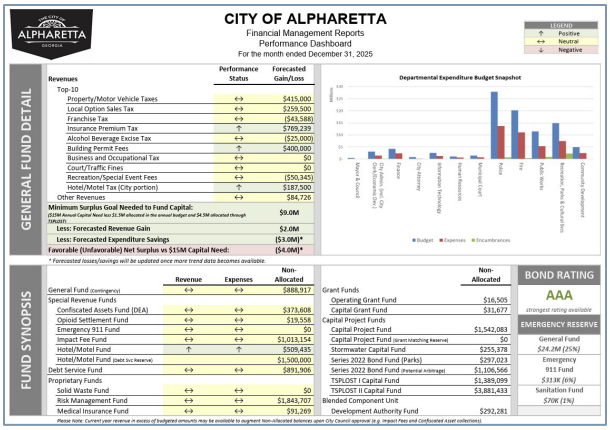
The Finance Department provides detailed financial reporting to meet the information needs of the government, authorities, regulatory agencies, and citizens/ stakeholders. In addition, the City Administrator, Mayor, Council, Department Heads, and the public shall have access to reports to allow them to monitor, regulate, and use as a basis for future financial decisions.



Operating and Capital Budget[7] (June-August)

The Operating and Capital Budget is a financial plan that outlines how public funds will be allocated to support essential services, infrastructure, and community priorities for the fiscal year. The Operating Budget funds the day-to-day operations of the City, including public safety, parks and recreation, transportation, and other essential services.

The Capital Budget focuses on long-term investments in infrastructure, such as roads, facilities, and utility systems, ensuring the sustainability and growth of the community. Together, these budgets reflect the City's commitment to responsible financial management, strategic planning, and enhancing the quality of life for our stakeholders (e.g. residents, businesses, etc.).


CITY OF ALPHARETTA
Financial Management Reports
Performance Dashboard
For the month ended December 31, 2025

GENERAL FUND DETAIL

Revenues	Performance Status	Forecasted Gain/Loss
Top-10		
Property/Motor Vehicle Taxes	↔	$415,000
Local Option Sales Tax	↔	$259,500
Franchise Tax	↔	($43,588)
Insurance Premium Tax	↑	$769,239
Alcohol Beverage Excise Tax	↔	($25,000)
Building Permit Fees	↑	$400,000
Business and Occupational Tax	↔	$0
Court/Traffic Fines	↔	$0
Recreation/Special Event Fees	↔	($50,345)
Hotel/Motel Tax (City portion)	↑	$187,500
Other Revenues	↔	$84,726
Minimum Surplus Goal Needed to Fund Capital: ($10M Annual Capital Need less $1.5M allocated in the annual budget and $4.5M allocated through ESPLOST)		$9.0M
Less: Forecasted Revenue Gain		$2.0M
Less: Forecasted Expenditure Savings		($3.0M)*
Favorable (Unfavorable) Net Surplus vs $15M Capital Need:		($4.0M)*

Departmental Expenditure Budget Snapshot

FUND SYNOPSIS

	Revenue	Expenses	Non-Allocated
General Fund (Contingency)	↔	↔	$888,917
Special Revenue Funds			
Confiscated Assets Fund (DEA)	↔	↔	$373,608
Opioid Settlement Fund	↔	↔	$19,558
Emergency 911 Fund	↔	↔	$0
Impact Fee Fund	↔	↔	$1,013,154
Hotel/Motel Fund	↑	↑	$509,435
Hotel/Motel Fund (Debt Svc Reserve)			$1,500,000
Debt Service Fund	↔	↔	$891,906
Proprietary Funds			
Solid Waste Fund	↔	↔	$0
Risk Management Fund	↔	↔	$1,843,707
Medical Insurance Fund	↔	↔	$91,269

	Non-Allocated
Grant Funds	
Operating Grant Fund	$16,505
Capital Grant Fund	$31,677
Capital Project Funds	
Capital Project Fund	$1,542,083
Capital Project Fund (Grant Matching Reserve)	$0
Stormwater Capital Fund	$255,378
Series 2022 Bond Fund (Parks)	$297,023
Series 2022 Bond Fund (Potential Arbitrage)	$1,106,566
TSPLOST I Capital Fund	$1,389,099
TSPLOST II Capital Fund	$3,881,433
Blended Component Unit	
Development Authority Fund	$292,281

BOND RATING
AAA
strongest rating available

EMERGENCY RESERVE
General Fund
$24.2M (25%)
Emergency 911 Fund
$313K (6%)
Sanitation Fund
$70K (1%)

Financial Reporting to the City Council[8] (monthly)

The Monthly Financial Management Reports provide a detailed snapshot of the City's financial performance throughout the fiscal year. These reports include key financial data on revenues, expenditures, and budgetary comparisons, helping to track the City's financial position in real time. By regularly reviewing these reports, City officials, residents, and stakeholders can stay informed about spending trends, budget adherence, and overall fiscal health. This transparency supports sound financial decision-making and reinforces the City's commitment to accountability and responsible financial management.

[7] Available for download from the City's website: https://www.alpharetta.ga.us/343/Annual-Operating-Capital-Budget.
[8] Available for download from the City's website: https://www.alpharetta.ga.us/347/Financial-Management-Reports..



Annual Comprehensive Financial Report[9] (November-December)

The Annual Comprehensive Financial Report (ACFR) is a detailed and audited document that provides a comprehensive overview of the City's financial position and activities for the fiscal year. Prepared in accordance with Generally Accepted Accounting Principles (GAAP) and Government Finance Officers Association (GFOA) standards, the ACFR includes financial statements, statistical data, and an in-depth analysis of revenues, expenditures, assets, and liabilities. The financial statements are independently audited by a certified public accounting firm to ensure accuracy, transparency, and compliance with financial reporting standards. This report serves as a key resource for residents, investors, and stakeholders, offering transparency into how public funds are managed and ensuring accountability in the City's financial operations.

Mauldin and Jenkins, Certified Public Accountants, LLC, have issued an unqualified ("clean") opinion on the City of Alpharetta's financial statements for the year ended June 30, 2025.



Annual Citizens Report[10] (November-December)

The Popular Annual Financial Report (PAFR or Annual Citizens Report) is a user-friendly summary of the City's financial activities, designed to make complex financial information more accessible to residents and stakeholders.

Based on the audited Annual Comprehensive Financial Report (ACFR), the PAFR highlights key financial data, budgetary trends, and major initiatives in a clear and concise format. This report enhances transparency by providing an overview of how public funds are managed and invested in the community. By reviewing the PAFR, residents can gain a better understanding of the City's financial health and its commitment to responsible stewardship of taxpayer dollars.

[9] Available for download from the City's website: https://www.alpharetta.ga.us/346/Audited-Financial-Statements.
[10] Available for download from the City's website: https://www.alpharetta.ga.us/341/Annual-Citizens-Reports.

Budget Process

The annual budget serves as the foundation for the city's financial plan and assists in control of the financial stability and health of the government. The Mayor and Council are legally required to adopt a balanced budget (i.e., revenues = expenditures) no later than the close of the fiscal year. The city's fiscal year runs from July 1st through June 30th, with the official fiscal year taken from the year ending date. For example, the FY 2027 Budget is prepared for the fiscal year commencing July 1, 2026, and ending June 30, 2027.

Annual Budget Process

Responsibility for funding recommendations contained within the annual budget rests with the Budget Review Committee ("BRC"), comprised of the City Administrator and Finance Director. The BRC maintains the primary responsibility of ensuring that funding requests are aligned with the city's strategic priorities (set by Mayor and City Council) and by extension, the strategic vision for the future, as well as the annual action plan. Additionally, the BRC performs a detailed review of revenues and expenditures that culminates in the recommended budget which is presented annually to the City Council for discussion and adoption during April-June.

Budget Methodology

The city's budget is created under a hybrid performance-based budgeting system. This type of budgeting system blends the traditional historical financial trend model with the performance-based model of identifying a particular level of performance for each type of service/program and the resources necessary to operate it, as well as describes the structure of the departments and the programs into which they are divided.

Beginning with each department's mission statement, which sets the direction for the department's activities, goals and objectives are developed that support the department's mission and, by extension, the city's strategic priorities. Goals and objectives should be SMART – Specific, Measurable, Achievable, Relevant, and Timed. Ultimately, the goals and objectives should result in departmental efficiency/effectiveness improvements which are then reflected in the appropriations process.

Departments, in partnership with the Finance Department, then develop a projected budget based on the previous year's budget/actual expenditure trend and amend for any new initiatives or discontinued/non-recurring initiatives.

The departmental budget is separated into the following components:

- *Mission Statement* – the statement must identify the particular purpose for the department and how it relates to the city's overall mission.

- *Goals & Objectives* – a listing of the fundamental goals and objectives which aid the department in achieving its mission. Goals stretch and challenge the department, but they must also be SMART. Direct linkages are identified between the city's strategic priorities and departmental goals & objectives.
- *Program/Expenditure Summary* – the budget for the department presented on both a department-wide and individual program basis and summarized by expenditure category:
  - Personal Services: salaries, overtime, and other compensation-related expenditures.
  - Maintenance & Operations: professional fees, repair & maintenance, general supplies, communications, and other operational related expenditures.
  - Capital: departmental machinery & equipment and other capital investment expenditures.
- *New Initiatives* – new services and/or capital investment.
- *Statement of Service and Performance Measures* – multi-year summary of departmental performance measurements.

Performance Measurement

The city views its performance measurement system as a priority and is continuing to develop and refine performance data and benchmarks. The city's performance measurement team utilizes a software application to assist in the tracking, analysis and reporting of performance measurement data and the comparison of core measures from identified benchmark cities. As you review the departmental sections of this document, you will notice refined measures for our Police, Fire, and Information Technology Departments that follow the city's updated model.

Council Retreat (January-February)

The budget preparation process commences annually in January/February with the City Council Retreat, including City Administration and key department personnel. The Retreat provides the dedicated time necessary for the City Council and executive staff to discuss the strategic issues facing the city and the associated effects on the upcoming budget. Discussion topics include all strengths, weaknesses, opportunities, threats, etc., facing the city and typically are categorized as follows: millage rates and property taxation; revenue generation/diversification; capital renewal/replacement and improvement; base-level service and operations; personnel compensation; service and operation improvements; bond issues in connection with capital improvement initiatives; etc. The Retreat provides a strategic framework and guiding priorities for the upcoming budget process.

Budget Preparation and Analysis (January-April)

In February, the Finance Department distributes a budget calendar and target budgets to departments for the coming year which is based on revenue forecasts and projections of current year expenditures, as well as the two prior year's actual expenditures. Included in the target budget are line-items for salaries and benefits (e.g., pension, health insurance, etc.); the department's current year's goals and objectives; and Capital Improvement Program worksheets (i.e., current year updates to the city's capital improvement plan).

Budget information is collected in three phases. The first two phases are collected simultaneously. Phase one requests are related to employee expenses. During this phase, finance staff forecasts the personnel services funding requirements (e.g., salary and benefits) for the upcoming budget. Departments are requested to submit a forecast of personnel-driven operational expenses such as uniforms, professional development, travel, communications, etc.

The second phase includes budget requests that relate to departmental operations. During phase two, city departments are directed to review their operations and provide a forecast of appropriations required to maintain current service levels.

Phase three, the final phase of data collection, includes funding requests for improvements to current service levels as well as new programs or services and capital improvement projects.

As departments formulate their expenditure requests, the Finance Department is preparing the corresponding revenue analysis and forecast. Revenue sources across all funds are analyzed using the expert judgment of department directors and staff, trend analysis, and economic forecasts to compile revenue estimates that are both accurate and conservative. The city maintains a conservative revenue forecasting philosophy aimed at mitigating the over-appropriation of expenditures based on inflated revenue estimates. Additionally, the city's aggressive pay-as-you-go capital program is supported by the conservative revenue philosophy through a level supply of excess fund balance (i.e., fund balance in excess of the city's 25% fund balance reserve) available for one-time capital investment.

Budget requests are completed by every department and submitted to the Finance Department where the data is assembled into the ClearGov budget preparation/reporting software.

Both expenditure requests and revenue projections are calculated and formatted for presentation to the City Administrator for initial review. During these meetings, discussion is focused on appropriations necessary to maintain current service levels. Appropriation growth in excess of a reasonable CPI figure will be thoroughly analyzed to determine the primary growth factors (e.g., fuel, utilities, and other items subject to volatile price fluctuations) and brainstorm ways to mitigate the increased costs. Additionally, new

programs, services, improvements to current services, and capital improvement projects are discussed in terms of how the initiatives link with departmental goals and objectives and by extension, the city's strategic priorities and vision for the future.

Upon completion of the departmental meetings, the BRC reviews base budgets within the context of the conservative revenue forecast and makes the necessary adjustments to balance the budget. Funding for new programs, services, or improvements to current services is prioritized based on needs assessment and balance against the goal of reducing the tax burden on our citizenry and stakeholders (e.g., millage rates). Funding for capital improvement projects is contained both within the general operational budget (annual capital contribution which is transferred from the General Fund into the Capital Projects Fund or Stormwater Capital Fund) as well as the companion capital project budget (one-time funding from excess fund balance). The consolidated balanced budget (i.e., operations and capital) is then prepared for presentation to the City Council.

City Council Budget Workshops (May-June)

City Council budget workshops are held in May-June. The workshops typically commence with distribution of the proposed budget which includes the following:

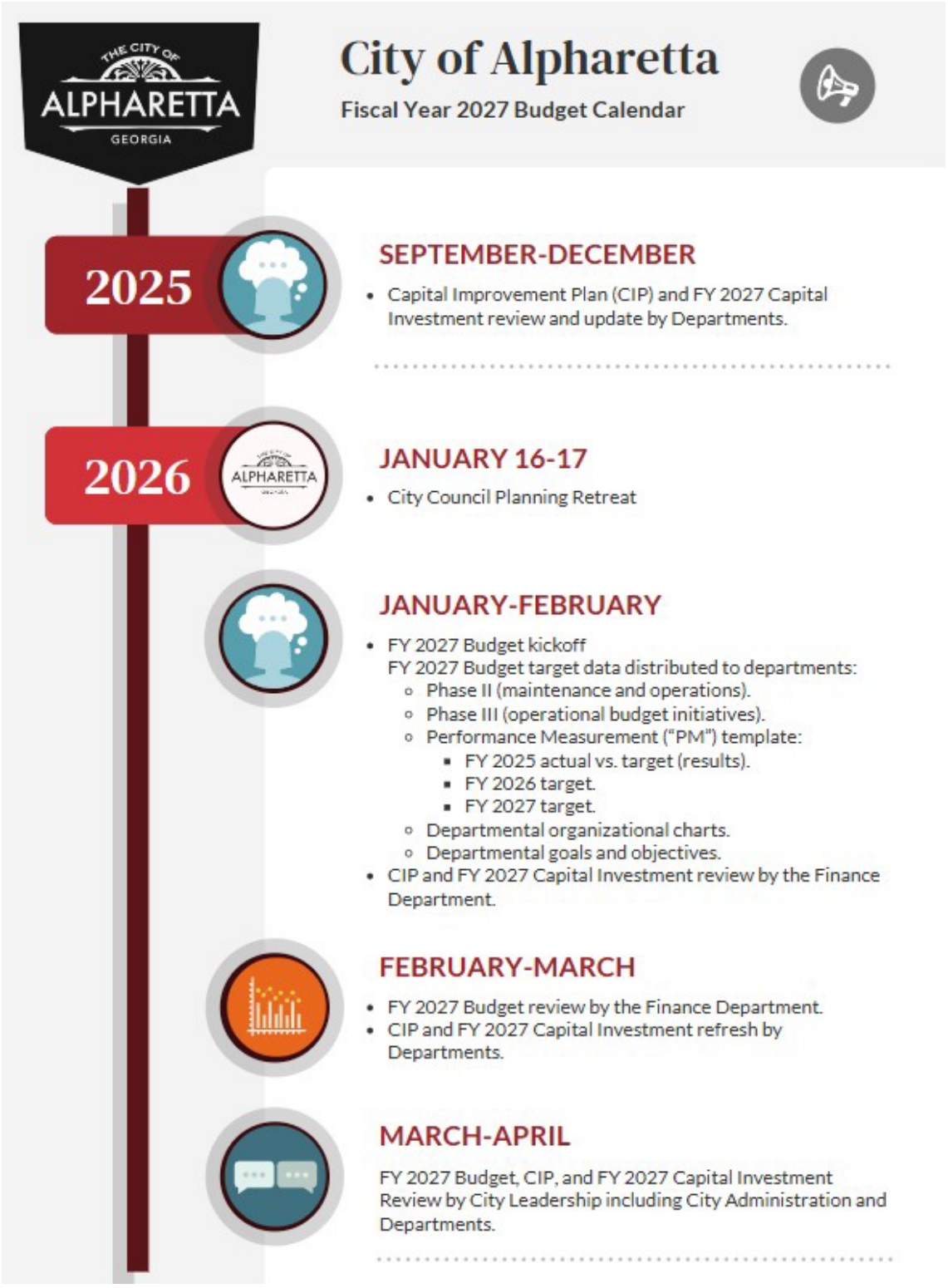
- Transmittal letter that summarizes the budget including current service levels, new initiatives, strengths/weaknesses/opportunities/threats facing the organization, and how the budget addresses those issues identified during the City Council Retreat.
- Departmental performance measurement listing.
- Departmental budget detail; project summary listing; and budget detail comparison that provides specific line-item allocations for the current and proposed budget years.

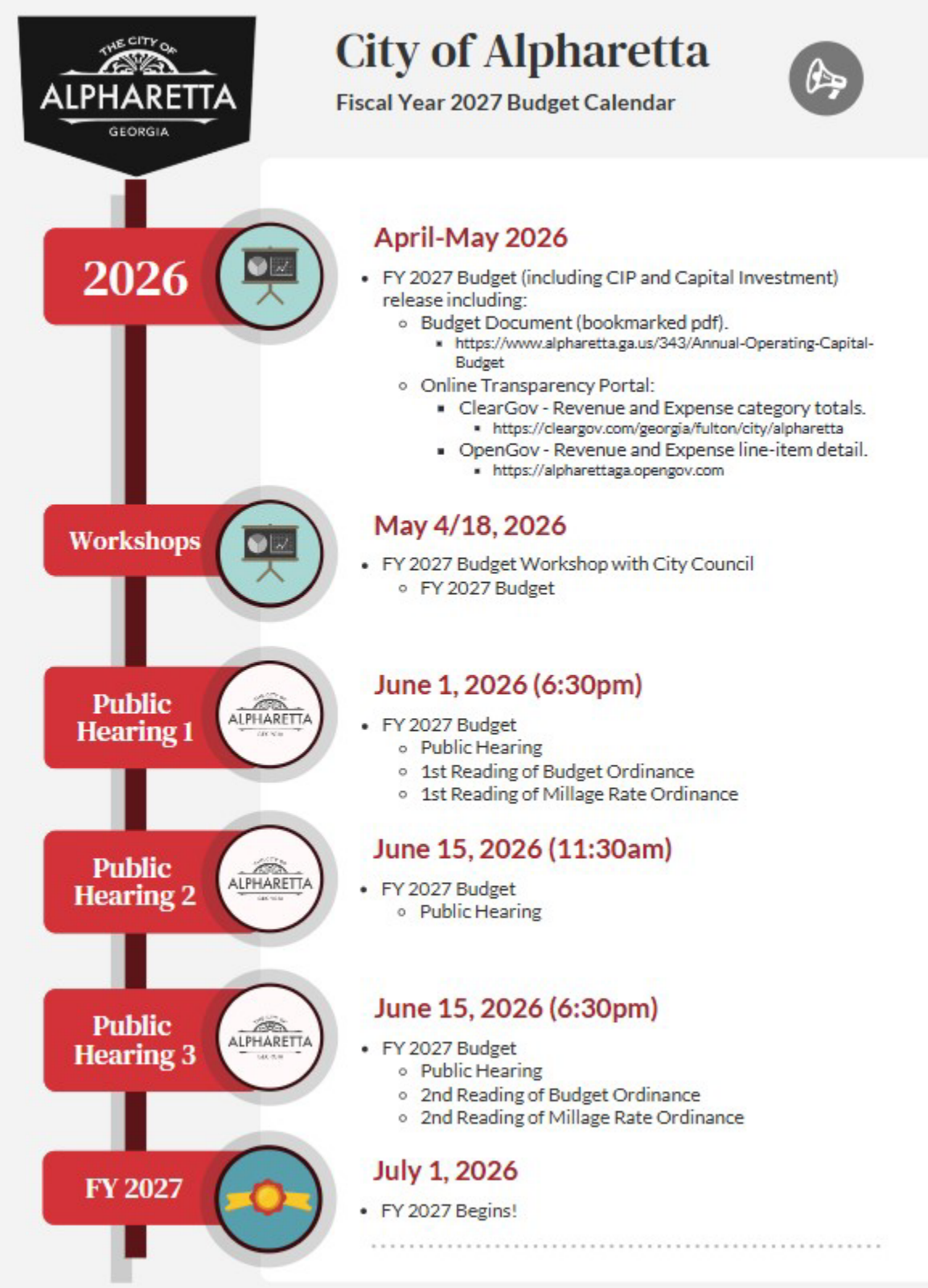
The Finance Director conducts public presentations, as needed, to summarize the budget and discuss the underlying economic growth trends. Discussion will focus on the strategic issues facing the organization for the upcoming budget year and the next several years and how this budget positions the city to respond in a prudent and proactive manner (e.g., periods of slowing economic growth, etc.). The City Council takes a lead role in analyzing the budget within the context of the city's strategic vision for the future.

Budget Adoption (June)

The budget and millage rate(s) are adopted via Ordinance through a public hearing process as provided under State law.

Budget Calendar




THE CITY OF
ALPHARETTA
GEORGIA
City of Alpharetta
Fiscal Year 2027 Budget Calendar
2026
April-May 2026
FY 2027 Budget (including CIP and Capital Investment) release including:
Budget Document (bookmarked pdf).
https://www.alpharetta.ga.us/343/Annual-Operating-Capital-Budget
Online Transparency Portal:
ClearGov - Revenue and Expense category totals.
https://cleargov.com/georgia/fulton/city/alpharetta
OpenGov - Revenue and Expense line-item detail.
https://alpharettaga.opengov.com
Workshops
May 4/18, 2026
FY 2027 Budget Workshop with City Council
FY 2027 Budget
Public Hearing 1
June 1, 2026 (6:30pm)
FY 2027 Budget
Public Hearing
1st Reading of Budget Ordinance
1st Reading of Millage Rate Ordinance
Public Hearing 2
June 15, 2026 (11:30am)
FY 2027 Budget
Public Hearing
Public Hearing 3
June 15, 2026 (6:30pm)
FY 2027 Budget
Public Hearing
2nd Reading of Budget Ordinance
2nd Reading of Millage Rate Ordinance
FY 2027
July 1, 2026
FY 2027 Begins!

BUDGET PROCESS

Budget Basis and Structure

The city's budget is developed on a modified accrual basis. State law requires that the city's budget be balanced – revenues equal expenditures.

On a modified accrual basis, revenues are recorded when both available and measurable. Certain fines and forfeitures, however, are recorded when received, as they are not susceptible to accrual. Expenditures are recognized when liability is incurred, except for: (1) principal and interest on general long-term debt which are recognized when due; and (2) annual employee leave and claims/judgments for litigation and self-insurance which are recorded in the period due and payable.

The legal level-of-control resides at the department level within a given fund. As such, reallocation of appropriations between line-items is acceptable within a given department with the following exceptions:

- Salary and benefit savings due to vacancies are restricted from reallocation to cover operating expenditures except in the case of funding temporary labor assistance; and
- Capital appropriations are restricted to the specific purpose set forth in the budget and cannot be reallocated except through approval by City Administration and/or the City Council.

Budget amendments that cross departments must be approved in advance by the City Council. As such, these amendments are typically brought for consideration by City Council during the mid-year budget review process.



Operating Initiative Requests

Executive Summary

General Fund	Revenue	Expense	Net Cost	Capital Component
Funding Available for Operating Initiatives:	**$ -**	**$ 27,500**	**$ 27,500**	
Recommended Initiatives:				
Information Technology				
ESRI ArcGIS Indoors (new equipment/software)	-	16,000	16,000	-
Recreation, Parks, and Cultural Services				
Holiday Lighting along Roswell Street and Canton Street	-	11,500	11,500	50,000
	$ -	**$ 27,500**	**$ 27,500**	**$ 50,000**

Recommended operating initiatives include expenditure adjustments of $27,500 and have been programmed into departmental operating budgets. Additionally, one recommended operating initiative includes capital funding requirements of $50,000 which is programmed within the Fiscal Year 2027 capital plan.

Operating Initiatives not recommended for funding at this time total $2.4 million (net of revenue recapture) and include capital investment requirements of $214,500.

Fiscal Year 2027 Annual Action Plan

The City Council Retreat during January 2026 set forth priorities to guide the construction of the FY 2027 budget including operations and capital investment. These priorities were condensed into an Annual Action Plan and are detailed within the section of this document entitled *Fiscal Year 2027 Annual Action Plan* with the components set forth below:

- Strategic Growth and Redevelopment of North Point
- Safe and Welcoming Community
- The Alpha Loop and Greenway
- Downtown Alpharetta
- Communications that Connect
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance
- Transportation and Traffic
- People Focused Workforce
- Economic Development

Detail (Recommended Operating Initiatives)

General Fund

Information Technology

ESRI ArcGIS Indoors (new equipment/software) **$16,000 (year 1)**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for funding to purchase equipment (year 1) and software (ongoing) related to ESRI ArcGIS Indoors technology.

ArcGIS Indoors provides powerful data management tools and focused apps to enhance operations, maintenance, safety, security, and wayfinding within facilities. Visualize people, spaces, assets, and incidents on floor-aware 2D and 3D maps, modernize asset and space management, improve situational awareness in emergencies, and transform occupant and visitor experiences

The components of the system will include the ArcGIS Indoors software from ESRI and a handheld 3D scanner. This will allow city staff to collect 3D images of the inside city buildings. There is also the use of the system to "map" the inside of critical structures such as schools, churches and others that can be very useful in emergency situations.

Operational costs for FY 2027 include handheld 3D scanner equipment ($5,000) and ongoing software licensing fees ($11,000). FY 2028 costs and beyond will total $11,000 annually and increase at software-inflationary rates.

Recreation, Parks, and Cultural Services

Outdoor Electrical Connections for Roswell Street and Canton Street (Holiday Lighting; $11,500 operations/$50,000 capital) **$11,500**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: This request is contingent upon funding the one-time capital request for FY 2027 ($50,000) for the installation of twenty-five (25) permanent outdoor electrical service connections in designated tree wells within the City's public right-of-way along Roswell Street and Canton Street. Each installation will include underground conduit, wiring, weather-resistant electrical components, and code-compliant connections designed for long-term outdoor use.

Installing permanent electrical service will:

- Improve safety by avoiding temporary wiring and surface cords.
- Enhance reliability and consistency of holiday displays.

- Support expanded seasonal programming and special events.
- Preserve streetscape aesthetics through concealed infrastructure.

The electrical service will support seasonal holiday decor, promoting community engagement and downtown vibrancy.

This request is for funding to cover the annual installation, removal, and storage of holiday lighting for the Roswell Street and Canton Street area. This will enhance the Downtown Alpharetta experience during the holiday season by implementing a cohesive, high-quality outdoor holiday lighting program along Roswell Street and Canton Street. The initiative aims to increase foot traffic, support local businesses, reinforce Alpharetta's brand as a premier destination, and create a safe, festive public area. Improved ambient lighting enhances visibility and perceived safety during evening hours. By expanding the holiday lighting to Roswell Street and Canton Street, it reinforces Alpharetta's downtown identity with a consistent, photo-worthy streetscape.

Detail (Unfunded Operating Initiatives)

OPERATING INITIATIVES NOT RECOMMENDED FOR FUNDING AT THIS TIME

Citywide

Augment Annual Capital Contribution to FY 2025 funding level $1,042,405

Fiscal Year 2027 Annual Action Plan:

- Strategic Growth and Redevelopment of North Point
- Safe and Welcoming Community
- The Alpha Loop and Greenway
- Downtown Alpharetta
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance
- Transportation and Traffic
- Economic Development

Description: Current infrastructure and asset maintenance cost trends highlight a capital funding target of $15 million annually (milling/resurfacing, fleet, stormwater, facility upkeep) through various means such as TSPLOST, Fund Balance, and an annual capital contribution from the General Fund.

This annual General Fund contribution is currently targeted at $6 million. The FY 2026 annual General Fund contribution was $1.5 million. Due to revenue constraints, the General Fund capital contribution has been reduced to approximately $475,000 in the draft proposed budget for FY 2027. An additional $1.04 million would be needed to bring funding in 2026 to that of the funding in 2025. A portion of this funding could be used towards an energy savings performance contract (ESPC phase) under the City's current facility condition assessment project which is focused on capital facility maintenance and improvements. This appropriation also allows the City more flexibility in operations should revenues continue to decline.

General Fund

City Clerk

Records Coordinator (new position; +1 FTE) **$102,500**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Communications that Connect
- Recreation, Parks, and Culture
- People Focused Workforce

Description: The City Clerk is requesting the addition of a Records Coordinator position (pay grade 305; assumed 5% above pay grade minimum) to better serve the City of Alpharetta and its current records request and records management needs.

Previously, the City employed a city-wide Records Manager, under the direction of the City Clerk and helped facilitate record retention and destruction across all departments. That position was eliminated in March 2019, and the job duties were then reassigned to all pertinent departments.

The City has hundreds of containers housing physical documents at an off-site storage facility and has also acquired hundreds of boxes of original files from our former city attorney's office, who represented the City for over 20 years. These documents need to be reviewed and catalogued for compliance with the state's local government record retention schedule and for preservation of the City's historical records.

Since 2020, the City has experienced a significant increase in the number of open records requests, litigation discovery requests, pending litigation documentation holds, and complex open records requests. Specifically, the City Clerk's Office has received, on average over the past three (3) years, 301 record requests each year. Additionally, the City Clerk's Office handles any records requests involving pending or potential litigation or records requests that have been submitted to other departments and were submitted by attorneys or media outlets.

The City Clerk's Office recommends the creation of a new full-time position to address the growing need for managing and reviewing open records requests, while also coordinating records retention and destruction efforts city wide.

Personnel costs are estimated at $99,500 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer and/or phone, etc.), software, general supplies, etc. totaling $3,000.

Finance

Reorganization of the Budget & Procurement Division **$157,500**
(1 new position; reclassify 2 existing positions)

Fiscal Year 2027 Annual Action Plan:

- Strategic Growth and Redevelopment of North Point
- Safe and Welcoming Community
- The Alpha Loop and Greenway
- Downtown Alpharetta
- Communications that Connect
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance
- Transportation and Traffic
- People Focused Workforce
- Economic Development

Description: The Finance Department is proposing a reorganization of the Budget & Procurement Division to better serve the City of Alpharetta and its current and forecasted needs.

The Finance Department has had no growth in personnel in over 20 years despite significant growth in its service population (both in terms of citizens as well as City staff). More specifically, Finance Department staffing has declined over that period. Most recently, Finance is the only department that still has not recovered staffing removed during the COVID budget reductions.

The Finance Team has adapted to demand growth over the last two decades through automation and efficiency measures in lieu of staffing growth. The most impactful measures being the implementation of technology that has removed many paper-based processes for the department which greatly improved the efficiency of our existing staff. That said, there are still other initiatives that the Department would like to improve upon, but it is not possible given staffing constraints (e.g. user-department training, vendor outreach, etc.).

Current Status

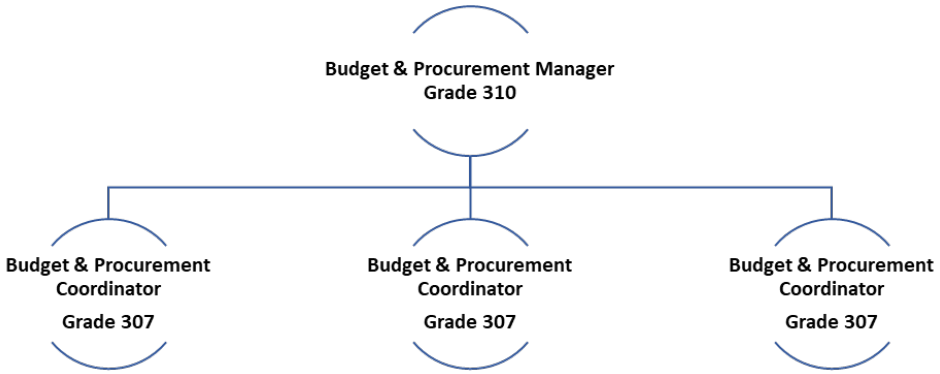
The Budget & Procurement Division staff totals 4 full time positions, and their operational responsibilities include:

- Managing and facilitating the financial transaction life cycle (liaison to our departments)
  - *budget planning, preparation, and management.*
  - *purchasing (including quotes, bids, RFP, etc.).*
  - *invoice/payment verification and processing.*
- Managing and facilitating the city's financial reporting
  - *annual budget documents.*
  - *monthly financial management reports.*
  - *annual citizens report (PAFR).*
  - *immigration reporting to State.*

- Administering city contracts.
- Developing revenue/expenditure forecasting models, financial Impact of proposed city activities, and long-range financial planning.
- Administering the financial transparency program (OpenGov, Socrata capital project dashboard, etc.).

The Division is structured to provide a liaison approach to service delivery for our departments. Specifically, one team member is assigned to each of our customer departments and assists with the entire lifecycle needs (budgeting, procurement, invoice review, receipt review, compliance, etc.).

The Division includes 4 full-time positions with the organizational structure as follows:



Staffing has declined from 5 full-time positions over the referenced 20-year period to the staffing level of 4 positions.

On an annual basis, the Division reviews over 800 purchase order requests, over 13,000 invoices, over 8,800 procurement card transactions, 40 formal procurement solicitations (varies), in addition to the general budget (preparation, review, amendments), procurement, and reporting obligations (e.g. monthly financial management reporting, State immigration reporting (E-Verify), TSPLOST capital reporting, etc.

Issues

The growth in existing service demand coupled with potential avenues for improvement has resulted in this proposed reorganization.

- Existing Service Demand – existing service demand has necessitated that staff focus on core functions to ensure delivery of the vital services needed to run City operations. Specifically, transaction-level review (invoices, procurement-card transactions, requisitions, budget amendments) and formal procurement solicitation review, issuance, and management. Just maintaining existing service demand often requires staff to work more than the normal work week including the occasional weekends.

- Dedicated Procurement Team – while the current Budget & Procurement liaison structure provides benefits for our user departments (e.g. one-stop-shop for questions, contacts, etc.), it has the added effect of limiting the specialization needed for those highly technical professions such as procurement. The desire is to have a team dedicated, trained, and certified for procurement activities.
- Vendor Outreach – the Division desires to engage in a more active vendor outreach program that educates vendors on the government procurement process with the goal of increasing vendor participation on City contracts. Current staffing constraints limit vendor outreach capabilities.
- Employee Recruitment – the Division has benefited from low turnover. This has masked a weakness in the current organizational structure. Namely, procurement and budget are two separate professions and rarely do employees have experience in both (unless they come from smaller organizations that do not allow for specialization or have operated as finance department managers/directors). The result is that it limits the attractiveness of position openings to professionals. Effectively, you end up having to hire one specialization and train for the other. This limits employee effectiveness in the short term.
- employees trained in procurement remains a weak point from an employee recruitment perspective.
- City training – the Division desires to engage in a more structured training program for City staff that includes (a) on demand recorded training sessions along with (b) in person training held throughout the year. Current staffing constraints limit City training to one-on-one questions/answers with those department team members directly responsible for the purchasing/budget functions. An expanded training presence would allow for the education of team members throughout the organization that may benefit from the knowledge.

Reorganization

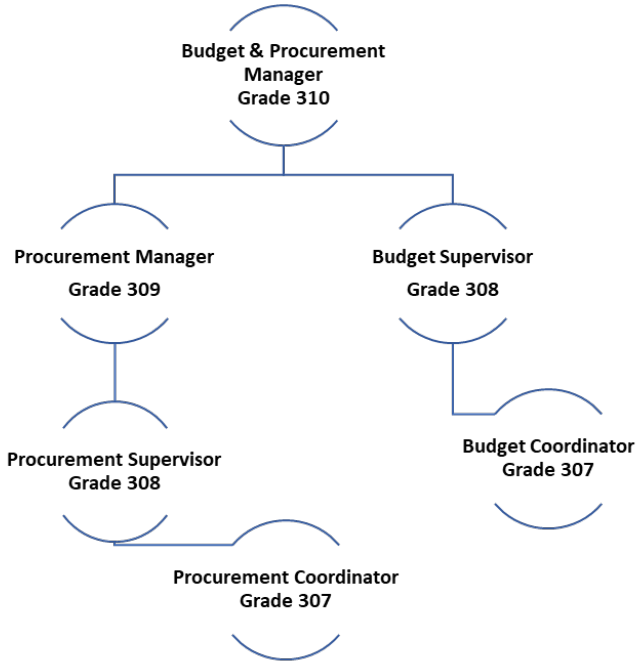
The Division is proposed to reorganize and separate the budget and procurement functions so that each team will have dedicated professionals focused on those distinct specialties while also allowing the staffing capacity to improve on the issues identified above.

Inherent in this reorganization is the following:

- Addition of 2 positions:
  - Procurement Manager (pay grade 309) – requested in FY 2027.
  - Procurement Coordinator (pay grade 307) – requested in FY 2028.
- Reclassifying of 2 positions:
  - Procurement Supervisor (pay grade 308; reclassify a current Budget & Procurement Coordinator position) – requested in FY 2027.

- Budget Supervisor (pay grade 308; reclassify a current Budget & Procurement Coordinator position) – requested in FY 2027.

The reorganized Division would include 6 full-time positions with the organizational structure as follows:



FY 2027: Annualized personnel costs associated with the new Procurement Manager position and two reclassifications are estimated at $154,000 annually and reflect salary and benefit costs only.

Operational costs in year one includes professional development, technology equipment (computer and/or phone, etc.), software, general supplies, etc. totaling $3,500.

Public Works

Construction Manager - Infrastructure (new position; +1 FTE) $141,400
($141,400 operations/$55,000 capital)

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: Public Works is requesting the addition of a Construction Manager position (pay grade 309; assumed 5% above pay grade minimum).

The City allocated over $4 million last year and is planning to do such over the next 10 years towards stormwater work throughout the City. Much of the construction work is contracted out to contractors to resolve various stormwater issues. Work varies from replacing a structure, lining, or replacing a pipe, or a large-scale construction project.

Due to the number of incoming projects and programmed projects, the Department is unable to adequately oversee construction oversight of the contractors in the field for the installation of City maintained infrastructure. Public Works is requesting an Infrastructure Construction Manager Position to oversee various field operations regarding stormwater improvements. The position not only requires knowledge of reading construction plans, communication skills with the public and contractors, as well as problem-solving skills when unknown issues arise in the field.

Public Works currently has seven stormwater projects in design or construction soon to be procured, over 1 million dollars a year in pipe lining, and numerous stormwater repairs (catch basin tops, grouting of manholes/pipes, and pipe replacements) throughout the City. Public Works staff is already committed to overseeing construction management of the Park's Bond Projects, TSPLSOT I/II projects, as well as capital projects.

Personnel costs are estimated at $133,900 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer, phone, iPad, etc.), professional development, uniforms, general supplies, and fuel costs totaling $7,500. There is a companion one-time capital request for $55,000 that includes funding for a vehicle purchase (and upfitting).

Facility Operations Manager (new position; +1 FTE) $141,400
($141,400 operations/$71,500 capital)

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: Public Works is requesting the addition of a Facility Operations Manager position (pay grade 309; assumed 5% above pay grade minimum).

The City embarked on an energy audit as well as a facility assessment over the last year. The report outlines various capital initiatives and improvements to all the City's facilities. Currently, there is one individual overseeing the crews accomplishing work orders and overseeing vendors accomplishing various tasks in the facilities (electrical, mechanical,

structural, painting, etc.). This position will be responsible for overseeing execution of the program, procuring vendors to implement various improvements, maintain the software system associated with the facility assessment, and oversee the Engineering Technician(s) working in the Facility Group. Separating the responsibilities within the Facilities Group will enable supervisors to spend more time ensuring work is accomplished meeting the expectations of the City and enable individuals to become proactive instead of reactive when it comes to implementing improvements.

Personnel costs are estimated at $133,900 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer, phone, iPad, etc.), professional development, uniforms, general supplies, and fuel costs totaling $7,500. There is a companion one-time capital request for $71,500 that includes funding for a vehicle purchase (and upfitting).

Infrastructure Crew (new positions; +4 FTE) $363,700
($363,700 operations/$88,000 capital)

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: Public Works is requesting the addition of the following new positions:

- +1 FTE - Public Works Crew Leader position (pay grade 305; assumed 5% above pay grade minimum).
- +2 FTEs - Public Works Technician II position (pay grade 303; assumed 5% above pay grade minimum).
- +1 FTE - Public Works Technician I position (pay grade 302; assumed 5% above pay grade minimum).

Currently the Public Works Department has 2 crews of 4 individuals that handle repairs to stormwater infrastructure, curb and gutter, sidewalks (concrete and brick paver), and City roads. One of the biggest challenges the department faces these days is making timely repairs to sidewalks. The Department maintains over 235 miles of sidewalk in the City, majority of the sidewalk is concrete. Over time, sidewalks have settled, cracked, and/or tree roots have uplifted the sidewalk causing trip hazards. Crews can accomplish repairs primarily in subdivisions. This crew will be able to handle concrete and brick paver sidewalk repair, curb and gutter repair, and other concrete work within the City's right of way. Work along busier streets throughout the City require significant traffic control measures and the crews are not equipped size wise to handle work of this nature. A crew of four individuals will consist of a Crew Leader, (2) Tech II's and (1) Tech I.

Personnel costs for the four new positions are estimated at $353,700 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer, phone, iPad, etc.), professional development, uniforms, general supplies, and fuel costs totaling $10,000. There is a companion one-time capital request for $88,000 that includes funding for a vehicle purchase (and upfitting).

Recreation, Parks, and Cultural Services

Parks Supervisor II – Southern District (new position; +1 FTE) $109,900

Fiscal Year 2027 Annual Action Plan:

- Strategic Growth and Redevelopment of North Point
- Safe and Welcoming Community
- The Alpha Loop and Greenway
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: Recreation, Parks, and Cultural Services is requesting the addition of a Parks Supervisor II position (pay grade 306; assumed 5% above pay grade minimum).

To Improve efficiency for the of delivery existing services, the Recreation, Parks, and Cultural services department is requesting a Parks Services Supervisor II to execute the maintenance and operation plan for the Southern Parks District (Greenway, Alpha Loop, and North Point Corridor). The Southern District Park Services team maintains and operates over 450 acres of park land which includes approximately fifteen (15) miles of the Big Creek Greenway system, portions of the Alpha Loop, six (6) Greenway Access Parks, four (4) Passive Parks and the Program Support of the Preston Ridge Recreation Center. Prior to 2019, the Southern District had been operating with the leadership of a team supervisor. Due to the growth resulting from the 2016 Bond Initiative, this position was reallocated as part of a department restructuring plan.

Over the past five years, the city has added over two (2) miles of Greenway trail connecting to the Forsyth County Greenway, Water Road Park, new portions of the Alpha Loop and the Preston Ridge Community Center to this area. Maintenance support from outsourced services to supplement this absence has reached its saturation point. The expectation of immediate response and daily service can only be met with the addition of more city staff. The anticipated addition of the Encore Gateway Park and the Alpha Link which will connect the Alpha Loop to the Greenway will also be under the operational control of this team. The additional demand on this division requires the addition of a supervisor to achieve a high service standard for this area.

Personnel costs are estimated at $106,900 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer and/or phone, etc.), uniforms, general supplies, etc. totaling $3,000. No additional vehicle is needed with this request.

Community Agriculture Program/Operational Funding **$18,250 (revenue)**
$68,000 (expense)

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description:

- Summer Camp Expansion (revenue = $18,250; expenses = $62,000)

  The Community Agriculture Summer Camp Expansion initiative will increase the capacity, accessibility, and program scope of the City's existing summer community agricultural camp. By adding the camp, the expansion will serve additional youth participants, enhance curriculum offerings, and strengthen partnerships with local agricultural organizations and community stakeholders. Demand for the Community Agriculture Summer Camp has exceeded current enrollment capacity in recent seasons, resulting in waitlists and limited access for residents. Additionally, increased interest in food systems education, sustainability practices, and hands-on agricultural experiences highlights the need for expanded programming.

  The Community Agriculture Summer Camp Expansion directly advances the City of Alpharetta's strategic priorities by enhancing quality of life, supporting sustainable community development, strengthening economic vitality, and demonstrating responsible stewardship of public resources.

  The Summer Camp Expansion totals $62,000 and includes $43,000 in personnel services costs (camp director, two camp counselors, as well as other seasonal staffing costs) and $19,300 in operational costs (instructor fees, supplies, etc.). Revenue generation is conservatively estimated at $18,250.

- Co-Hosting Community Agriculture Conference ($6,000)

  The City of Alpharetta's Community Agriculture Division will co-host the Green Thumb Grow Together Conference in New York in partnership with regional agricultural organizations, educational institutions, and local nonprofits. Interest in local food systems, sustainability practices, and community agriculture continues to grow among residents, educators, small businesses, and regional stakeholders. The conference will serve as a multi-day event focused on sustainable agriculture, urban farming, food systems, environmental stewardship, and community engagement.

  This initiative will position Alpharetta as a regional leader in sustainability and community-based agricultural education while supporting the City's strategic priorities related to quality of life, economic vitality, and responsible stewardship.

Community Development

Development Services Engineer (new position; +1 FTE) **$160,100**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community

Description: The Community Development Department is requesting the addition of a Development Services Engineer position (pay grade 309; assumed 95% of pay grade midpoint) to better serve the City of Alpharetta.

State regulations for hydrology reviews have increased the workload demand, creating the need for additional staffing. Although staff has implemented efficiency improvements, these measures have not offset the expanded scope and volume of required reviews. These changes in regulations have caused staff reviews to increase from 65 hydrology studies per year to over 200 per year, over the last five years. These reviews can take significantly longer than a site plan review. Currently, the equivalent of half of a full work year is dedicated solely to hydrology study review, limiting the team's capacity to provide timely public assistance.

An additional engineer is necessary to maintain compliance with state requirements, manage the sustained increase in technical review volume, and ensure consistent service delivery. If this position is approved, the existing Development Services Engineer role will be retitled to Senior Development Services Engineer (no impact to compensation) to align with the Public Works Department's titling structure for paygrades 309 and 310 engineers.

Personnel costs are estimated at $153,100 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer and/or phone, etc.), training, uniforms, etc. totaling $7,000.

E911 Fund

Police (E911 Fund)

Administrative Assistant II (new position; +1 FTE) **$101,250**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- People Focused Workforce

Description: The Public Safety Department is requesting the addition of an Administrative Assistant II position (pay grade 304; assumed 5% above pay grade minimum).

This position will assume primary responsibility for processing and completing open records requests related to CAD reports, 911 call audio, radio traffic, Preferred Live Video, and other 911-related media. Duties will include performing legally and procedurally mandated redactions in compliance with the Freedom of Information Act (FoIA) and Georgia law.

Establishing a dedicated role for open records processing will relieve 911 Shift Supervisors of this responsibility, enabling them to focus more effectively on managing their shifts and personnel. This specialization will improve operational efficiency by ensuring requests are completed promptly within the State of Georgia's mandated timelines, reducing the risk of liability, and ensuring adherence to FoIA requirements.

Additionally, having a single position dedicated to this task will minimize the delays caused by task-switching that are inherent in the Shift Supervisors' multifaceted roles. As a result, the processing time for open records requests is expected to decrease significantly, enhancing overall departmental performance, and ensure the timely and accurate fulfillment of public and legal obligations. This position would include secondary job duties, including performing monthly NCIC/GCIC validations - yet another current responsibility of 911 Shift Supervisor's that distracts from their primary responsibilities of managing shift operations. Validations require tedious and meticulous auditing to ensure the most accurate and up to date information is on the Criminal Justice Information System.

Personnel costs are estimated at $92,800 annually and reflect salary and benefit costs only. Operational costs include training, travel, supplies, equipment and uniforms, and total $8,450.

Citywide Budget Summaries

Overview

The *Citywide Budget Summaries* section is intended to provide readers with an overall understanding of the city's fiscal year 2027 budget. The following schedules provide readers with revenue and expenditure summaries from several different perspectives including:

- **Citywide Budget Summary by Fund**

  This section provides a summary/narrative of FY 2027 budget data by fund type (e.g., General Fund, Special Revenue Funds, etc.).

- **Citywide Budget Summary by Revenue Source**

  This section provides a summary/narrative of FY 2027 budget data by revenue source (i.e., Property Taxes, Other Taxes, Charges for Services, etc.). Please refer to the specific Fund Summaries section (e.g., General Fund Summary, Special Revenue Fund Summaries, etc.) of this document for more detailed information about the city's various revenue sources.

- **Citywide Budget Summary by Department Expenditures**

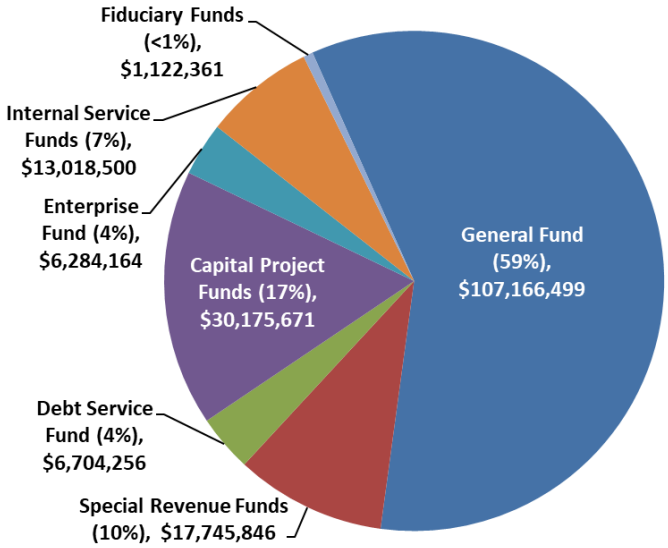
  This section provides a summary/narrative of FY 2027 budget data by department expenditures (e.g., City Administration, Public Safety, etc.). Please refer to the *Departmental Summaries* section of this document for more detailed information about each department's expenditures.

- **Citywide Budget Summary by Expenditure Category**

  This section provides a summary/narrative of FY 2027 budget data by expenditure category (e.g., Personnel Services, Maintenance & Operations, etc.).

Summary by Fund Type

FY 2027 Citywide Budget totals $182 Million



The Fiscal Year 2027 budget for all funds totals $182 million. The city budget includes appropriations for the following fund types:

General Fund: The city's General Fund is its largest fund and includes governmental activities such as police, fire, recreation, and other general governmental functions that are primarily funded with property taxes, utility taxes, franchise fees, and charges for services, such as recreation program fees.

Special Revenue Funds: These Funds are established to account for revenues that are restricted by statute, ordinance, or resolution for a specific purpose. Appropriated Funds include E911 Fund, Impact Fee Fund, and the Hotel/Motel Fund.

Capital Project Funds: These Funds are used for various citywide capital projects. Projected funding for FY 2027 is from interest earnings, fund balance, and transfers from other funds. The adopting budget ordinance will authorize unspent appropriations from fiscal year 2026 to be re-appropriated to continue previously approved projects. As such, these appropriations are not reflected herein.

Debt Service Fund: This Fund is utilized to account for debt service requirements of the city's general government debt obligations.

Enterprise Fund: This Fund is a self-supporting entity that derives its revenue primarily from charges levied on the users of its services, much like private enterprises. The city utilizes an enterprise fund to account for operations of its solid waste system.

Internal Service Fund: These Funds are used to accumulate and allocate costs internally among the city's various functions. The city utilizes a Risk Management Fund (administering general liability, automotive liability, workers' compensation, etc.) and Medical Insurance Fund (account for activity under the Minimum Premium Plan in accordance with GAAP).

Fiduciary Funds: These Fund types are used to account for resources held for the benefit of parties outside the government and include the OPEB Plan Trust Fund and the OPEB Reimbursement Benefit Fund.

Summary by Fund

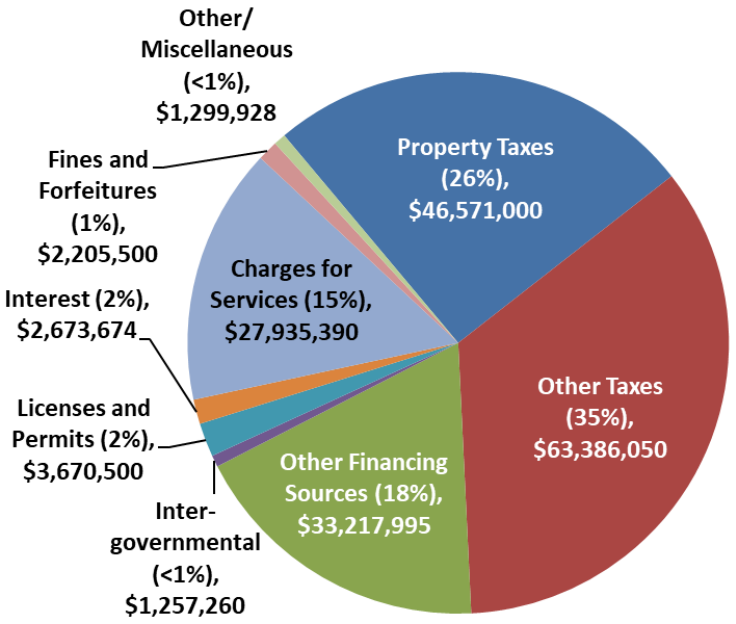
	Revenues*	Expenditures	Surplus/ (Deficit)	Balanced Budget
General Fund	**$ 107,166,499**	**$ 107,166,499**	**$ -**	**√ ****
Special Revenue Funds:				
E911 Fund	5,205,846	5,205,846	-	√
Impact Fee Fund	2,500,000	2,500,000	-	√
Hotel/Motel Fund	10,040,000	10,040,000	-	√
	$ 17,745,846	**$ 17,745,846**	**$ -**	
Capital/Grant Funds:				
Capital Projects Fund	$ 8,636,572	$ 8,636,572	$ -	√
Stormwater Capital Fund	1,500,000	1,500,000	-	√
2022 Parks Bond Fund	450,000	450,000	-	√
TSPLOST 1 Capital Fund	2,239,099	2,239,099	-	√
TSPLOST 2 Capital Fund	17,350,000	17,350,000	-	√
	$ 30,175,671	**$ 30,175,671**	**$ -**	
Debt Service Fund	**$ 6,704,256**	**$ 6,704,256**	**$ -**	**√**
Enterprise Fund:				
Solid Waste Fund	**$ 6,284,164**	**$ 6,284,164**	**$ -**	**√**
Internal Service Funds:				
Risk Management Fund	$ 2,468,500	$ 2,468,500	$ -	√
Medical Insurance Fund	10,550,000	10,550,000	-	√
	$ 13,018,500	**$ 13,018,500**	**$ -**	
Fiduciary Funds:				
OPEB Plan Trust Fund	$ 6,500	$ 6,500	$ -	√
OPEB Retirement Reimbursement Plan Trust Fund	1,115,861	1,115,861	-	√
	$ 1,122,361	**$ 1,122,361**	**$ -**	
Total	**$ 182,217,297**	**$ 182,217,297**	**$ -**	**√**

* Includes Operating Revenues of $136 million along with Non-Operating Revenues of $46 million. Non-Operating Revenues represent sources such as fund balance, inter-fund transfers, inter-fund allocations, etc.

**Includes $1.1 million reduction in the Annual Capital Appropriation (from $1,573,887 in amended FY 2026 to $475,000 in FY 2027).

Summary by Revenue Source

FY 2027 Citywide Budget totals $182 Million



The chart above segments the FY 2027 budget by revenue source and includes the following:

Property Taxes: Ad Valorem tax on real/personal property owned within the city. The recommended millage rate for FY 2027 is flat with the prior year at 5.750 mills and is composed of the following: Operating Millage Rate of 5.050 mills (used to fund general city operations and the recurring capital program); and a Debt Service Millage Rate of 0.700 mills (used to fund debt service on voter approved general obligation bonds).

Other Taxes: Includes local option sales taxes (i.e., LOST), transportation sales taxes (TSPLOST), franchise fees (fees charged to utility companies operating within the city that allow for the use of public right-of-way), hotel/motel taxes, business and occupational taxes, etc.

Licenses and Permits: Includes building permit fees, occupancy permit fees, alcohol beverage permit fees, development permits and related fees, etc.

Intergovernmental: Includes federal, state, and local grant funding as well as revenue sharing associated with intergovernmental agreements.

Charges for Services: Includes recreation user fees, planning and development fees, fire plan review fees, special event fees, impact fees, solid waste fees, employer/employee premium fees; etc.

Fines and Forfeitures: Includes municipal court fines, code enforcement board fines, school zone speed citations, etc.

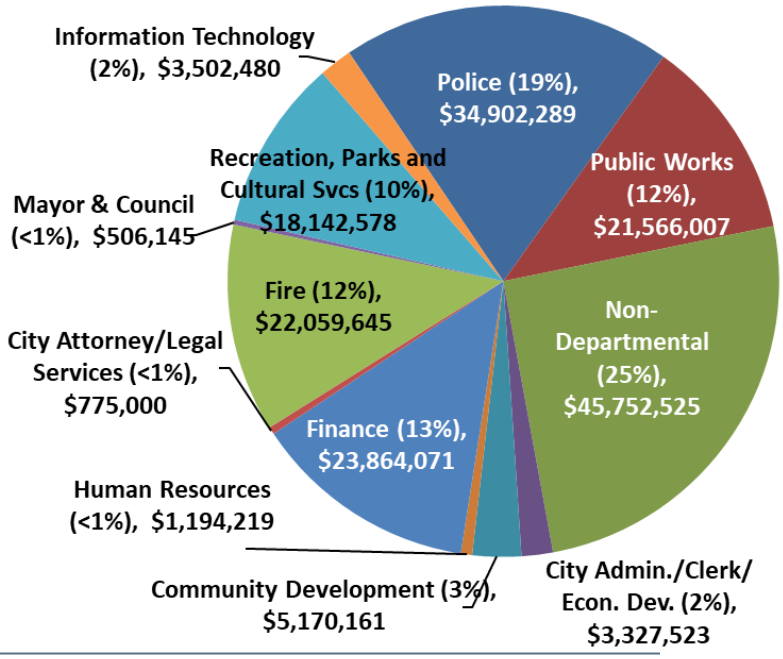
Interest: Includes investment earnings on city funds.

Other/Miscellaneous: Includes the sale of surplus assets, donations, internal funding allocations for OPEB Reimbursement benefits, and other miscellaneous revenues.

Other Financing Sources: Includes inter-fund transfers and budgeted fund balance.

Summary by Department Expenditures

FY 2027 Citywide Budget totals $182 Million



The chart above segments the FY 2027 budget by department/functional unit and includes the following:

Mayor and City Council

City Administration (incl. City Clerk and Economic Dev.)

Community Development

Public Works

Finance (includes general operations and activities associated with the Solid Waste Fund, Risk Management Fund and Medical Insurance Fund)

Human Resources

Information Technology

Legal Services (City Attorney)

Municipal Court

Police (includes general operations and activities associated with the E911 Fund)

Fire

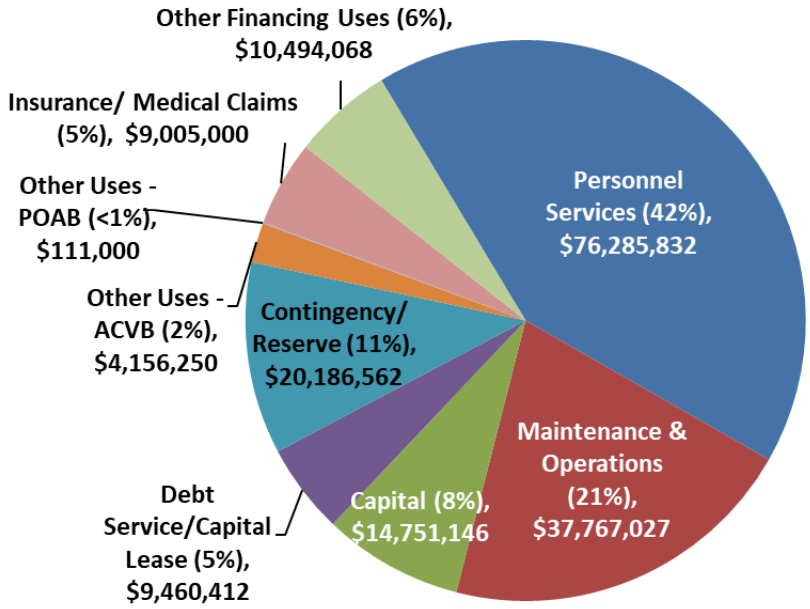
Recreation, Parks & Cultural Services

Non-Departmental (interfund transfers, contingency/reserves, Hotel/Motel Fund distributions, debt service, activities within the OPEB Retirement Reimbursement Plan Trust Fund, etc.)

Please refer to the *Departmental Summaries* section of this document for specific information on each department including mission, goals and objectives, financial summary, and performance measures.

Summary by Expenditure Category

FY 2027 Citywide Budget totals $182 Million



The chart above segments the FY 2027 budget by expenditure category and includes:

Personnel Services: Includes expenses for salaries, wages, and related employee benefits provided for all people employed by the city whether on a full-time, part-time, temporary, or seasonal basis. Employee benefits include employer contribution for health insurance, pension, social security, workers compensation, etc. There is a grossing-up effect with the OPEB Retirement Reimbursement Plan Trust Fund as the benefit-related expenses are also reflected in the Operating Funds (e.g., General Fund, E911 Fund, etc.).

Maintenance and Operations: Includes expenses for goods and services associated with city's provision of services. Examples include professional fees, repair & maintenance, utilities, travel, training, etc.

Capital: Includes expenses for the acquisition of capital assets (e.g., building improvements, machinery and equipment, etc.).

Debt Service: Includes expenses related to the repayment of the city's voter-approved debt obligations, debt service on capital lease obligations, etc.

Insurance/Medical Claims: Includes an actuarially determined estimate for risk-management insurance claims and estimated medical claims under the city's Minimum Premium Plan. There is a grossing-up effect with the Medical Insurance Fund as the employer premium expenses are also reflected in the Operating Funds (e.g., General Fund, E911 Fund, etc.).

Other Uses: Includes Hotel/Motel Tax disbursements to the Alpharetta Convention & Visitors Bureau.

Contingency/Reserves: Includes General Fund contingency appropriations and reserve appropriations across multiple funds (Hotel/Motel Fund, Solid Waste Fund, etc.).

Other Financing Uses: Includes interfund transfers for items such as grant matches, capital improvements, etc.

Consolidated Summary (Revenues by Source/Expenditures by Department)

		Special Revenue Funds			Capital Project Funds			
	General Fund	E911 Fund	Impact Fee Fund	Hotel/Motel Fund	Capital Projects Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund
REVENUES:								
Property Taxes	$ 40,173,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Local Option Sales Taxes/TSPLOST	23,075,000	-	-	-	-	-	-	-
Other Taxes	21,810,200	850	-	9,500,000	-	-	-	-
Licenses and Permits	3,670,500	-	-	-	-	-	-	-
Intergovernmental Revenue	207,260	1,050,000	-	-	-	-	-	-
Charges for Services	5,644,400	3,360,000	-	-	-	-	-	-
Fines and Forfeitures	2,205,500	-	-	-	-	-	-	-
Interest Earnings	900,000	-	-	40,000	400,000	100,000	-	300,000
Other/Miscellaneous	256,567	-	-	-	-	-	-	-
subtotal	$ 97,942,427	$ 4,410,850	$ -	$ 9,540,000	$ 400,000	$ 100,000	$ -	$ 300,000
Other Financing Sources								
Interfund Transfer from General Fund	$ -	$ 794,996	$ -	$ -	$ 4,736,572	$ 1,400,000	$ -	$ -
Interfund Transfer from Hotel/Motel Fund	3,562,500	-	-	-	-	-	-	-
Budgeted Fund Balance	5,661,572	-	2,500,000	500,000	3,500,000	-	450,000	1,939,099
subtotal	$ 9,224,072	$ 794,996	$ 2,500,000	$ 500,000	$ 8,236,572	$ 1,400,000	$ 450,000	$ 1,939,099
Total Revenues	**$ 107,166,499**	**$ 5,205,846**	**$ 2,500,000**	**$ 10,040,000**	**$ 8,636,572**	**$ 1,500,000**	**$ 450,000**	**$ 2,239,099**
EXPENDITURES:								
Mayor and City Council	$ 506,145	$ -	$ -	$ -	$ -	$ -	$ -	$ -
City Administration/City Clerk/Econ. Dev.	3,227,523	-	-	-	100,000	-	-	-
Finance	4,561,407	-	-	-	-	-	-	-
Legal Services	775,000	-	-	-	-	-	-	-
Information Technology	2,934,680	-	-	-	567,800	-	-	-
Human Resources	1,194,219	-	-	-	-	-	-	-
Municipal Court	1,454,654	-	-	-	-	-	-	-
Police	28,140,194	5,205,846	-	-	1,556,249	-	-	-
Fire	22,059,645	-	-	-	-	-	-	-
Public Works	12,184,410	-	-	-	2,750,000	1,500,000	-	-
Recreation, Parks and Cultural Services	15,280,078	-	1,169,000	-	1,243,500	-	450,000	-
Community Development	5,170,161	-	-	-	-	-	-	-
Non-Allocated (Reserve)	-	-	-	-	-	-	-	-
Non-Departmental	-	-	-	5,500	-	-	-	-
Insurance Premiums (Risk Fund)	1,206,500	-	-	-	-	-	-	-
Alpharetta Convention and Visitors Bureau	-	-	-	4,156,250	-	-	-	-
POAB Remittance (SB 285)	111,000	-	-	-	-	-	-	-
Bond Debt Service (Principal and Interest)*	289,315	-	-	1,476,713	-	-	-	-
Contingency	1,000,000	-	-	-	-	-	-	-
Non-Allocated (Reserve)	140,000	-	1,331,000	839,037	2,419,023	-	-	2,239,099
subtotal	$ 100,234,931	$ 5,205,846	$ 2,500,000	$ 6,477,500	$ 8,636,572	$ 1,500,000	$ 450,000	$ 2,239,099
Other Financing Uses								
Interfund Transfer to General Fund	$ -	$ -	$ -	$ 3,562,500	$ -	$ -	$ -	$ -
Interfund Transfer to 911 Fund	794,996	-	-	-	-	-	-	-
Interfund Transfer to Capital Funds	6,136,572	-	-	-	-	-	-	-
subtotal	$ 6,931,568	$ -	$ -	$ 3,562,500	$ -	$ -	$ -	$ -
Total Expenditures	**$ 107,166,499**	**$ 5,205,846**	**$ 2,500,000**	**$ 10,040,000**	**$ 8,636,572**	**$ 1,500,000**	**$ 450,000**	**$ 2,239,099**

** Not including Capital Lease debt service which is programmed into the appropriate Departmental budget above (Police and Fire).*

	Capital Project Fund		Enterprise Fund	Internal Service Funds		Fiduciary Funds		
	TSPLOST 2 Capital Fund	Debt Service Fund	Solid Waste Fund	Risk Management Fund	Medical Insurance Fund	OPEB Plan Trust Fund	OPEB Reimb. Fund	TOTAL
REVENUES:								
Property Taxes	$ -	$ 6,398,000	$ -	$ -	$ -	$ -	$ -	$ 46,571,000
Local Option Sales Taxes/TSPLOST	9,000,000	-	-	-	-	-	-	32,075,000
Other Taxes	-	-	-	-	-	-	-	31,311,050
Licenses and Permits	-	-	-	-	-	-	-	3,670,500
Intergovernmental Revenue	-	-	-	-	-	-	-	1,257,260
Charges for Services	-	-	6,263,000	2,117,990	10,550,000	-	-	27,935,390
Fines and Forfeitures	-	-	-	-	-	-	-	2,205,500
Interest Earnings	750,000	33,000	21,164	50,510	-	6,500	72,500	2,673,674
Other/Miscellaneous	-	-	-	-	-	-	1,043,361	1,299,928
subtotal	$ 9,750,000	$ 6,431,000	$ 6,284,164	$ 2,168,500	$ 10,550,000	$ 6,500	$ 1,115,861	$ 148,999,302
Other Financing Sources								
Interfund Transfer from General Fund	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 6,931,568
Interfund Transfer from Hotel/Motel Fund	-	-	-	-	-	-	-	3,562,500
Budgeted Fund Balance	7,600,000	273,256	-	300,000	-	-	-	22,723,927
subtotal	$ 7,600,000	$ 273,256	$ -	$ 300,000	$ -	$ -	$ -	$ 33,217,995
Total Revenues	**$ 17,350,000**	**$ 6,704,256**	**$ 6,284,164**	**$ 2,468,500**	**$ 10,550,000**	**$ 6,500**	**$ 1,115,861**	**$ 182,217,297**
EXPENDITURES:								
Mayor and City Council	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 506,145
City Administration/City Clerk/Econ. Dev.	-	-	-	-	-	-	-	3,327,523
Finance	-	-	6,284,164	2,468,500	10,550,000	-	-	23,864,071
Legal Services	-	-	-	-	-	-	-	775,000
Information Technology	-	-	-	-	-	-	-	3,502,480
Human Resources	-	-	-	-	-	-	-	1,194,219
Municipal Court	-	-	-	-	-	-	-	1,454,654
Police	-	-	-	-	-	-	-	34,902,289
Fire	-	-	-	-	-	-	-	22,059,645
Public Works	5,131,597	-	-	-	-	-	-	21,566,007
Recreation, Parks and Cultural Services	-	-	-	-	-	-	-	18,142,578
Community Development	-	-	-	-	-	-	-	5,170,161
Non-Allocated (Reserve)	-	-	-	-	-	-	-	-
Non-Departmental	-	11,000	-	-	-	6,500	1,115,861	1,138,861
Insurance Premiums (Risk Fund)	-	-	-	-	-	-	-	1,206,500
Alpharetta Convention and Visitors Bureau	-	-	-	-	-	-	-	4,156,250
POAB Remittance (SB 285)	-	-	-	-	-	-	-	111,000
Bond Debt Service (Principal and Interest)*	-	6,693,256	-	-	-	-	-	8,459,284
Contingency	-	-	-	-	-	-	-	1,000,000
Non-Allocated (Reserve)	12,218,403	-	-	-	-	-	-	19,186,562
subtotal	$ 17,350,000	$ 6,704,256	$ 6,284,164	$ 2,468,500	$ 10,550,000	$ 6,500	$ 1,115,861	$ 171,723,229
Other Financing Uses								
Interfund Transfer to General Fund	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 3,562,500
Interfund Transfer to 911 Fund	-	-	-	-	-	-	-	794,996
Interfund Transfer to Capital Funds	-	-	-	-	-	-	-	6,136,572
subtotal	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 10,494,068
Total Expenditures	**$ 17,350,000**	**$ 6,704,256**	**$ 6,284,164**	**$ 2,468,500**	**$ 10,550,000**	**$ 6,500**	**$ 1,115,861**	**$ 182,217,297**

** Not including Capital Lease debt service which is programmed into the appropriate Departmental budget above (Police and Fire).*

Consolidated Summary (Revenues by Source/Expenditures by Category)

		Special Revenue Funds			Capital Project Funds			
	General Fund	E911 Fund	Impact Fee Fund	Hotel/Motel Fund	Capital Project Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund
REVENUES:								
Property Taxes	$ 40,173,000	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Local Option Sales Taxes/TSPLOST	23,075,000	-	-	-	-	-	-	-
Other Taxes	21,810,200	850	-	9,500,000	-	-	-	-
Licenses and Permits	3,670,500	-	-	-	-	-	-	-
Intergovernmental Revenue	207,260	1,050,000	-	-	-	-	-	-
Charges for Services	5,644,400	3,360,000	-	-	-	-	-	-
Fines and Forfeitures	2,205,500	-	-	-	-	-	-	-
Interest Earnings	900,000	-	-	40,000	400,000	100,000	-	300,000
Other/Miscellaneous	256,567	-	-	-	-	-	-	-
subtotal	$ 97,942,427	$ 4,410,850	$ -	$ 9,540,000	$ 400,000	$ 100,000	$ -	$ 300,000
Other Financing Sources								
Interfund Transfer from General Fund	$ -	$ 794,996	$ -	$ -	$ 4,736,572	$ 1,400,000	$ -	$ -
Interfund Transfer from Hotel/Motel Fund	3,562,500	-	-	-	-	-	-	-
Budgeted Fund Balance	5,661,572	-	2,500,000	500,000	3,500,000	-	450,000	1,939,099
subtotal	$ 9,224,072	$ 794,996	$ 2,500,000	$ 500,000	$ 8,236,572	$ 1,400,000	$ 450,000	$ 1,939,099
Total Revenues	**$ 107,166,499**	**$ 5,205,846**	**$ 2,500,000**	**$ 10,040,000**	**$ 8,636,572**	**$ 1,500,000**	**$ 450,000**	**$ 2,239,099**
EXPENDITURES:								
Personnel Services	$ 70,820,565	$ 4,320,847	$ -	$ -	$ -	$ -	$ -	$ -
Maintenance and Operations	26,589,923	884,999	-	5,500	-	-	-	-
Capital	283,000	-	1,169,000	-	6,217,549	1,500,000	450,000	-
Debt Service (Capital Lease/Other)	1,001,128	-	-	-	-	-	-	-
Debt Service (Bond)	289,315	-	-	1,476,713	-	-	-	-
Other								
Insurance/Medical Claims	-	-	-	-	-	-	-	-
Alpharetta Convention and Visitors Bureau	-	-	-	4,156,250	-	-	-	-
POAB Remittance (SB 285)	111,000	-	-	-	-	-	-	-
Contingency	1,000,000	-	-	-	-	-	-	-
Non-Allocated (Reserve)	140,000	-	1,331,000	839,037	2,419,023	-	-	2,239,099
subtotal	$ 100,234,931	$ 5,205,846	$ 2,500,000	$ 6,477,500	$ 8,636,572	$ 1,500,000	$ 450,000	$ 2,239,099
Other Financing Uses								
Interfund Transfer to General Fund	$ -	$ -	$ -	$ 3,562,500	$ -	$ -	$ -	$ -
Interfund Transfer to 911 Fund	794,996	-	-	-	-	-	-	-
Interfund Transfer to Capital Funds	6,136,572	-	-	-	-	-	-	-
subtotal	$ 6,931,568	$ -	$ -	$ 3,562,500	$ -	$ -	$ -	$ -
Total Expenditures	**$ 107,166,499**	**$ 5,205,846**	**$ 2,500,000**	**$ 10,040,000**	**$ 8,636,572**	**$ 1,500,000**	**$ 450,000**	**$ 2,239,099**

	Capital Project Fund		Enterprise Fund	Internal Service Funds		Fiduciary Funds		
	TSPLOST 2 Capital Fund	Debt Service Fund	Solid Waste Fund	Risk Management Fund	Medical Insurance Fund	OPEB Plan Trust Fund	OPEB Reimb. Fund	**TOTAL**
REVENUES:								
Property Taxes	$ -	$ 6,398,000	$ -	$ -	$ -	$ -	$ -	$ 46,571,000
Local Option Sales Taxes/TSPLOST	9,000,000	-	-	-	-	-	-	32,075,000
Other Taxes	-	-	-	-	-	-	-	31,311,050
Licenses and Permits	-	-	-	-	-	-	-	3,670,500
Intergovernmental Revenue	-	-	-	-	-	-	-	1,257,260
Charges for Services	-	-	6,263,000	2,117,990	10,550,000	-	-	27,935,390
Fines and Forfeitures	-	-	-	-	-	-	-	2,205,500
Interest Earnings	750,000	33,000	21,164	50,510	-	6,500	72,500	2,673,674
Other/Miscellaneous	-	-	-	-	-	-	1,043,361	1,299,928
subtotal	$ 9,750,000	$ 6,431,000	$ 6,284,164	$ 2,168,500	$ 10,550,000	$ 6,500	$ 1,115,861	$ 148,999,302
Other Financing Sources								
Interfund Transfer from General Fund	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 6,931,568
Interfund Transfer from Hotel/Motel Fund	-	-	-	-	-	-	-	3,562,500
Budgeted Fund Balance	7,600,000	273,256	-	300,000	-	-	-	22,723,927
subtotal	$ 7,600,000	$ 273,256	$ -	$ 300,000	$ -	$ -	$ -	$ 33,217,995
Total Revenues	**$ 17,350,000**	**$ 6,704,256**	**$ 6,284,164**	**$ 2,468,500**	**$ 10,550,000**	**$ 6,500**	**$ 1,115,861**	**$ 182,217,297**
EXPENDITURES:								
Personnel Services	$ -	$ -	$ 101,059	$ -	$ -	$ -	$ 1,043,361	$ 76,285,832
Maintenance and Operations	-	11,000	6,183,105	1,613,500	2,400,000	6,500	72,500	37,767,027
Capital	5,131,597	-	-	-	-	-	-	14,751,146
Debt Service (Capital Lease/Other)	-	-	-	-	-	-	-	1,001,128
Debt Service (Bond)	-	6,693,256	-	-	-	-	-	8,459,284
Other								
Insurance/Medical Claims	-	-	-	855,000	8,150,000	-	-	9,005,000
Alpharetta Convention and Visitors Bureau	-	-	-	-	-	-	-	4,156,250
POAB Remittance (SB 285)	-	-	-	-	-	-	-	111,000
Contingency	-	-	-	-	-	-	-	1,000,000
Non-Allocated (Reserve)	12,218,403	-	-	-	-	-	-	19,186,562
subtotal	$ 17,350,000	$ 6,704,256	$ 6,284,164	$ 2,468,500	$ 10,550,000	$ 6,500	$ 1,115,861	$ 171,723,229
Other Financing Uses								
Interfund Transfer to General Fund	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 3,562,500
Interfund Transfer to 911 Fund	-	-	-	-	-	-	-	794,996
Interfund Transfer to Capital Funds	-	-	-	-	-	-	-	6,136,572
subtotal	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 10,494,068
Total Expenditures	**$ 17,350,000**	**$ 6,704,256**	**$ 6,284,164**	**$ 2,468,500**	**$ 10,550,000**	**$ 6,500**	**$ 1,115,861**	**$ 182,217,297**

Personnel Listing by Department

	Actual FY 2023	Actual FY 2024	Actual FY 2025	Actual FY 2026	Recommended FY 2027	Variance
Detail by Department:						
General Fund						
Mayor & City Council	7.0	7.0	7.0	7.0	7.0	-
City Administration, City Clerk, Economic Development	6.0	9.0	11.0	10.0	10.0	-
Finance	21.5	21.5	21.5	20.5	20.5	-
* Fire	106.0	107.0	107.0	109.0	110.0	1.0
Information Technology	13.0	13.0	13.0	13.0	14.0	1.0
Human Resources	4.0	4.0	5.0	5.0	5.0	-
Municipal Court	6.5	6.5	7.5	7.5	7.5	-
* Police	132.5	136.5	136.5	136.5	133.5	(3.0)
** Alpharetta Jail	-	-	-	15.0	15.0	-
Public Works	51.0	50.0	50.0	50.0	50.0	-
Recreation, Parks & Cultural Services	49.0	49.5	49.5	49.5	49.5	-
Community Development	32.0	33.0	31.0	31.0	31.0	-
subtotal	***428.5***	***437.0***	***439.0***	***454.0***	***453.0***	**(1.0)**
E-911 Fund (Special Revenue Fund)						
911 Operations (Police)	32.0	32.0	32.0	32.0	32.0	-
Information Technology	1.0	1.0	1.0	1.0	1.0	-
subtotal	***33.0***	***33.0***	***33.0***	***33.0***	***33.0***	**-**
Solid Waste Fund (Enterprise Fund)						
Finance	1.0	1.0	1.0	1.0	1.0	-
Full-Time Equivalent (FTE) Positions	***462.5***	***471.0***	***473.0***	***488.0***	***487.0***	***(1.0)***

Notes:

* FY 2026 includes the reorganization of the Public Safety Department into the component units (Police and Fire Departments). For purposes of clarity, the personnel counts for previous periods have been separated from the single Public Safety Department into the separate Police and Fire Departments. The net personnel effect of this reorganization is the reduction of one full-time position. An additional position was transferred from the Police Department to the IT Department to better reflect operational support needs.

** FY 2026 personnel counts include the addition of 15 positions that occurred subsequent to the budget adoption and reflect staffing for the reopening of the Alpharetta Jail (previously staffed by the Fulton County Sherriff).

General Fund Summary

Overview

The *General Fund Summary* section is intended to provide readers with an overall understanding of the city's fiscal year 2027 General Fund budget. The following schedules provide readers with revenue and expenditure summaries/narratives from several different perspectives including:

- **General Fund Summary**

  This section provides a brief description of the General Fund as well as charts segmenting revenues by source (e.g., Property Taxes, Licenses & Permits, etc.) and expenditures by department (e.g., City Administration, Public Safety, etc.).

- **Statement of Budgetary Comparisons**

  This statement provides a detailed comparison of revenues and expenditures for fiscal years 2026 and 2027. Revenues are presented by source, and expenditures are presented by category (i.e., Personnel Services, Maintenance & Operations, Capital, etc.).

- **Statement of Revenues, Expenditures, and changes in Fund Balance**

  This statement provides a historical comparison of revenues and expenditures for fiscal years 2023-2026. Also included are changes in fund balance. The financial forecast utilizes revenue collection patterns (historical and current patterns as adjusted for seasonal fluctuations), expenditure trends and mandates, etc.

- **Budget Narrative**

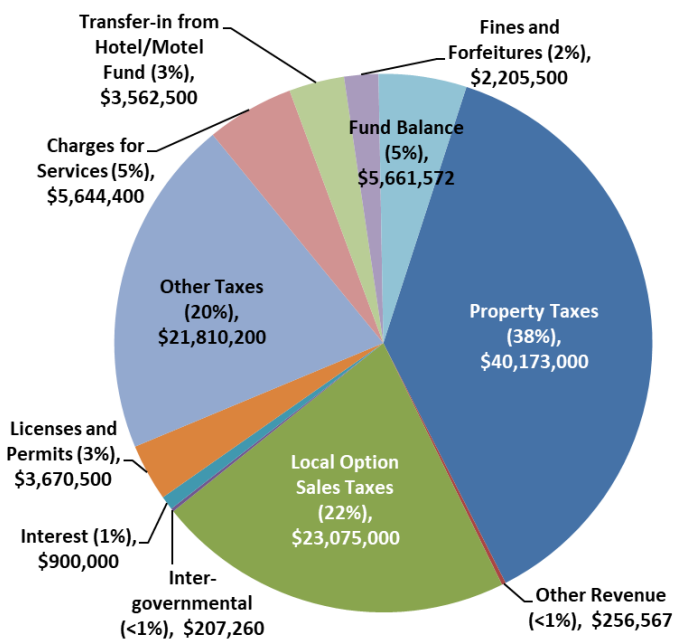
  This section provides a narrative of General Fund revenue and expenditure trends including historical information.

GENERAL FUND SUMMARY

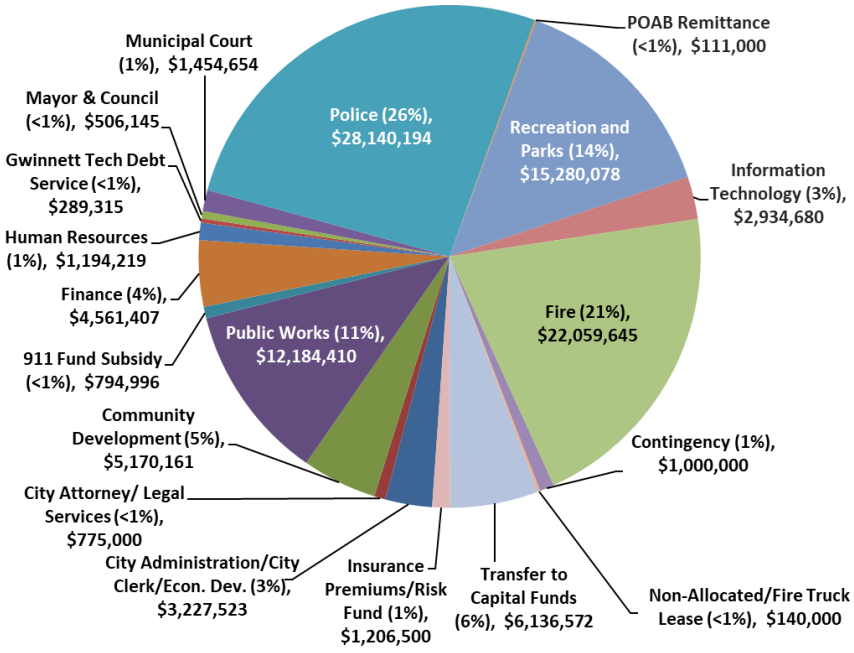
The General Fund is the city's largest fund and includes governmental activities such as police, fire, recreation, and other general governmental functions that are primarily funded with property taxes, utility taxes, franchise fees, state shared revenues, and charges for services, such as recreation program fees.

FY 2027 General Fund Budget totals $107 Million

Summary by Revenue Source



Summary by Department Expenditures



GENERAL FUND SUMMARY

Statement of Budgetary Comparisons

	FY 2026 AMENDED BUDGET	FY 2027 RECOMMENDED BUDGET	$ Variance	% Variance
Revenues:				
Property Taxes:	$ 38,079,000	$ 40,173,000	$ 2,094,000	5.5%
Local Option Sales Tax	22,440,500	23,075,000	634,500	2.8%
Other Taxes	20,784,639	21,810,200	1,025,561	4.9%
Licenses & Permits	3,476,500	3,670,500	194,000	5.6%
Intergovernmental	352,385	207,260	(145,125)	-41.2%
Charges for Services	5,437,932	5,644,400	206,468	3.8%
Fines & Forfeitures	2,280,000	2,205,500	(74,500)	-3.3%
Interest	1,150,000	900,000	(250,000)	-21.7%
Other Revenues	265,334	256,567	(8,767)	-3.3%
Other Financing Sources:				
Interfund Transfer (Hotel/Motel Fund)	3,412,500	3,562,500	150,000	4.4%
Interfund Transfer (Dev. Authority Fund)	53,448	-	(53,448)	-100.0%
Total Operating Revenues	**$ 97,732,238**	**$ 101,504,927**	**$ 3,772,689**	**3.9%**
Fund Balance Carryforw ard	5,017,048	5,661,572		
Total Revenues	**$ 102,749,286**	**$ 107,166,499**		
Expenditures (by Category):				
Personnel Services:				
Salaries/Overtime/Seasonal	$ 42,447,724	$ 44,844,827	$ 2,397,103	5.6%
Group Insurance	10,417,576	11,496,353	1,078,777	10.4%
Pension (Defined Benefit)	3,782,091	4,029,754	247,663	6.5%
Pension (401A)	4,413,146	4,919,345	506,199	11.5%
OPEB Health Reimbursement Benefit	937,999	981,584	43,585	4.6%
Miscellaneous Benefits	4,281,593	4,548,702	267,109	6.2%
subtotal	$ 66,280,129	$ 70,820,565	$ 4,540,436	6.9%
Maintenance and Operations:				
Professional Services	$ 3,984,796	$ 4,004,658	$ 19,862	0.5%
Runoff Election (Fulton County IGA est.)	150,000	-	(150,000)	-100.0%
Repair/Maintenance	2,555,400	2,589,750	34,350	1.3%
Maintenance Contracts	4,769,450	4,927,484	158,034	3.3%
Professional Services (IT)	5,484,289	5,218,752	(265,537)	-4.8%
General Supplies	1,298,974	1,335,666	36,692	2.8%
Utilities	3,437,875	3,657,675	219,800	6.4%
Fuel	680,000	696,500	16,500	2.4%
Uniforms	540,101	507,400	(32,701)	-6.1%
Travel/Training	630,638	669,363	38,725	6.1%
Legal Services	800,000	775,000	(25,000)	-3.1%
Insurance Premiums (Risk Fund)	1,060,500	1,206,500	146,000	13.8%
Miscellaneous	1,097,331	1,001,175	(96,156)	-8.8%
subtotal	$ 26,489,354	$ 26,589,923	$ 100,569	0.4%
Capital/Lease:	$ 1,324,295	$ 1,284,128	$ (40,167)	-3.0%
	$ 1,324,295	$ 1,284,128	$ (40,167)	-3.0%
Other Uses:				
Contingency	$ 1,190,815	$ 1,000,000	$ (190,815)	-16.0%
Gw innett Tech Contribution (Debt Svc)	291,065	289,315	(1,750)	-0.6%
Remittance to POAB (SB 285)	-	111,000	111,000	-
subtotal	$ 1,481,880	$ 1,400,315	$ (192,565)	-5.5%
Total Operating Expenditures	**$ 95,575,658**	**$ 100,094,931**	**$ 4,519,273**	**4.7%**
Reserve for Capital Lease (Fire Apparatus)		140,000		
Interfund Transfers:				
Fund Balance (Capital Investment)	5,017,048	5,661,572		
Capital Program	1,517,405	475,000		
Solid Waste Fund	75,000	-		
911 Fund (subsidy)	564,175	794,996		
Total Expenditures	**$ 102,749,286**	**$ 107,166,499**		

GENERAL FUND SUMMARY

Statement of Revenues, Expenditures, and changes in Fund Balance

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$ 42,887,619	$ 42,565,605	$ 37,984,828	$ 37,984,828	$ 32,967,780
Revenues:					
Property Taxes	$ 31,815,004	$ 35,011,561	$ 37,228,120	$ 38,079,000	$ 40,173,000
Local Option Sales Taxes	21,516,647	22,003,613	22,333,319	22,440,500	23,075,000
Other Taxes	17,716,007	18,084,484	18,863,437	20,784,639	21,810,200
Licenses and Permits	3,750,861	3,157,721	4,119,458	3,476,500	3,670,500
Intergovernmental	186,554	157,509	194,513	352,385	207,260
Charges for Services	4,475,005	4,726,871	5,416,710	5,437,932	5,644,400
Fines and Forfeitures	3,294,775	2,521,315	2,444,798	2,280,000	2,205,500
Interest	1,119,677	1,798,420	1,931,792	1,150,000	900,000
Other Revenue	222,867	225,113	411,046	215,334	196,567
	$ 84,097,398	$ 87,686,607	$ 92,943,191	$ 94,216,290	$ 97,882,427
Expenditures:					
Mayor and City Council	$ 325,804	$ 330,619	$ 339,277	$ 443,701	$ 506,145
* City Admin./City Clerk/Economic Dev.	1,431,114	1,962,226	2,398,858	3,268,654	3,227,523
Finance	3,644,561	3,884,976	4,008,239	4,240,525	4,561,407
Legal Services	789,935	636,323	719,057	800,000	775,000
Information Technology	2,078,939	2,441,958	2,355,024	2,636,061	2,934,680
Human Resources	765,239	898,324	992,950	1,110,544	1,194,219
Municipal Court	1,114,535	1,140,547	1,264,685	1,410,650	1,454,654
** Police *(incl. Fire in FY 2025 and prior)*	35,338,050	38,510,158	42,214,823	27,595,621	28,140,194
** Fire	-	-	-	20,242,597	22,059,645
Public Works	9,455,806	10,157,660	10,778,721	11,483,060	12,184,410
Recreation, Parks & Cultural Services	11,925,670	13,424,187	14,565,991	14,917,082	15,280,078
* Community Development	4,305,559	4,668,399	4,458,793	4,884,783	5,170,161
Non-Departmental:					
Contingency	19,916	9,062	33,750	1,190,815	1,000,000
(1) Insurance Premiums (Risk Fund)	823,300	928,885	966,800	1,060,500	1,206,500
Gwinnett Tech Debt Service	288,640	287,490	286,978	291,065	289,315
POAB Remittance	-	-	-	-	111,000
Reserve (Lease; Fire Apparatus)	-	-	-	-	140,000
	$ 72,307,068	$ 79,280,814	$ 85,383,946	$ 95,575,658	$ 100,234,931
Other Financing Sources (Uses):					
Proceeds from the sale of Capital Assets	$ 46,548	$ 53,300	$ 114,549	$ 50,000	$ 60,000
Interfund Transfer:					
Hotel/Motel Fund	3,480,902	3,418,049	3,477,779	3,412,500	3,562,500
Development Authority Fund	-	-	-	53,448	-
Capital Project Fund	(11,439,800)	(12,392,818)	(11,843,416)	(4,634,453)	(4,736,572)
Stormwater Capital Fund	(4,200,000)	(3,950,000)	(1,604,364)	(1,900,000)	(1,400,000)
Asset Forfeiture Fund	-	(9,432)	-	-	-
TAD2 Fund	-	(105,670)	-	-	-
E911 Fund	-	-	-	(564,175)	(794,996)
Solid Waste Fund	-	-	-	(75,000)	-
	$ (12,112,350)	$ (12,986,571)	$ (9,855,452)	$ (3,657,680)	$ (3,309,068)
Rounding (ACFR Reconciliation)	6	1	(3)	-	-
Ending Fund Balance: (2)	**$ 42,565,605**	**$ 37,984,828**	**$ 35,688,619**	**$ 32,967,780**	**$ 27,306,208**
Changes in Fund Balance (actual/est.)	*$ (322,014)*	*$ (4,580,777)*	*$ (2,296,209)*	*$ (5,017,048)*	*$ (5,661,572)*
Personnel (full-time-equivalent)	*428.5*	*437.0*	*439.0*	*454.0*	*453.0*

Notes:

(1) Represents funding to the Risk Management Fund.

(2) Pursuant to the City's financial management policies, fund balance in excess of the City's current 25% Fund Balance Reserve can be used for one-time capital initiatives.

* Economic Development function was reorganized from Community Development Department to City Administration starting in FY 2025.

** The Public Safety Department (Police and Fire Services) was reorganized into separate Police and Fire Departments starting with FY 2026. The financial activity for Police represents police and fire service costs through FY 2025, with Police only service costs thereafter.

Budget Narrative

The City's budget for FY 2027 reflects a tightening fiscal reality characterized by a widening gap between revenue growth and operational mandates. While revenues are projected to grow at basic inflationary levels, these gains are outpaced by the accelerating costs of personnel and customer service delivery (e.g. contractual services, software infrastructure, etc.). In response, this budget emphasizes prudent fiscal management, strategic resource allocation, and a commitment to maintaining core services while ensuring long-term financial sustainability.

Revenues

FY 2027 General Fund operating revenues are forecasted to grow by 3.9%, or $3.8 million, compared to Amended FY 2026.

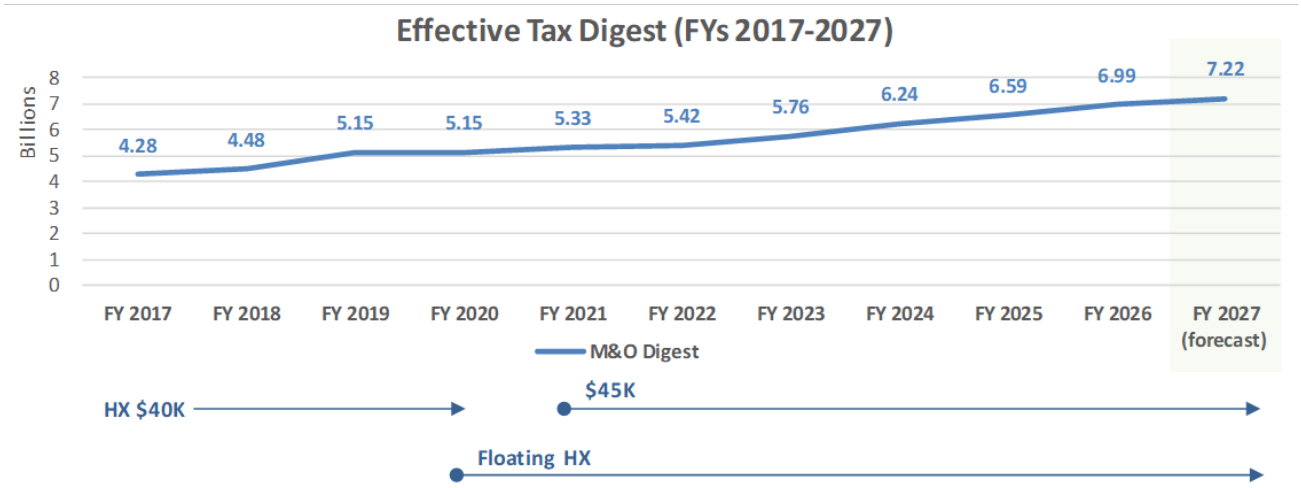
The following table compares major revenue categories within the General Fund:

Revenues:	FY 2026 AMENDED BUDGET	FY 2027 RECOMMENDED BUDGET	$ Variance	% Variance
Property Taxes:				
Current Year	$ 34,075,000	$ 35,720,000	$ 1,645,000	4.8%
Motor Vehicle Title Tax Fee	3,625,000	4,075,000	450,000	12.4%
Prior Year/Delinquent/MV	379,000	378,000	(1,000)	-0.3%
Local Option Sales Tax	22,440,500	23,075,000	634,500	2.8%
Other Taxes:				
Franchise Fees	7,130,000	7,675,000	545,000	7.6%
Insurance Premium Tax	7,159,239	7,400,000	240,761	3.4%
Alcohol Beverage Excise Tax	2,825,000	2,900,000	75,000	2.7%
Other Taxes	3,670,400	3,835,200	164,800	4.5%
Licenses & Permits	3,476,500	3,670,500	194,000	5.6%
Intergovernmental	352,385	207,260	(145,125)	-41.2%
Charges for Services	5,437,932	5,644,400	206,468	3.8%
Fines & Forfeitures	2,280,000	2,205,500	(74,500)	-3.3%
Interest	1,150,000	900,000	(250,000)	-21.7%
Other Revenues	265,334	256,567	(8,767)	-3.3%
Other Financing Sources:				
Interfund Transfer (Hotel/Motel Fund)	3,412,500	3,562,500	150,000	4.4%
Interfund Transfer (Dev. Authority Fund)	53,448	-	(53,448)	-100.0%
Total Operating Revenues	**$ 97,732,238**	**$ 101,504,927**	**$ 3,772,689**	**3.9%**
Fund Balance Carryforward	5,017,048	5,661,572		
Total Revenues	**$ 102,749,286**	**$ 107,166,499**		

Property Taxes

Property taxes are calculated based on an assessed millage rate on real and personal property owned within the city. Real property consists of land, buildings, structures, and improvements affixed to land. Personal property includes machinery, equipment, inventory supplies, furniture, motor vehicles, boats, etc. The Fulton County Board of Assessors (the "BOA") determines the fair market value of property (i.e., tax digest) utilizing numerous analytical methods including comparative sales data. As of the date of this budget submission, the BOA has not provided the updated tax digest.

The chart below illustrates the tax digest growth within the city for the last 9 years based on actual tax collections coupled with a staff estimate/forecast for FYs 2026 and 2027. These figures are net of all exemptions (e.g., basic homestead and floating homestead exemptions) and reflect the valuations that account for current year property tax collections.



The property valuation figures detailed above reflect multiple homeowner tax reduction measures including:

- FY 2020: Implementation of the floating homestead exemption.
- FY 2021: $5,000 increase to the basic homestead exemption ($40,000 to $45,000).
- FY 2021: Removal of income restrictions for residents aged 65 and older to qualify for the $10,000 senior homestead exemption.
- General tax digest appeal valuation adjustments.

The city's homestead exemptions are estimated to save our homeowners over $11 million annually.

The tax digest is subject to tax appeal adjustments which reduce overall valuations. As such, staff forecasts a FY 2026 tax digest (calendar/taxroll year 2025) that adjusts for

actual/estimated valuation reductions (e.g., tax appeals) which results in a revised valuation approximating $6.99 billion.

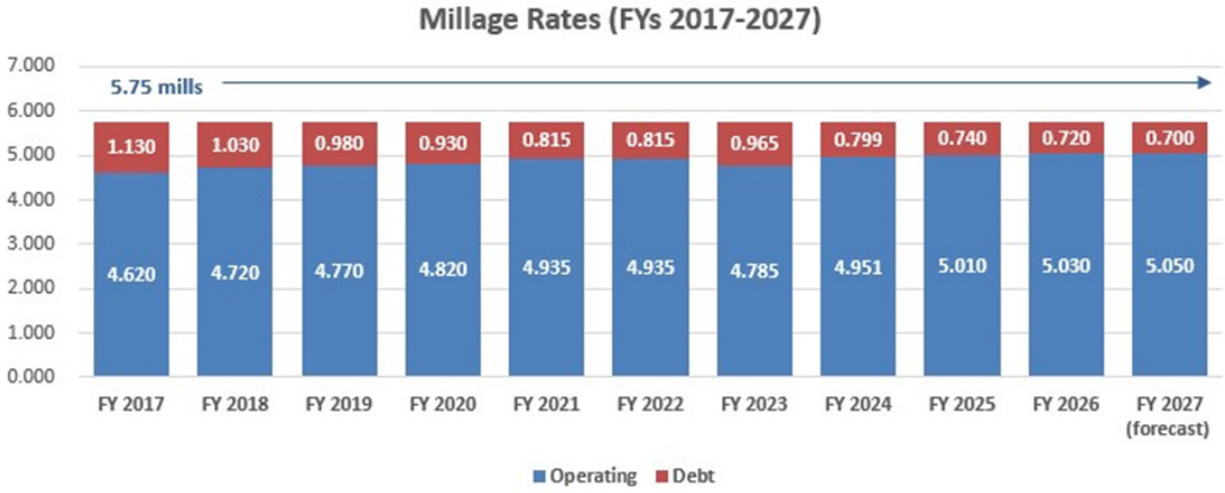
The forecast for FY 2027 builds upon the FY 2026 estimate with the following growth factors coupled with a collection rate of 98% which approximates the historical average:

- 6% valuation growth trend for the Residential portion of the digest (market segment is experiencing strong growth but valuations growth is tempered through the floating homestead exemption which limits growth to the lesser of 3% or CPI). By way of recent comparisons, the FYs 2026 and 2025 tax digest growth for residential properties approximated 9% and 10% respectively.
- -2% valuation reduction trend for the Commercial portion of the digest which highlights the uncertainty facing our commercial office developments resulting from the COVID-19 pandemic and its impact on occupancy rates. By way of recent comparisons, the FYs 2026 and 2025 tax digest change for commercial properties approximated -2% and 2% respectively.
- $70 million in new construction taxable-value-added. By way of recent comparisons, the FYs 2026 and 2025 tax digest growth for new construction taxable-value-added totaled $133 million and $137 million respectively.

The net result is forecasted growth in the FY 2027 tax digest of 3% over 2026 estimates.

In conjunction with the annual budget process, the city adopts a millage rate to be applied to the tax digest in order to determine the taxroll value and, consequently, the property tax billings.

The city has historically acknowledged the need to provide a taxation rate commensurate with the government's level of service. The chart below illustrates the annual millage rates levied by the city for the last 10 years including the request for FY 2027.

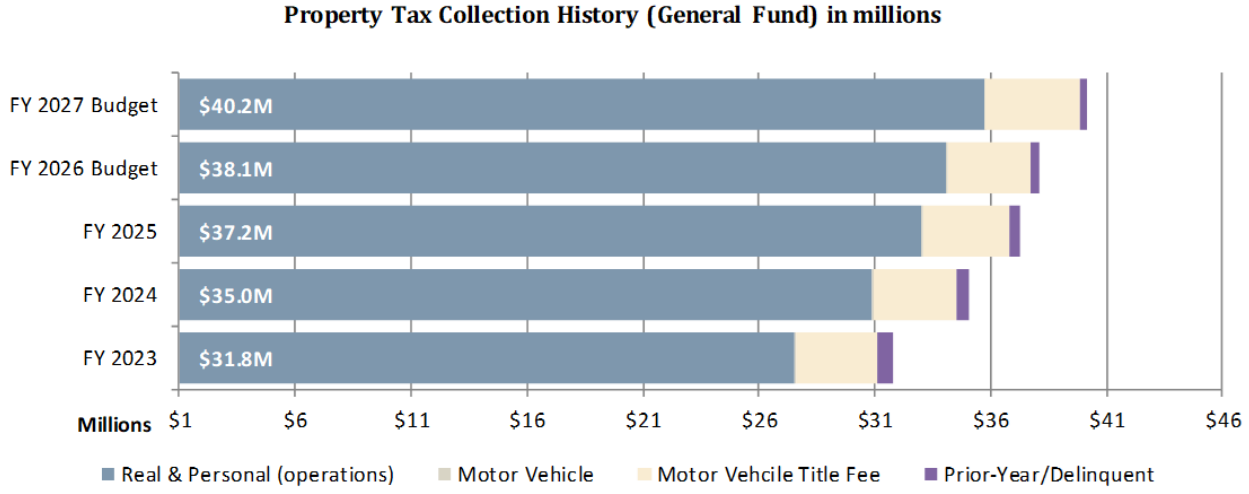


GENERAL FUND SUMMARY

The FY 2027 Budget is based on maintenance of the city's millage rate at 5.750 mills.

- The portion of the millage rate funding debt service (Debt Service Fund) is estimated to decrease 0.020mills compared to FY 2026 to a total of 0.700 mills. As our annual debt service obligations are relatively flat, growth in the tax digest allows for a reduction in the debt service millage rate. The decrease in tax revenue associated with the debt service millage shift is estimated at -$180,000.
- The portion of the millage rate funding operations and capital investment (General Fund) is estimated to increase 0.020 mills compared to FY 2026 to a total of 5.050 mills. The increase in tax revenue associated with the operations millage shift is estimated at +$145,000 and has been allocated towards operating initiatives and capital funding. The shift from debt service millage to operations millage results in additional tax savings for our homeowners as the operations millage rate is subject to homestead exemptions.

General Fund property taxes are budgeted at $40.2 million in FY 2027 and represent approximately 38% of General Fund revenues. The chart below depicts a 5-year history of General Fund property tax collections by type.



The property tax revenue estimates are net of the city's homestead exemptions which are estimated to save our homeowners over $11 million annually (not including the one-time HTRG credit discussed in the following section). The main homestead components include the floating homestead exemption that caps the valuation growth of homesteaded properties at the lesser of 3% or CPI and the basic homestead exemption that lowers the taxable value of a homesteaded property by $45,000. The city's homestead exemptions go great lengths in keeping Alpharetta an affordable place to live and retire.

The City's homestead exemptions, coupled with the one-time HTRG credit (see below) will **save our homeowners over $12.3 million** in FY 2027.

Taxpayer Savings – State HTRG Program (one-time)

On March 3, 2026, House Bill 973 was signed into law and is reflected in the State of Georgia's Amended Fiscal Year 2026 budget. One component of this bill includes an initiative by Governor Brian Kemp to refund $850 million in property taxes back to homesteaded property owners in 2026. Specifically, HB 973 authorizes the HTRG Program (Homeowner Tax Relief Grant) which provides onetime tax relief to homesteaded property owners by reducing the assessed value of their property by up to $18,000.

The City will add the HTRG exemption to its current homestead exemption offerings, which are among the highest in the State, resulting in additional savings estimated at $1.3 million for our homeowners. The City will work with the GA Department of Revenue and claim reimbursement for the value of HTRG Program. The City's property tax revenue will not be affected under this program.

Motor Vehicle Taxes

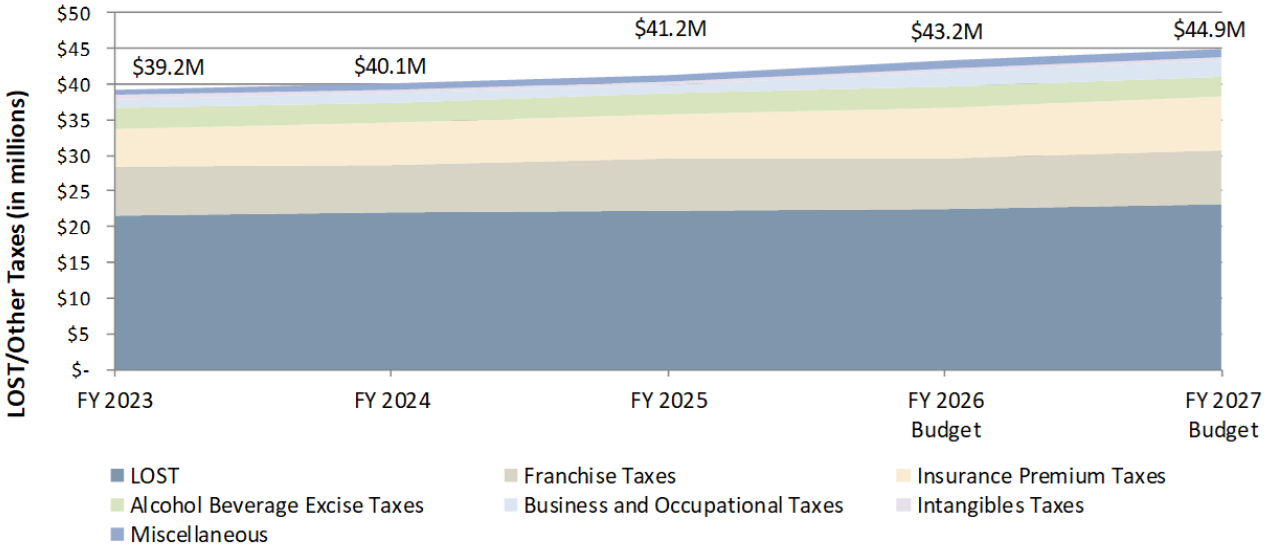
Motor vehicle tax is experiencing declines due to House Bill 386 which phased out motor vehicle taxes on all vehicles titled on or after March 1, 2013. The city is still receiving motor vehicle taxes on vehicles titled before March 1, 2013, until the vehicle is sold/transferred. Accordingly, the city is forecasting motor vehicle revenues to decline moving forward.

HB 386 created a Motor Vehicle Title Fee to partially offset the reduction in motor vehicle taxes. The Title Fee is 7%[11] and is shared between the State and local governments (county, city, and school boards; local share approaches 65% of collections). An increase of 12% is forecasted in FY 2027 for motor vehicle title fees from a budget-to-budget standpoint. Collection trends during fiscal year 2026 indicate revenue collections approximating $3.9 million resulting in a revised growth trend of 4.5%.

[11] OCGA 48-5C-1.

Other Taxes (including LOST)

Other taxes account for 42%, or $44.9 million, of total General Fund revenue for FY 2027. Specifically, revenue sources within the Other Taxes category include Local Option Sales Taxes ("LOST"), Franchise Taxes, Insurance Premium Taxes, Alcohol Beverage Excise Taxes, etc. The chart below provides a 5-year history of Other Tax collections by type.



- **Local Option Sales Taxes ("LOST"):** This revenue source represents the city's portion of the 7.75% sales and use tax collected in Fulton County and totals $23.1 million for FY 2027. The 7.75% sales tax is made up of the following: State 4% and Local 3.75%. The Local portion is made up of 1% MARTA, 1% ESPLOST (education), 1% LOST, and 0.75% TSPLOST (Alpharetta portion of TSPLOST is collected in a separate Fund as these proceeds can only be used on approved transportation projects). Alpharetta's share of the 1% LOST for 2026 (calendar year) is 5.6232%.

  Sales and use tax is collected by the retailer making sales of tangible personal property in Fulton County. LOST is reported and remitted to the Georgia Department of revenue each month for the previous month's sales. The DOR calculates the distribution and remits the revenue to the city monthly.

  The LOST is distributed to municipalities within Fulton County based on population. The rate of distribution is negotiated every 10-years after the decennial U.S. Census. The rate of distribution for the 10-year period of 2023-2032 has been adopted by Fulton County and all municipalities within the borders. Inherent in this agreement is a relative growth in the distribution retained by Fulton County which starts at 5% in 2023 (increase from 2022 distribution level of 4.9794%) and levels off at 12.5% by 2030. Due to the distribution change for the County, Alpharetta's proportionate

distribution, despite relative population growth, starts at 5.8164% in 2023 (decrease from 2022 distribution level of 5.8367%) and levels off at 5.4034% by 2030.

An increase of 3% is forecasted for FY 2027 from a budget-to-budget standpoint. However, actual collections are estimated at $22.7 million in FY 2026 which equates to a revised growth rate of 1.7%. Growth in LOST collections has cooled over the last several years and is forecasted to continue the minor growth trend through FY 2027 (fiscal year-over-year growth trends: FY 2022 = 21%; FY 2023 = 5%; FY 2024 = 2%; FY 2025 = 1.5%; 1st 7 months of FY 2026 = 2%).

- **Franchise Taxes:** Several of the larger franchise agreements include the following: Georgia Power (electric/4% of taxable gross sales); Comcast (cable and communications/5% of gross receipts); BellSouth (communications/3% of gross receipts); etc.

  An increase of 8% is forecasted for FY 2027 from a budget-to-budget standpoint. However, actual collections are estimated at $7.8 million in FY 2026 which equates to a revised rate of -1% which reflects the volatility of this revenue source.

  Collections from GA Power and Sawnee EMC, the largest contributors of this revenue source (81% of total franchise fees), are forecasted at $6.2 million for FY 2027 and represent a minimal decline compared to the prior year ($6.3 million was collected in FY 2026). Recent history has shown a volatility in collections which is, at least partially, dependent upon weather (e.g. cooler summer months reduce demand for air conditioning) and business activity (e.g. lower occupancy rates among office buildings reduces energy demand). Additionally, GA Power base rates are frozen through 2028, but rate payers are still subject to adjustments in fuel costs, storm recovery costs, etc. As such, forecasts for this revenue source tend to be conservative to adjust for the volatility.

  Collections from gas franchise agreements (Southern Company Gas) are estimated to total $736,412 in FY 2026. The budget forecast for FY 2027 totals $775,000 and reflects growth approximating 14% compared to the FY 2026 Budget ($680,000) and 5% compared to the FY 2026 revenue estimate.

  Collections from cable franchise agreements are estimated to total $500,000 in FY 2026. The budget forecast for FY 2027 is flat at $500,000. This revenue source has been declining annually since FY 2020 which represented the 1st full fiscal year after the City raised the Cable Franchise Fee from 3% to 5% (effective January 1, 2019). Reasons proffered for this decline include competition from streaming services and the evolving ways consumers access these services.

  Collections from telecom franchise agreements (Bellsouth primarily) are estimated to total $225,000 in FY 2026. The budget forecast for FY 2027 totals $175,000 is flat

compared to the FY 2026 budget ($175,000) and reflects declines approximating -22% compared to the FY 2026 revenue estimate ($225,000). This revenue source experienced material reductions between 2021-current due to an audit of Franchise Fee remittances based on multiple factors including revisions related to classification of customers as "exempt" under the fee parameters. Due to the volatility of these collections, a conservative revenue forecast model is being employed.

- **Insurance Premium Taxes:** This revenue source represents a percentage of insurers' gross direct premiums on life, accident, and sickness insurance policies written within the State and totals $7.4 million in FY 2027 which equates to an increase of 3% over FY 2026 collections ($7.2 million). Insurance premium tax is due on the first day of the calendar year and is collected directly by the city.

  Senate Bill 285, passed during the 2026 legislative session, requires local governments to remit 1.5% of Insurance Premium Tax collections to the POAB (Peace Officers' Annuity & Benefit Fund of Georgia). This new funding mandate amounts to $111,000 for FY 2027 and is discussed herein (Expenditure section of this General Fund Summary).

- **Alcohol Beverage Excise Taxes:** This revenue source represents taxes levied on dealers and wholesalers of alcoholic beverages within the city and totals $2.9 million in FY 2027. A decrease of -3% is forecasted for FY 2027 from a budget-to-budget standpoint. Actual collections are estimated at $2.9 million in FY 2026 which equates to a revised growth rate of 1%.

- **Business and Occupational Taxes:** This revenue source represents the levy, assessment, and collection of an annual occupational tax on certain businesses and practitioners of professions and occupations located or exerting substantial efforts in the city and totals $2.2 million in FY 2027. An increase of 2% is forecasted for FY 2027 from a budget-to-budget standpoint.

Licenses & Permits

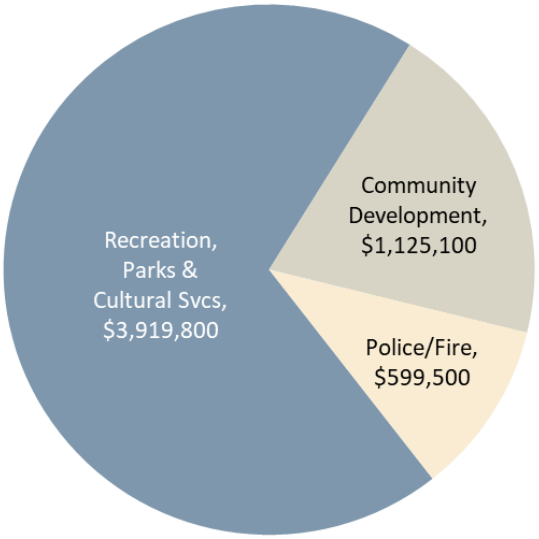
Licenses & permits account for 3%, or $3.7 million, of total General Fund revenue for FY 2027. Licenses and permit revenues include alcoholic beverage permit fees, development permit and related fees, building permit fees, occupancy permit fees, sign permit fees, etc.

An increase of 6% is forecasted for FY 2027 from a budget-to-budget standpoint. However, actual collections are estimated at $4.2 million in FY 2026 which equates to a revised rate of -13%. As discussed below, this revenue source is largely dependent upon the economy and real estate markets (commercial, housing etc.) and tends to exhibit volatility which leads to a conservative approach to forecasting revenues (forecast will often lag current collection activity).

The largest revenue source is Building Permit Fees ($2 million forecasted for FY 2027; $2.6 million estimated for FY 2026). As building permit fee revenues are non-standard, and their activity is highly dependent upon multiple economic factors (local, regional, and national) which are notoriously difficult to forecast, staff forecast these sources in a conservative manner. For example, collections for December 2025 were 119% higher than December 2024 while collections for January 2026 were -32% lower than January 2025.

Charges for Services

Charges for services include user fees for community development (plan review, planning and development fees, etc.), public safety (plan review, police reports and services, etc.), recreation and parks (program and activity fees, etc.), and special events.



Charges for services account for 5%, or $5.6 million, of total General Fund revenue. An increase of 4% is forecasted for FY 2027 from a budget-to-budget standpoint. However, actual collections are estimated at $6 million in FY 2026 which equates to a reduction of -6%.

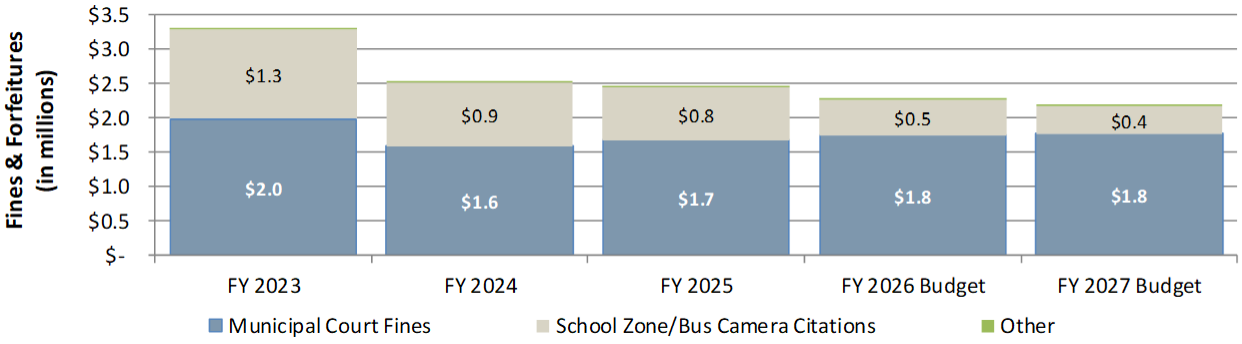
One of the more volatile components of Charge for Services is Plan Review Fees which, just as noted within the Licenses & Permits section, is largely dependent upon the economy and real estate markets (commercial, housing etc.) and tends to exhibit volatility which leads to a conservative approach to forecasting revenues (forecast will often lag current collection activity). By way of example, Plan Review Fees totaled $1.1 million in FY 2023, $768,000 in FY 2024, $1.1 million in FY 2025, $1.4 million is estimated in FY 2026, and the FY 2027 budget totals a more conservative $925,000.

Intergovernmental

Intergovernmental sources account for <1%, or $207,260, of total General Fund revenue for FY 2027. This revenue is primarily generated from Intergovernmental Agreements with the City of Milton related to the sharing of court management capabilities as well as overtime reimbursement through the Federal/State HIDTA (High Intensity Drug Trafficking Area) program. Please note, the FY 2026 Budget includes an estimate ($140,000) for year-2 software maintenance fees for Hexagon (public safety software) from the City of Milton. However, the implementation is still ongoing and currently is targeting a fall 2026 go-live. As such, the year-2 software maintenance fees for Hexagon will not be needed until FY 2028. This pass-through transaction (revenues equal expenditures) has been removed from the FY 2027 Budget and will be programmed in FY 2028.

Fines & Forfeitures

Fines & Forfeitures include municipal court fines, code enforcement, school zone citations, etc.



Fines & forfeitures account for 2%, or $2.2 million, of total General Fund revenue for FY 2027. A decrease of -3% is forecasted for FY 2027 from a budget-to-budget standpoint. However, actual collections are estimated at $2.2 million in FY 2026 which is flat (no growth) and reflects offsetting factors including growth in Court Fine revenue which is fully offset through continued declines in the school zone citation revenue source as enforcement changes driving behavior.

Interest

Interest earnings account for 1%, or $900,000, of total General Fund revenue for FY 2027. Investment earnings are being forecast conservatively due to volatility in interest rates and there is a high likelihood that this revenue source will outperform budget estimates in FY 2027.

Transfer-In from Hotel/Motel Fund (Other Financing Sources)

Other Financing Sources account for 3%, or $3.6 million, of total General Fund revenue for FY 2027 and consist of the city's share (40%) of the Hotel/Motel Tax. This revenue source is discussed in more detail within the *Special Revenue Fund Summaries* (Hotel/Motel Fund) section of this document.

Fund Balance

Carryforward fund balance accounts for 5%, or $5.7 million, of total General Fund appropriations for FY 2027. Carryforward Fund Balance represents available cash in excess of the city's 25% emergency reserve. It is the city's policy to utilize the remaining fund balance above the emergency requirement for one-time expenditures.

Expenditures

The City's budget for FY 2027 reflects a tightening fiscal reality characterized by a widening gap between revenue growth and operational mandates. While revenues are projected to grow at basic inflationary levels, these gains are outpaced by the accelerating costs of personnel and customer service delivery (e.g. contractual services, software infrastructure, etc.). In response, this budget emphasizes prudent fiscal management, strategic resource allocation, and a commitment to maintaining core services while ensuring long-term financial sustainability.

Operating expenditures of the General Fund are forecasted to grow by 4.7% over FY 2026. However, included in this figure is the annual impact of Jail operations as FY 2026 reflected 8 months of operations while FY 2027 represents the 1st full year of operations ($749,190 in cost growth for FY 2027) as well as Senate Bill 285 (adopted in 2026) which requires local governments to remit 1.5% of Insurance Premium Tax collections to the POAB (Peace Officers' Annuity & Benefit Fund of Georgia). After adjusting for the items noted above, the base operational growth totals 3.9%. The following table compares departmental appropriations within the General Fund:

Expenditures (by Department):	FY 2026 AMENDED BUDGET	FY 2027 RECOMMENDED BUDGET	$ Variance	%Variance
Mayor and Council	$ 443,701	$ 506,145	$ 62,444	14.1%
City Admin/City Clerk/Economic Dev.	3,118,654	3,227,523	108,869	3.5%
Runoff Election (Fulton County IGA est.)	150,000	-	(150,000)	-100.0%
Finance	4,205,525	4,488,382	282,857	6.7%
Wellness Program	35,000	73,025	38,025	108.6%
Legal Services	800,000	775,000	(25,000)	-3.1%
Information Technology	2,636,061	2,934,680	298,619	11.3%
Human Resources	1,110,544	1,194,219	83,675	7.5%
Municipal Court	1,410,650	1,454,654	44,004	3.1%
Police	25,877,540	25,672,923	(204,617)	-0.8%
Jail Operations	1,718,081	2,467,271	749,190	43.6%
Fire	20,242,597	22,059,645	1,817,048	9.0%
Public Works	9,303,060	9,894,410	591,350	6.4%
Utilities (Electricity)	2,180,000	2,290,000	110,000	5.0%
Recreation, Parks & Cultural Services	14,917,082	15,280,078	362,996	2.4%
Community Development	4,884,783	5,170,161	285,378	5.8%
Non-Departmental:				
Contingency	1,190,815	1,000,000	(190,815)	-16.0%
Insurance Premiums (Risk Fund)	1,060,500	1,206,500	146,000	13.8%
Gwinnett Tech Contribution (Debt Svc)	291,065	289,315	(1,750)	-0.6%
Remittance to POAB (SB 285)	-	111,000	111,000	-
Total Operating Expenditures	**$ 95,575,658**	**$ 100,094,931**	**$ 4,519,273**	**4.7%**
Reserve for Capital Lease (Fire Apparatus)		140,000		
Interfund Transfers:				
Fund Balance (Capital Investment)	5,017,048	5,661,572		
Capital Program	1,517,405	475,000		
Solid Waste Fund	75,000	-		
911 Fund (subsidy)	564,175	794,996		
Total Expenditures	**$ 102,749,286**	**$ 107,166,499**		

GENERAL FUND SUMMARY

The following table compares expenditure category appropriations within the General Fund:

	FY 2026 AMENDED BUDGET	FY 2027 RECOMMENDED BUDGET	$ Variance	% Variance
Expenditures (by Category):				
Personnel Services:				
Regular Salaries (incl. Holiday Leave)	$ 37,378,084	$ 38,774,327	$ 1,396,243	3.7%
Jail Operations	756,108	1,082,000	325,892	43.1%
Overtime, Seasonal, etc.	4,271,482	4,838,500	567,018	13.3%
Jail Operations	42,050	150,000	107,950	256.7%
Group Insurance	10,165,785	11,107,209	941,424	9.3%
Jail Operations	251,791	389,144	137,353	54.6%
Pension (Defined Benefit)	3,782,091	3,990,902	208,811	5.5%
Jail Operations	-	38,852	38,852	-
Pension (401A)	4,293,422	4,749,647	456,225	10.6%
Jail Operations	119,724	169,698	49,974	41.7%
OPEB Health Reimbursement Benefit	918,045	954,767	36,722	4.0%
Jail Operations	19,954	26,817	6,863	34.4%
Miscellaneous Benefits	4,216,334	4,424,877	208,543	4.9%
Jail Operations	65,259	123,825	58,566	89.7%
subtotal	$ 66,280,129	$ 70,820,565	$ 4,540,436	6.9%
Maintenance and Operations:				
Professional Services	$ 3,984,796	$ 4,004,658	$ 19,862	0.5%
Runoff Election (Fulton County IGA est.)	150,000	-	(150,000)	-
Repair/Maintenance	2,555,400	2,589,750	34,350	1.3%
Maintenance Contracts	4,769,450	4,927,484	158,034	3.3%
Professional Services (IT)	5,484,289	5,218,752	(265,537)	-4.8%
General Supplies	1,298,974	1,335,666	36,692	2.8%
Utilities	3,437,875	3,657,675	219,800	6.4%
Fuel	680,000	696,500	16,500	2.4%
Uniforms	540,101	507,400	(32,701)	-6.1%
Travel/Training	630,638	669,363	38,725	6.1%
Legal Services	800,000	775,000	(25,000)	-3.1%
Insurance Premiums (Risk Fund)	1,060,500	1,206,500	146,000	13.8%
Miscellaneous	1,097,331	1,001,175	(96,156)	-8.8%
subtotal	$ 26,489,354	$ 26,589,923	$ 100,569	0.4%
Capital/Lease:				
Operational Capital/Other	$ 319,179	$ 293,000	$ (26,179)	-8.2%
Capital Leases	1,005,116	991,128	(13,988)	-1.4%
subtotal	$ 1,324,295	$ 1,284,128	$ (40,167)	-3.0%
Other Uses:				
Contingency	$ 1,190,815	$ 1,000,000	$ (190,815)	-16.0%
Gwinnett Tech Contribution (Debt Svc)	291,065	289,315	(1,750)	-0.6%
Remittance to POAB (SB 285)	-	111,000	111,000	-
subtotal	$ 1,481,880	$ 1,400,315	$ (81,565)	-5.5%
Total Operating Expenditures	**$ 95,575,658**	**$ 100,094,931**	**$ 4,519,273**	**4.7%**
Reserve for Capital Lease (Fire Apparatus)		140,000		
Interfund Transfers:				
Fund Balance (Capital Investment)	5,017,048	5,661,572		
Capital Program	1,517,405	475,000		
Solid Waste Fund	75,000	-		
911 Fund (subsidy)	564,175	794,996		
Total Expenditures	**$ 102,749,286**	**$ 107,166,499**		

Meeting the Internal Needs of Operating Departments

Several of the major points of the FY 2027 Budget are as follows:

- Management of personnel and compensation program to align with current market environment which includes budgetary adjustments to cover significant inflation in labor costs which are necessary to retain and recruit our highly skilled workforce:
  - Staffing level of 487 full-time equivalents "FTE" (citywide). No change in the overall staffing level is requested for FY 2027.
  - Staff compensation adjustments aimed at maintaining competitiveness in an inflationary labor market include:
    - Proposed compensation adjustments:
      - ✓ July 1, 2026: Continuation of the annual performance-based compensation program (3% on average) in a total estimated cost of $1.8 million coupled with targeted market-based compensation adjustments (2% to 3% on average in an estimated cost of $640,000). These figures are included within departmental operating budgets.
    - Recent compensation adjustments:
      - ✓ July 1, 2025: Continuation of the annual performance-based compensation program (3% on average) in a total estimated cost of $1.6 million coupled with targeted market-based compensation adjustments.
      - ✓ July 1, 2024: Continuation of the annual performance-based compensation program (4% on average) in a total estimated cost of $2.2 million.
      - ✓ July 1, 2024 (Operating Initiative): Market-based personnel compensation adjustments scheduled for July 1, 2024, in a total estimated cost of $913,800 (targeted to specific positions but representing average costs equivalent to 2% of payroll citywide).
      - ✓ July 1, 2023: Continuation of the annual performance-based compensation program (4% on average) in a total estimated cost of $1.8 million.
      - ✓ July 1, 2023: This initiative represents a continuation of the City's salary adjustment process aimed at maintaining competitiveness within the market and is estimated at $1.73 million.

- Minimal growth (<1% or $100,569) in departmental maintenance and operations budgets (General Fund). However, included in this figure is one-time funding in FY 2026 for election costs ($150,000 for potential runoff election costs, which were not incurred). After adjusting for FY 2026 election funding, the base operational growth totals 1%. Specific cost drivers include:
  - Decrease in professional services of -$130,138 (-3% reduction) due primarily to FY 2026 funding for runoff election costs that are not needed in FY 2027 (as discussed above; FY 2027 is not an election year).
  - Increase in maintenance contract costs of $158,034 (3% growth) due primarily to the following:
    - Public Works: increase in maintenance contract costs of $103,692 (7% growth) due primarily to anticipated landscape (ROW) maintenance cost growth (current contract expires in January 2027, new projects such as Webb Bridge Road streetscape come online in sections, etc.), growth in funding for the North Fulton Regional Radio System Authority, etc.
    - Recreation, Parks & Cultural Services: Increase in maintenance contract cost growth of $59,793 (3%) due primarily to additional funding for shavings/manure removal (Equestrian Center), parks landscape maintenance, janitorial services, etc.
  - Decrease in IT professional services costs of -$265,537 due primarily to the following:
    - Partial reduction in estimated software maintenance fees for Hexagon (the FY 2026 Budget included year-2 software maintenance fees; however, with the revised go-live estimate for Fall 2026, year-2 software maintenance fees will not be needed until FY 2028). This action results in a funding reduction of -$372,940 in FY 2027 (includes removal of $136,569 in Milton pass-through funding and $232,940 in Alpharetta hexagon software funding). This maintenance funding will be reprogrammed into the FY 2028 Budget.
    - Offsetting the reduction noted above is general growth in citywide technology infrastructure costs including Microsoft Enterprise licensing cost growth of $89,090 (this includes Copilot AI costs of $40,500) as well as specific department enterprise financial management software costs including Tyler Munis ($15,330 growth) and revenue management software (occupational business licenses, hotel taxes, etc.) for Finance,

CityWorks for Public Works, Community Development, and Recreation, Parks, and Cultural Services ($21,423 growth).

- Increase in utility expenses of $219,800 (6% growth) for electricity, natural gas, water/sewer, and miscellaneous utilities (e.g., cable and garbage). The main driver is electric utility cost growth and is based on usage trends. GA Power base rates are frozen through 2028, but rate payers are still subject to adjustments in fuel costs, storm recovery costs, etc. Streetlight additions through City projects (e.g. Webb Bridge Road streetscape, etc.) will also drive cost growth. Lastly, FY 2027 includes the addition of $60,000 in electric utility expenses associated with the Tesla Superchargers. Conservatively, we are estimating service fee revenue in an amount totaling $100,000. FY 2027 will be our 1st full year of operations, and the FY 2028 budget will reflect a more accurate operational picture of the Supercharger financial impact as we will have actual usage trends to guide our budgeting forecasts.
- Increase in travel/training of $38,725 due to a citywide professional development focus aimed at equipping staff with the skills, knowledge, and adaptability needed to deliver efficient, compliant, and high-quality services to the community.
- Increase in insurance premium funding of $146,000 (14% growth) to the Risk Management Fund to cover the increasing costs of liability insurance premiums.
- All other departmental maintenance and operations accounts declined -$66,315, or -1%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

- Other Uses include Contingency (1% of Operational Expenditure Appropriations), Debt Service on the Gwinnett Technical College Campus contribution, and the initial year funding impact associated with Senate Bill 285 passed during the 2026 legislative session that requires local governments to remit 1.5% of Insurance Premium Tax collections[12] to the POAB (Peace Officers' Annuity & Benefit Fund of Georgia).
- Funding from the General Fund, which is available for immediate capital investment in 2027, includes the following:

$ 5,661,572	Fund Balance for one-time capital.
475,000	Capital Contribution from the General Fund.
$ 6,136,572	

[12] FY 2027 budget forecast of Insurance Premium Tax collections totals $7.4 million with the 1.5% contribution to the POAB totaling $111,000.

General Fund Departmental Summaries

Overview

The *Department Summaries* section intends to provide detailed financial and non-financial information about the departmental operations funded within the General Fund.

This section segments departmental budgets into the following components:

- *Mission Statement* – the statement must identify the particular purpose for the department and how it relates to the city's overall mission.
- *Goals & Objectives* – a listing of the fundamental goals and objectives which aid the department in achieving its mission. Goals stretch and challenge the department, but they must also be SMART (Specific, Measurable, Achievable, Relevant, and Timed).

  Direct linkages are identified between the city's vision/strategic priorities and departmental goals & objectives.
- *Revenue/Expenditure Summary* – the budget for the department summarized by expenditure category:
  - Personal Services: salaries, overtime, and other compensation-related expenditures.
  - Maintenance & Operations: professional fees, repair & maintenance, general supplies, communications, and other operational related expenditures.
  - Capital: departmental machinery & equipment expenses.
  - Operating Initiatives: The funding requests herein do not include the new initiatives set forth within the *Operating Initiative Requests* section of this document as those appropriations will not be disbursed into departmental budgets until authorized by the City Council.
- *Statement of Service and Performance Measures* – multi-year summary of departmental performance measurements.

Mayor and City Council

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JIM GILVIN
MAYOR



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Mission Statement

TO MAKE A POSITIVE DIFFERENCE in the community by efficiently managing public resources and providing effective services and leadership that exceed the expectations of our citizens.

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DAN MERKEL
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Mayor and City Council

Mission Statement

To make a positive difference in the community by efficiently managing public resources and providing effective services and leadership that exceed the expectations of our citizens.

Core Values

Excellence: We believe that expectations are the starting point; not the destination. Every member of the City of Alpharetta Team shall be dedicated to the pursuit of continuous improvement in our results and how they are achieved.

Stewardship: The citizens of Alpharetta have entrusted to us public resources and empowered us to protect, invest, and leverage them for the good and betterment of the community. We shall do so in a manner that reflects the highest ethics, exacting standards, and unwavering principles.

Integrity: The trust of the public is the foundation of our ability to conduct the business of local government and realize the City's mission. Every member of the City of Alpharetta Team shall maintain her or his reputation for honesty, straightforwardness, fair dealing, and a sincere desire to serve in the best interest of the community and citizens of Alpharetta.

Service: The City of Alpharetta is committed to efficient, effective, and responsive service delivery that makes a positive difference in the community and the lives of those we serve. We shall proactively address issues and pursue opportunities, act with humility, and deliver more than is expected.

Loyalty: Through every word and action, we shall serve, protect, and promote the community and citizens of Alpharetta; advance the City's mission; and support and work in unity with those with whom we serve.

Community Vision

Our Community Vision is to advance Alpharetta as a signature City by:



Offering the highest quality of environment for our residents and businesses.



Fostering strong sense of community including safety and security.



Providing a business climate that attracts the top echelon companies.

Statement of Revenues and Expenditures

Mayor and City Council
General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
EXPENDITURES					
Personnel Services:					
Salaries	$ 120,000	$ 120,000	$ 120,000	$ 160,000	$ 200,000
Group Insurance	143,131	142,881	141,225	158,708	168,801
FICA	6,763	7,215	7,258	12,527	15,590
Pension (401A Cont./Match)	14,500	16,188	17,250	24,000	30,000
Workers Compensation	3,153	2,724	2,520	2,724	4,340
OPEB Contribution	2,520	3,000	3,000	4,000	5,000
Miscellaneous	3,755	3,600	3,600	3,755	3,793
subtotal	*$ 293,822*	*$ 295,607*	*$ 294,853*	*$ 365,714*	*$ 427,524*
Maintenance & Operations:					
* Mayor	$ 6,909	$ 9,200	$ 8,489	$ 9,200	$ 8,000
* City Council Post 1	183	2,127	8,000	8,000	6,000
* City Council Post 2	242	20	109	8,000	6,000
* City Council Post 3	568	3,133	1,455	8,000	6,000
* City Council Post 4	2,748	1,103	4,030	8,000	6,000
* City Council Post 5	271	2,334	1,595	8,000	6,000
* City Council Post 6	1,013	1,766	3,401	8,000	6,000
Miscellaneous	20,047	15,329	17,345	20,787	34,621
subtotal	*$ 31,982*	*$ 35,011*	*$ 44,424*	*$ 77,987*	*$ 78,621*
Capital	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
TOTAL	**$ 325,804**	**$ 330,619**	**$ 339,277**	**$ 443,701**	**$ 506,145**

** Financial activity is tied to the Post and not the necessarily the current incumbent.*

Budget Narrative

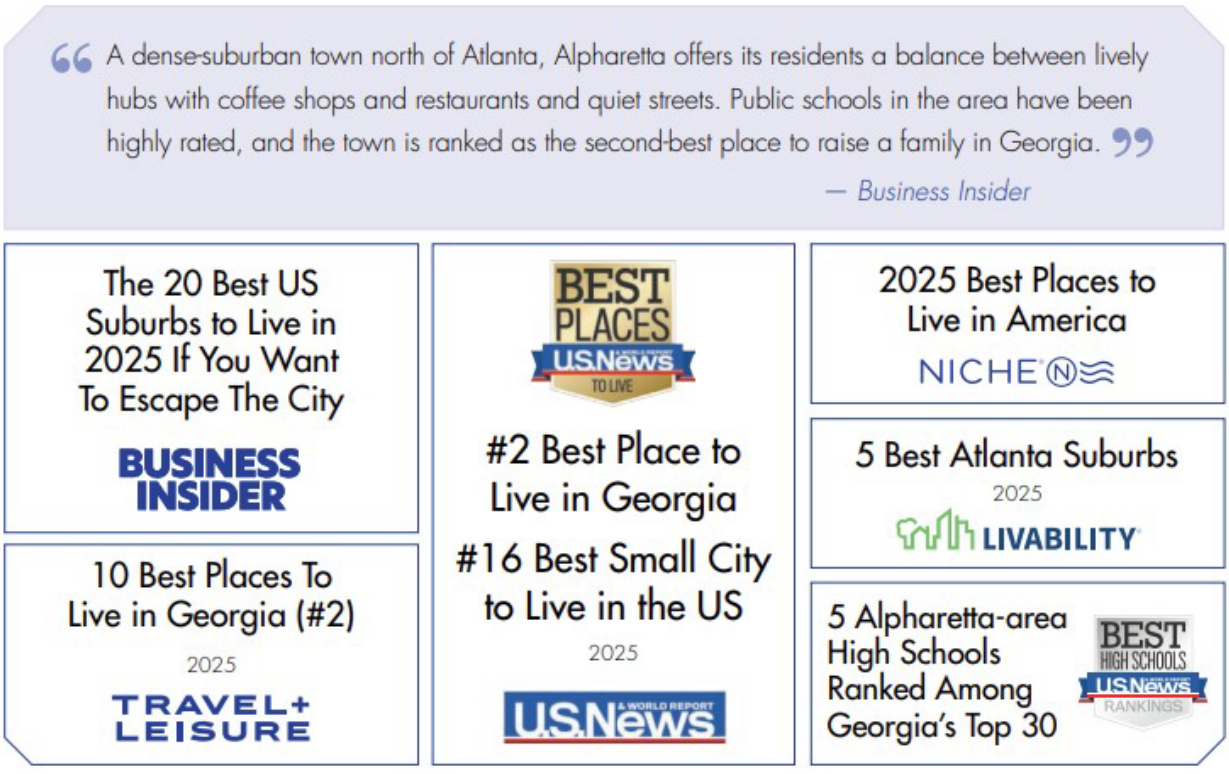
The Fiscal Year 2027 Budget for the Mayor and City Council totals $506,145 and represents an increase of 14%, or $62,444 compared to FY 2026.

The Personnel Services category increased 17%, or $61,810, due, primarily to a charter change in 2024 that increased the Mayor's annual salary from $30,000 to $50,000 and the City Council member annual salaries from $15,000 to $25,000. This change went into effect on January 1, 2026. As such, FY 2026 included the partial-year impact of this charter change while FY 2027 includes the full cost impact. Effective July 1, 2027, and every July 1 thereafter, the annual salary of the mayor and councilmembers shall be automatically increased by 3% or by the average percentage increase in pay provided to city employees during the applicable fiscal year, whichever is less.

Authorized personnel totals 7 full-time-equivalents (FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Mayor*	1.0	1.0	1.0	1.0	1.0	-
Councilperson Post 1	1.0	1.0	1.0	1.0	1.0	-
Councilperson Post 2	1.0	1.0	1.0	1.0	1.0	-
Councilperson Post 3	1.0	1.0	1.0	1.0	1.0	-
Councilperson Post 4	1.0	1.0	1.0	1.0	1.0	-
Councilperson Post 5	1.0	1.0	1.0	1.0	1.0	-
Councilperson Post 6	1.0	1.0	1.0	1.0	1.0	-
	7.0	7.0	7.0	7.0	7.0	-

The Maintenance and Operations category increased <1%, or $634, solely related to growth in IT Professional Services allocations, which represent an allocation of software based on various methodologies (e.g. # of personnel, primary users, etc.), and partially offset through reductions in the discretionary spending accounts (from $9,200 to $8,000 for the Mayor and from $8,000 to $6,000 for each City Council member).



City Administration (including City Clerk and Economic Development)

CHRIS LAGERBLOOM
CITY ADMINISTRATOR



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JOHN ROBISON
ASSITANT CITY ADMINISTRATOR



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Our Community Vision is to advance Alpharetta as a signature City by:

Offering the highest quality of environment for our residents and businesses.

Fostering strong sense of community including safety and security.

Providing a business climate that attracts the top echelon companies.

The icons set forth above are used throughout the Budget Narrative to identify the link between the city's Community Vision and the goals and objectives of our various departmental divisions/projects.

City Administration (including City Clerk and Economic Development)

Administration, City Attorney, City Clerk, Public Information, and Economic Development

Mission Statement

The mission of the City Administrator's Office is to carry out the policies and implement the goals established by the City Council in providing services to the citizens in the most effective and economical manner while promoting awareness and understanding of services, policies, information, programs, and priorities that result in an informed and participative community while also furthering the prosperity of our business community.

Goals and Objectives



- ✓ To improve quality of service to citizens of the City of Alpharetta.



- ✓ To improve morale and promote teamwork among all employees.



- ✓ To improve coordination and administration of interdepartmental activities.



- ✓ To promote better communication between all levels of government and the citizens.



- ✓ To use technology to improve processes for citizen input into facets of governance.



- ✓ To increase the public/government interaction through the City's website.



- ✓ Focus on Economic Development to fulfill the vision of the City of Alpharetta as the preeminent place to live, work, learn, and play.

Key Issues

- ✓ Continue the development of a "customer-driven" organizational culture among the staff.
- ✓ Strengthening the relationship between the City Council and staff - building bridges in communication to facilitate the relationship.
- ✓ Continue the informative, cooperative endeavor of providing the best available information for the City Council to remain effective and successful in their offices.
- ✓ Meet the service provision and service level demand of the citizens while ensuring the most cost-effective delivery of those services.
- ✓ Continue efforts toward more effective communication strategies with citizens through enhanced public awareness and public education programs.

- ✓ Seek to work with the local legislative delegation on the introduction or support of legislation that benefits the City of Alpharetta and its citizens.
- ✓ Anticipate the future population and area growth of the City as a result of continued development and annexations, ensuring staff meets the expectations of existing and new residents.
- ✓ Continue efforts toward enhancing the compensation and benefits package to attract and retain the very best employees.

Statement of Revenues and Expenditures

City Administration (incl. City Clerk, and Economic Dev.)
General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual*	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Licenses and Permits:					
Alcohol Beverage Permits	$ 2,300	$ 1,500	$ 1,377	$ 1,000	$ 1,000
Charges for Services:					
Other	3,818	4,124	802	3,000	2,200
Other Revenue:	-	2,343	2,413	1,000	-
TOTAL	**$ 6,118**	**$ 7,967**	**$ 4,592**	**$ 5,000**	**$ 3,200**
EXPENDITURES					
Personnel Services:					
Salaries (incl. Temp. Svcs)	$ 755,789	$ 1,032,517	$ 1,133,820	$ 1,351,778	$ 1,419,941
Overtime	-	269	738	-	-
Group Insurance	108,947	161,334	191,768	265,156	269,630
FICA	56,010	69,007	76,979	104,898	110,124
Pension (Defined Benefit)	99,998	64,009	64,727	31,012	36,827
Pension (401A Cont./Match)	95,587	135,494	153,337	211,396	223,064
Workers Compensation	18,610	23,259	28,055	27,854	30,164
OPEB Contribution	16,089	26,215	34,065	30,675	34,751
Miscellaneous	50,444	20,741	19,236	34,278	34,585
subtotal	*$ 1,201,474*	*$ 1,532,845*	*$ 1,702,725*	*$ 2,057,047*	*$ 2,159,086*
Maintenance & Operations:					
Professional Services	$ 70,534	$ 100,994	$ 269,928	$ 447,438	$ 316,500
Advertising	12,786	11,518	85,495	161,300	156,800
Employee Training	9,053	20,198	23,614	37,500	33,500
Employee Travel	5,300	6,622	17,378	28,000	38,000
General Supplies	45,843	39,141	64,512	101,452	106,650
Maint. Contracts/IT Services	81,187	218,810	211,898	417,026	410,287
Miscellaneous	4,938	32,097	23,309	18,891	6,700
subtotal	*$ 229,641*	*$ 429,381*	*$ 696,133*	*$ 1,211,607*	*$ 1,068,437*
TOTAL	**$ 1,431,114**	**$ 1,962,226**	**$ 2,398,858**	**$ 3,268,654**	**$ 3,227,523**

Notes:

* Economic Development function was reorganized from the Community Development Department to City Administration starting in FY 2025.

Budget Narrative

The FY 2027 Budget for City Administration totals $3.2 million and represents a decrease of -1%, or -$41,131 compared to FY 2026.

The Personnel Services category increased 5%, or $102,039 due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc. , which is partially offset through staff turnover and associated changes in salary and benefit choices (e.g. employee-only vs family coverage, etc.) as well as minor impacts associated with position reclassifications during FYs 2025/2026.

Authorized personnel total 10 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
City Administration						
Administrative Assistant II	-	1.0	-	-	-	-
Administrative Office Coordinator	-	1.0	1.0	1.0	1.0	-
Assistant City Administrator	1.0	1.0	1.0	1.0	1.0	-
City Administrator	1.0	1.0	1.0	1.0	1.0	-
Communications & Engagement Manager	-	-	-	1.0	1.0	-
Executive Office Coordinator	1.0	-	-	-	-	-
Municipal Project Manager	-	1.0	1.0	-	-	-
Public Comm. & Engagement Coordinator	-	1.0	1.0	-	-	-
Web Administrator	1.0	1.0	1.0	1.0	1.0	-
City Clerk						
Assistant City Clerk*	1.0	1.0	1.0	1.0	-	(1.0)
City Clerk	1.0	1.0	1.0	1.0	1.0	-
Municipal Records Officer*	-	-	-	-	1.0	1.0
Economic Development						
Director (Economic Development)	-	-	1.0	1.0	1.0	-
Manager (Economic Development)*	-	-	1.0	1.0	-	(1.0)
Coordinator (Economic Development)	-	-	1.0	-	-	-
Marketing Coordinator (Economic Development)	-	-	-	1.0	1.0	-
Program Manager (Economic Development)*	-	-	-	-	1.0	1.0
	6.0	9.0	11.0	10.0	10.0	-

* Position adjustments occurred during FY 2026.

The Maintenance and Operations category decreased -12%, or -$143,170, due primarily to the following:

- Decrease in professional services of -$130,938 (-29% reduction) due primarily to the removal of funding for election costs (FY 2026 included $150,000 for potential runoff election costs, which were not incurred), which is partially offset through increased funding for revenue auditing services ($11,000 growth to $35,000 funding level) to aid in tax compliance, temporary services funding (+$27,000) to assist the City Clerk

Division with staffing coverage in FY 2027, and funding (+$10,000) for the new citywide leadership initiative aimed at mentoring professional managerial skill growth in the city's supervisors and managers.

- Increase in general supplies of $5,198, or 5%, due primarily to funding ($5,000) for the new citywide leadership initiative aimed at mentoring professional managerial skill growth in the city's supervisors and managers.
- Decrease in small equipment of -$8,943 as FY 2026 included the one-time purchase of additional tables for the City Hall Community Room.
- All other departmental maintenance and operations accounts declined -$8,487, or -1%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

Statement of Revenues and Expenditures

Legal Services

General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
N/A	$ -	$ -	$ -	$ -	$ -
TOTAL	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
EXPENDITURES					
Maintenance & Operations:					
Professional Fees	$ 789,935	$ 636,323	$ 719,057	$ 800,000	$ 775,000
TOTAL	**$ 789,935**	**$ 636,323**	**$ 719,057**	**$ 800,000**	**$ 775,000**

* City Attorney services are provided through a contractual arrangement with a private law firm. Project specific legal service expenses are expensed to the pertinent project expense account and not included herein.

Performance Measurement

The following section provides detailed information on City Administration programs including performance measures.

- **City Administration**

  Statement of Service: Serves as the administrative head of the municipal government, coordinating municipal functions in order to provide effective, efficient, and responsive services. This office also ensures that ordinances, resolutions and regulations of the City Council and laws of the State of Georgia are enforced and is responsible for public relations activities.

City Administration Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Number of website hits	802,384	818,337	825,000	850,000	875,000
Website Page Views	1,472,814	4,289,211	4,323,670	4,500,000	4,700,000
Website Unique Page Views	1,279,902	1,391,137	1,418,326	1,400,000	1,425,000
Bounce Rate	61.72%	43.37%	39.00%	35.00%	30.40%
Newsletter Subscribers	7,212	7,836	8,074	9,052	8,200
Average Newsletter Opens	58.80%	63.10%	60.88%	72.10%	70
Facebook Followers	19,913	23,199	26,072	28,000	30,000
Twitter Followers	11,909	12,102	12,733	12,941	14,600

- **Economic Development**

  Statement of Service: The purpose of Economic Development is to foster and retain the business ecosystem of Alpharetta, both large and small. To advance policies that help Alpharetta grow and stay true to its values.

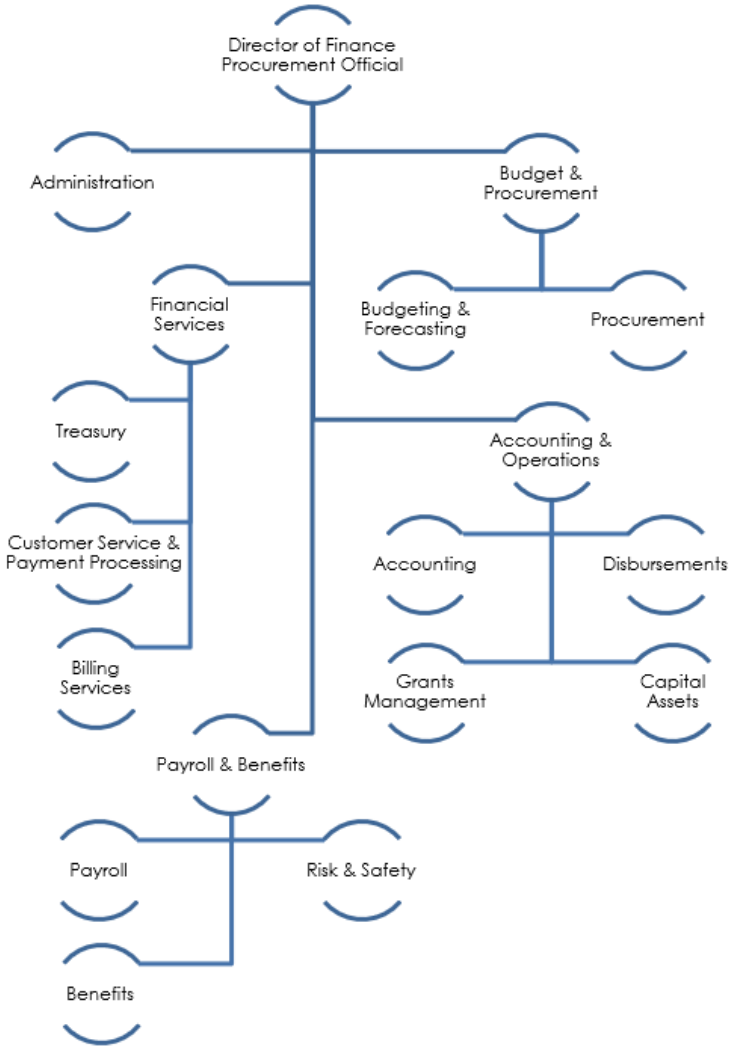
City Administration - Economic Development					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Assisted business investment projects secured	ND	ND	2	4	4
# of Businesses engaged through business retention and expansion program	ND	ND	0	10	15
# of Business recruitment outreach activities	ND	ND	4	4	4
# of Business investment leads generated	ND	ND	16	15	20
% of Ribbon cutting or grand opening ceremonies attended	ND	ND	100%	100%	100%
# of Website Visits to Connected Alpharetta Website	ND	ND	8,255	25,000	30,000
# of Social Media Reach Through Connected Alpharetta Channels	ND	ND	27,275	130,000	150,000
# of Social Media Engagements Through Connected Alpharetta Channels	ND	ND	1,806	10,000	15,000

Finance

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DIRECTOR



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Offering the highest quality of environment for our residents and businesses.

Fostering strong sense of community including safety and security.

Providing a business climate that attracts the top echelon companies.

Our Community Vision serves as the guiding principles for the planning and operation of our city government and each department structures its mission, goals, and objectives to facilitate achievement of our mission. The icons set forth above are used throughout the Budget Narrative to identify the link between the city's Community Vision and the goals and objectives of our various departmental divisions/projects.

Finance

Administration, Accounting, Budgeting, Employee Benefits and Compensation, Procurement, Grants Management, Risk Management, Treasury, Internal and External Services

Mission Statement

The mission of the Finance Department is to plan, receive, monitor, safeguard, invest, account, and expend the financial resources of the City of Alpharetta in the highest legal, ethical, and professional standard practical, and to respond to the service needs of our internal and external customers in a timely, courteous, and accurate manner.

Goals and Objectives



- ✓ Implementation of a finance/human resources system that utilizes current technology and provides heightened data analysis functionality and increases overall staff efficiencies.



- ✓ Process and procedure documentation program – conduct a comprehensive review of team processes, procedures, and practices.



- ✓ Expansion of the financial planning process – continue the development of a comprehensive long-term capital improvement program and multi-year budgeting, forecasting, and planning in order to more accurately predict our financial position in future years, and the impact current year decisions have on the city's long-range financial position.



- ✓ Update to Financial Management Program (e.g., policy revisions).



- ✓ Design and administer innovative and cost-effective benefit programs (e.g., Health Savings Accounts and enhanced Wellness Program) that meet the needs of today's diverse workforce and enhance the city's ability to attract, retain and reward employees.

Statement of Revenues and Expenditures

Finance

General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Charges for Services:					
Public Records Requests	$ -	$ 78	$ 31	$ -	$ -
TOTAL	**$ -**	**$ 78**	**$ 31**	**$ -**	**$ -**
EXPENDITURES					
Personnel Services:					
Salaries (incl. Temp Svcs)	$ 1,766,970	$ 1,867,112	$ 2,013,355	$ 2,048,819	$ 2,150,709
Group Insurance	412,756	426,319	475,768	516,539	539,504
FICA	122,721	132,651	141,084	156,770	185,596
Pension (Defined Benefit)	197,829	205,437	234,619	247,227	279,213
Pension (401A Cont./Match)	142,328	160,483	172,409	193,464	209,663
Workers Compensation	48,145	43,390	43,197	45,474	46,017
OPEB Contribution	38,438	48,418	50,982	49,366	52,267
Miscellaneous	1,161	772	308	464	2,119
subtotal	*$ 2,730,349*	*$ 2,884,581*	*$ 3,131,722*	*$ 3,258,123*	*$ 3,465,088*
Maintenance & Operations:					
Professional Services	$ 398,723	$ 463,484	$ 478,597	$ 484,828	$ 512,176
Printing	25,535	27,599	15,704	30,600	22,350
Employee Travel	6,302	3,925	2,867	5,200	5,950
Employee Training	9,250	7,347	9,102	9,600	9,900
Maint. Contracts/IT Services	305,407	308,592	314,796	346,697	405,138
General Supplies	43,135	45,135	40,304	52,980	49,780
Wellness Programs	113,949	100,852	-	35,000	73,025
Miscellaneous	6,988	43,461	3,616	9,997	8,000
subtotal	*$ 909,288*	*$ 1,000,394*	*$ 864,986*	*$ 974,902*	*$ 1,086,319*
Capital/Lease/Other:					
Int. on Property Tax Refunds	$ 4,924	$ -	$ 11,531	$ 7,500	$ 10,000
subtotal	*$ 4,924*	*$ -*	*$ 11,531*	*$ 7,500*	*$ 10,000*
TOTAL	**$ 3,644,561**	**$ 3,884,976**	**$ 4,008,239**	**$ 4,240,525**	**$ 4,561,407**

Budget Narrative

The FY 2027 Budget for Finance totals $4.6 million and represents an increase of 8%, or $320,882 compared to FY 2026.

The Personnel Services category increased 6%, or $206,965, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., minor impacts associated with position reclassifications during FYs 2025/2026, and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).

Authorized personnel total 20.5 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Accountant	3.5	3.5	3.0	3.0	3.0	-
Accounting & Operations Manager	1.0	1.0	1.0	1.0	1.0	-
Accounting Coordinator	1.0	1.0	1.0	1.0	1.0	-
Accounts Payable Technician	-	-	0.5	0.5	0.5	-
Benefits, Payroll, Safety & Risk Manager	-	-	1.0	1.0	1.0	-
Benefits Specialist	1.0	1.0	1.0	-	-	-
Benefits Coordinator	-	-	-	1.0	1.0	-
Billing Coordinator	1.0	-	-	-	-	-
Billing & Collections Coordinator*	-	-	-	-	1.0	1.0
Billing & Collections Representative*	1.0	1.0	1.0	1.0	-	(1.0)
Billing & Collections Supervisor*	-	-	-	-	1.0	1.0
Budget & Procurement Coordinator	3.0	3.0	3.0	3.0	3.0	-
Budget & Procurement Manager	1.0	1.0	1.0	1.0	1.0	-
Cash Management Coordinator	1.0	-	-	-	-	-
Customer Account Representative	1.0	1.0	1.0	1.0	1.0	-
Director	1.0	1.0	1.0	1.0	1.0	-
Office Manager*	1.0	1.0	1.0	1.0	-	(1.0)
Payroll & Benefits Coordinator	1.0	1.0	1.0	-	-	-
Payroll & Benefits Analyst	-	-	-	1.0	1.0	-
Payroll & Benefits Manager	1.0	1.0	-	-	-	-
Payroll Specialist	1.0	1.0	1.0	1.0	1.0	-
Revenue & Customer Service Manager	-	1.0	1.0	1.0	1.0	-
Safety & Risk Administrator	1.0	1.0	-	-	-	-
Safety & Risk Coordinator	-	-	1.0	1.0	1.0	-
Tax & Billing Manager*	-	1.0	1.0	1.0	-	(1.0)
Treasury Services Manager*	1.0	1.0	1.0	-	1.0	1.0
	21.5	21.5	21.5	20.5	20.5	-

* Position adjustments occurred during FY 2026.

The Maintenance and Operations category increased 11%, or $111,417, due primarily to the following:

- Increase in professional services of $27,348 (6% growth) due primarily to growth in banking fees (credit card fees).
- Increase in maintenance contracts/IT professional services of $58,441 (17% growth) due primarily to year one costs for revenue management software (occupational business licenses, hotel taxes, etc.) that will provide more effective service delivery for our customers and result in staff efficiencies (replaces current software solution), growth in citywide technology infrastructure costs (e.g. Microsoft Enterprise licensing costs including Copilot AI, etc.), department enterprise financial management software costs (e.g. Tyler Munis), coverage of general software inflationary cost growth including cyber security software, etc.
- Increase in funding for Wellness initiatives of $38,025 (109% growth) to a total $73,025 annual funding level that is necessary to support our current program offerings. Historically, the City funded more than $100,000 annually for wellness initiatives. In FY's 2025 and 2026, the City was able to utilize Cigna (healthcare provider) to offset our wellness program costs, but healthcare plan cost trends no longer allow for this.
- All other departmental maintenance and operations accounts declined -$12,397, or -11%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

Performance Measurement

The following section provides detailed information on Finance programs including performance measures.

- **Administration**

  Statement of Service: The purpose of the administrative arm of the Finance Department is to facilitate the success of the operating divisions through the provision of oversight, staff support, and internal and public advocacy. Finance administration provides fiduciary oversight and support to the various departments of the city and communicates the financial health of the city to the Mayor, City Council, and stakeholders. Administration is also responsible for cash and debt management.

Finance Admin Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of New GAAP/GASB financial requirements implemented	2	2	1	2	2
Bond rating maintained or upgraded	Maintain Aaa - AAA	Maintain Aaa - AAA	Maintain Aaa - AAA	Maintain Aaa - AAA	Maintain Aaa - AAA
Cash management program maximizing interest returns (all funds)	$5,758,356	$9,040,359	$8,483,195	$3,920,294	$2,490,375

- **External Services**

  Statement of Service: The purpose of the external services team is to provide accurate and efficient services to City of Alpharetta residents, businesses, and stakeholders through timely and accurate billing and collections processes and outstanding customer service.

Financial Services Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
% of bills generated on time	99%	99%	99%	99%	99%
% of bills collected on time	92%	92%	92%	92%	92%
# of Real estate tax bills generated	21,689	21,943	22,126	22,202	22,352
# of Personal property tax bills	3,190	3,256	3,232	3,343	3,393
# of Liens processed	129	112	66	100	100
# of Sanitation customers	17,488	17,661	17,909	18,059	18,269
% of Delinquent sanitation Accts	<10%	<10%	<10%	<10%	<10%

- **Internal Services**

  Statement of Service: The internal services arm of the Finance Department includes Accounting & Operations along with Budgeting & Procurement Services, each further defined as:

  - *Budget & Procurement*: The purpose of the budget/procurement division is to facilitate the financial planning process. This is accomplished through the budgeting and expenditure monitoring process in order to effectively distribute available resources consistent with city objectives and priorities. Responsibilities also include supporting all city departments with financial information, activities, transactions, and administration of their budget.
  - *Accounting & Operations*: Accounting services record the city's financial transactions. Responsibilities include financial reporting and disbursement activities. The accounting function also provides financial data for the purpose of compiling management and public reports which reflect the financial condition of the city in accordance with Generally Accepted Accounting Principles.

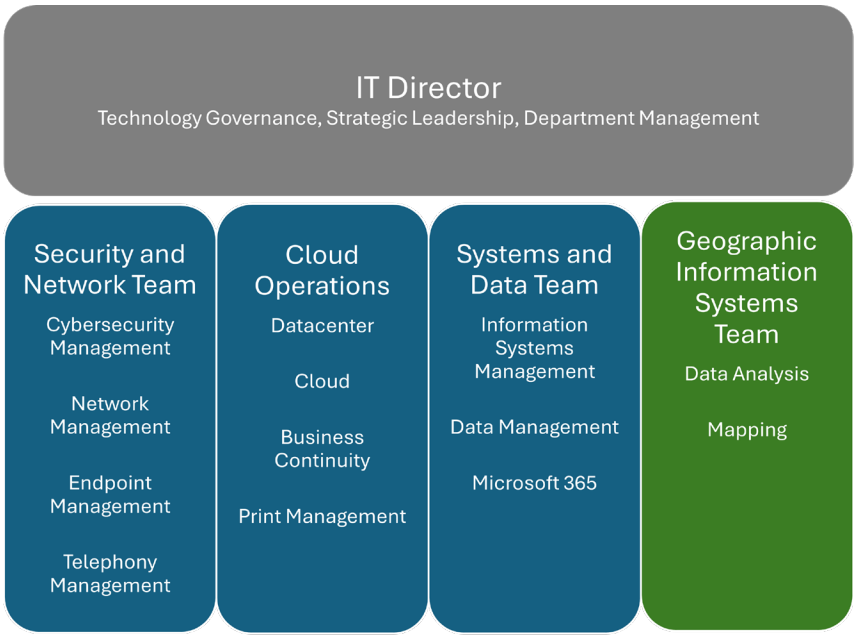
Accounting, Budget, Procurement Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Audited CAFR to be published within 180 days of fiscal year end	12/20/2023	12/26/2024	11/21/2025	11/30/2026	11/30/2027
GFOA Certificate of Achievement for Excellence in Financial Reporting	Yes	Yes	Yes	Yes	Yes
GFOA Outstanding Achievement in Popular Annual Financial Reporting	Yes	Yes	Yes	Yes	Yes
GFOA Distinguished Budget Award	Yes	Yes	Yes	Yes	Yes
Percentage of General Fund departments within appropriated budget*	100%	100%	100%	100%	100%
% of Budgeted employees participating in direct deposit	100%	100%	100%	100%	100%
Average # of vendor responses to Bids/Requests for Proposals	4	4	5	5	5

Information Technology

ADAM MONTGOMERY
DIRECTOR



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Our Community Vision is to advance Alpharetta as a signature City by:

Offering the highest quality of environment for our residents and businesses.

Fostering strong sense of community including safety and security.

Providing a business climate that attracts the top echelon companies.

Our Community Vision serves as the guiding principles for the planning and operation of our city government and each department structures its mission, goals, and objectives to facilitate achievement of our mission. The icons set forth above are used throughout the Budget Narrative to identify the link between the city's Community Vision and the goals and objectives of our various departmental divisions/projects.

Information Technology

Security, Cloud, Network, Systems, and GIS

Mission Statement

Information Technology's mission is to provide high-quality technology products, services, and human resources to City departments that enable them to accomplish their goals and objectives. The Department of Information Technology strives to continuously improve the delivery of services and minimize costs while accommodating future City growth.

Goals and Objectives

As we accomplish our mission, the City of Alpharetta Department of Information Technology will be known to provide high-quality services by:



✓ Being recognized by City departments as having a high level of skill and knowledge.



✓ Providing excellent service to all City departments as measured by the City's performance standards.



✓ Acquiring and supporting proven, sustainable technology solutions that are continually maintained and updated.



✓ Helping City departments to improve and extend the functionality of major systems by offering systems integration and software development services.

Statement of Revenues and Expenditures

Information Technology
General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
EXPENDITURES					
Personnel Services:					
Salaries (incl. intern svcs.)	$ 1,273,133	$ 1,341,459	$ 1,397,451	$ 1,547,010	$ 1,644,909
Group Insurance	246,383	259,541	257,515	310,305	382,069
FICA	93,595	98,916	102,888	117,747	125,312
Pension (Defined Benefit)	116,670	134,952	141,793	165,233	192,388
Pension (401A Cont./Match)	106,121	121,142	124,226	155,617	169,823
Workers Compensation	33,173	33,859	30,629	33,518	35,075
OPEB Contribution	26,369	37,738	36,892	36,914	40,409
Miscellaneous	232	697	694	156	1,156
subtotal	*$ 1,895,677*	*$ 2,028,304*	*$ 2,092,089*	*$ 2,366,500*	*$ 2,591,141*
Maintenance & Operations:					
Professional Services	$ 1,950	$ -	$ 1,089	$ 2,500	$ 2,500
Employee Travel	12,665	15,046	24,538	20,000	30,000
Employee Training	9,967	39,213	13,976	22,500	22,500
Maint. Contracts/IT Svcs.	139,151	337,510	210,413	198,061	267,539
General Supplies	5,687	9,083	4,112	9,000	8,500
Small Equipment	12,295	10,602	6,905	14,500	10,000
Miscellaneous	1,548	2,199	1,903	3,000	2,500
subtotal	*$ 183,263*	*$ 413,654*	*$ 262,935*	*$ 269,561*	*$ 343,539*
TOTAL	**$ 2,078,939**	**$ 2,441,958**	**$ 2,355,024**	**$ 2,636,061**	**$ 2,934,680**

Budget Narrative

The FY 2027 Budget for Information Technology totals $2.9 million and represents an increase of 11%, or $298,619, compared to FY 2026.

The Personnel Services category increased 9%, or $224,641, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., minor impacts associated with position reclassifications during FYs 2025/2026, and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).

- Annualized cost impact associated with the reorganization of the Public Safety System Administrator from the Police Department into the Information Technology Department during FY 2026 (effective February 2026). Specifically, FY 2026 included position funding within the Information Technology Department for 5 months (February-June 2026).

Authorized personnel total 14 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Cloud Operations Analyst	-	-	1.0	1.0	1.0	-
Cloud Operations Manager	-	-	1.0	1.0	1.0	-
Director	1.0	1.0	1.0	1.0	1.0	-
GIS Manager	1.0	1.0	1.0	1.0	1.0	-
GIS Administrator	-	-	1.0	1.0	1.0	-
IT Administrator	4.0	4.0	-	-	-	-
IT Analyst	1.0	1.0	-	-	-	-
IT CityWorks Administrator	1.0	1.0	-	-	-	-
Information Systems Manager	4.0	4.0	1.0	1.0	1.0	-
Information Security Manager	-	-	1.0	-	-	-
Information Security Administrator*	-	-	-	2.0	1.0	(1.0)
Information Technology Technician*	1.0	1.0	1.0	1.0	-	(1.0)
Microsoft 365 Administrator*	-	-	-	-	1.0	1.0
Network Manager*	-	-	1.0	1.0	-	(1.0)
Network Administrator	-	-	1.0	1.0	1.0	-
Public Safety System Administrator*	-	-	-	-	1.0	1.0
Security and Network Manager*	-	-	-	-	1.0	1.0
Systems Administrator	-	-	3.0	2.0	2.0	-
Technology Support Technician*	-	-	-	-	1.0	1.0
	13.0	13.0	13.0	13.0	14.0	1.0

* Position adjustments occurred during FY 2026. The Public Safety System Administrator position was transferred from the Police Department during FY 2026 (prior position classification was a Special Projects and Data Analyst).

The Maintenance & Operations category increased 27%, or $73,978, due primarily to the following:

- Increase in maintenance contracts/IT professional services of $69,478 (35% growth) due primarily to adjustments in software cost allocation methodology (citywide IT spend growth is below inflation trends, but allocations to individual departments will vary from the overall growth rate), growth in citywide technology infrastructure costs (e.g. Microsoft Enterprise licensing costs including Copilot AI, etc.), coverage of general software inflationary cost growth including cyber security software, Operating Initiative funding[13] for FY 2027 totaling $16,000 for ESRI ArcGIS Indoors, etc.

[13] Please refer to the *Operating Initiatives* section of this document for more information on this initiative.

- Increase in employee travel/training (professional development) of $10,000 (24% growth) to augment training and industry knowledge of new and existing team members.
- All other departmental maintenance and operations accounts declined -$5,500, or -19%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

Performance Measurement

The following section provides detailed information on Information Technology programs including performance measures.

- **Information Technology**

  Statement of Service: Information Technology provides hardware, software, and support services to all departments in technology-related areas.

Information Technology Department

Performance Measures for Calendar Year 2025

(Calendar Year Stats)

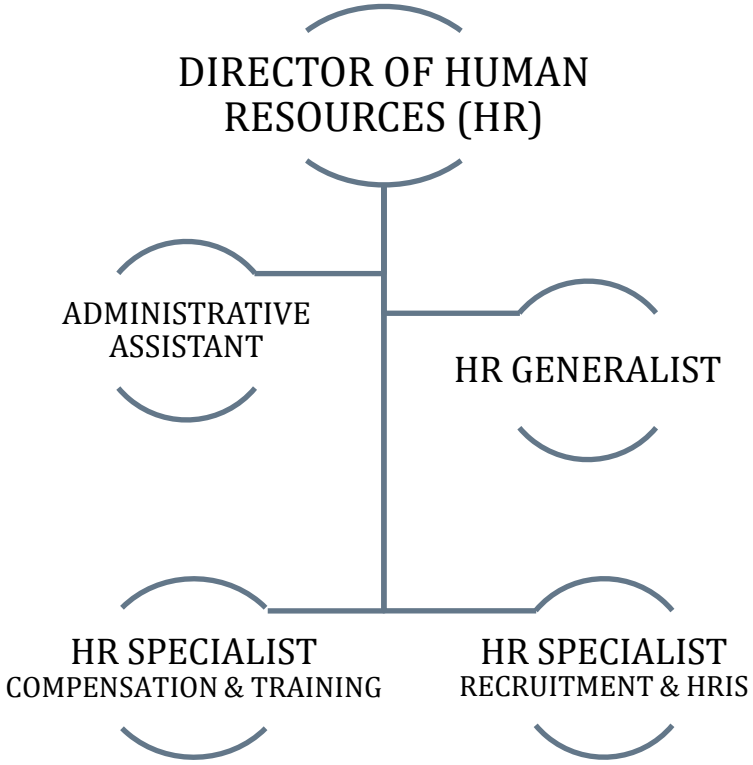
	2025	Department Target	Results
IT Operations			
Number total cases	6,458		6,458
Number resolved in 0-1 week	5,464		5,464
% resolved in 0-1 week	85%	80%	A
Number resolved in 0-2 weeks	5,792		5,792
% resolved in 0-2 weeks	90%	90%	A
GIS			
Number total cases	184		184
Number resolved in 0-1 week	132		132
% resolved in 0-1 week	72%	33%	A
Number resolved in 0-2 weeks	150		150
% resolved in 0-2 weeks	82%	75%	A
OTHER MEASURES			
Emails			
Number of Inbound	3,512,851	N/A	3,512,851
Number of Outbound	752,369	N/A	752,369
Number of Internal	3,211,447	N/A	3,211,447
Number of Rejected Emails	1,374,727	N/A	1,374,727
% of Rejected Emails	39%	N/A	39%

Human Resources

CRIS RANDALL
HUMAN RESOURCES DIRECTOR



CRandall@alpharetta.ga.us



Our Community Vision is to advance Alpharetta as a signature City by:

Offering the highest quality of environment for our residents and businesses.

Fostering strong sense of community including safety and security.

Providing a business climate that attracts the top echelon companies.

Our Community Vision serves as the guiding principles for the planning and operation of our city government and each department structures its mission, goals, and objectives to facilitate achievement of our mission. The icons set forth above are used throughout the Budget Narrative to identify the link between the city's Community Vision and the goals and objectives of our various departmental divisions/projects.

Human Resources

Administration, Talent and Compensation Management, Employee Relations, Development, Recruitment and Retention

Mission Statement

HR is committed to achieve the highest standards of public administration through sound HR practices, and to EMPOWER and ENCOURAGE employees by providing the support, training and development necessary to drive strong PERFORMANCE and to support CAREER GROWTH in public service.

Synopsis

To successfully carry out our core mission, the Human Resources Team shall:

- ✓ Ensure that employees are provided with the same concern, respect, and caring attitude within the organization that they are expected to share with every customer, both external and internal.
- ✓ Be committed to achieve the highest standards of public administration through sound HR practices, to ensure compliance with federal and local employment laws.
- ✓ Act as a catalyst in providing employees with support, training and development needed to fulfill the duties and responsibilities of their position as a public servant and contribute at optimum levels towards the success of the community and the City of Alpharetta.
- ✓ Establish, administer, and effectively communicate sound policies, rules, and practices that treat employees with dignity, respect and equality while maintaining compliance with employment and labor laws, organizational directives, and the mission, vision, and core values of the City of Alpharetta.
- ✓ Act as strategic partner and trusted advisor to senior management and supervisory staff on talent management, workforce planning and staffing, organizational effectiveness, training and development, engagement and corrective actions, compliance, and related matters.
- ✓ Collaborate with Finance Department to develop and provide a competitive salary and benefit package that supports our employees and meets the needs and goals of the City of Alpharetta.

Goals and Objectives

- ✓ Develop and maintain appropriate personnel policies and procedures that provide flexibility in the management of personnel while maintaining compliance with current employment law and practice so as to effectively protect the City.
- ✓ Improve operational efficiency, effectiveness and reduce costs by elevating the overall health and wellbeing of our employees.
- ✓ Develop, implement, evaluate. enforce and communicate job classification and compensation policies and programs. This is a critical HR role as a well-designed classification and compensation system will help attract, motivate and retain employees as well as work within fiscal constraints.
- ✓ Develop and deliver effective training programs to employees so as to constantly improve customer service delivery, efficiency of operations, and the overall effectiveness and professionalism of the organization.
- ✓ Identify and develop internal talent and future leaders to build succession pipelines to meet current and future talent needs in critical roles.
- ✓ Develop and maintain a Strategic Human Resources Plan to ensure continuity of operations, effective succession planning in key positions, appropriate staffing to meet City goals and customer service expectations and anticipate fiscal needs and impacts.
- ✓ Serves as advisor and resource for employees and supervisors regarding employee relations cases. Assist and educate employees about operating within the bounds of personnel policies. Assist supervisors address difficult and complex employee situations, help in resolving labor disputes, and respond with the appropriate level of corrective action while working to prevent retaliation.
- ✓ Elevate and maintain employee engagement by enhancing communication channels and fostering an information rich environment.
- ✓ Leverage technology to enhance the effectiveness and efficiencies of certain labor intense HR functions and automate routine and administrative tasks in order to be able to focus on strategic tasks.

Statement of Revenues and Expenditures

Human Resources
General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Charges for Services:					
Public Records Requests	$ 85	$ 29	$ 218	$ -	$ -
TOTAL	**$ 85**	**$ 29**	**$ 218**	**$ -**	**$ -**
EXPENDITURES					
Personnel Services:					
Salaries	$ 373,097	$ 423,033	$ 482,492	$ 500,956	$ 525,422
Overtime	-	-	-	-	-
Group Insurance	35,628	46,123	66,970	72,022	95,614
FICA	31,132	34,926	38,744	38,323	40,195
Pension (Defined Benefit)	29,529	21,942	15,105	17,443	20,578
Pension (401A Cont./Match)	33,690	44,559	55,105	65,609	68,826
Workers Compensation	7,897	9,073	9,966	11,244	11,273
OPEB Contribution	7,982	7,969	11,969	12,383	12,988
Tuition Reimbursement	11,621	30,354	57,517	55,000	65,000
Miscellaneous	232	77	-	-	-
subtotal	*$ 530,807*	*$ 618,055*	*$ 737,869*	*$ 772,980*	*$ 839,896*
Maintenance & Operations:					
Professional Services	$ 90,066	$ 74,906	$ 47,019	$ 79,000	$ 84,000
Employee Travel	5,397	2,883	3,083	4,500	5,500
Employee Training	10,405	5,647	6,812	8,000	8,800
Maint. Contracts/IT Svcs.	48,965	115,900	145,845	158,539	159,498
General Supplies	5,643	7,054	5,289	10,525	10,525
Employee Recognition	62,128	70,785	46,864	75,000	85,000
Miscellaneous	11,828	3,093	170	2,000	1,000
subtotal	*$ 234,432*	*$ 280,268*	*$ 255,082*	*$ 337,564*	*$ 354,323*
TOTAL	**$ 765,239**	**$ 898,324**	**$ 992,950**	**$ 1,110,544**	**$ 1,194,219**

Budget Narrative

The FY 2027 Budget for Human Resources totals $1.2 million and represents an increase of 8%, or $83,675, compared to FY 2026.

The Personnel Services category increased 9%, or $66,916, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., changes in staff benefit options (e.g. employee-only vs family coverage, etc.), and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).
- Increase in tuition reimbursement funding from $55,000 to $65,000 to cover growth in program utilization.

Authorized personnel total 5 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Administrative Assistant II	1.0	1.0	1.0	1.0	1.0	-
Director	1.0	1.0	1.0	1.0	1.0	-
Human Resources Generalist	-	-	1.0	1.0	1.0	-
Human Resources Manager	1.0	1.0	-	-	-	-
Human Resources Specialist (General; Compensation & Training)	1.0	1.0	2.0	2.0	2.0	-
	4.0	4.0	5.0	5.0	5.0	-

The Maintenance and Operations category increased 5%, or $16,759, due primarily to the following activity:

- Increase in professional services of $5,000 (6% growth) due primarily to additional funding for pre-employment evaluations (including psychological evaluations as dictated by the underlying position requirements).
- Increase in employee travel/training (professional development) of $1,800 (14% growth) to augment training and industry knowledge of team members.
- Increase in maintenance contracts/IT professional services of $959 (1% growth) due primarily to growth in citywide technology infrastructure costs (e.g. Microsoft Enterprise licensing costs including Copilot AI, etc.), coverage of general software inflationary cost growth including cyber security software, etc.
- Increase in employee recognition of $10,000 (13% growth) to provide additional funding for Public Service Recognition Week (May) that focuses on honoring our dedicated employees that serve our community with pride and purpose.

- All other departmental maintenance and operations accounts decreased -$1,000, or -8%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

Performance Measurement

The following section provides detailed information on Human Resources programs including performance measures.

- **Administration**

  Statement of Service: The administrative function monitors legal compliance and employee relations in order to effectively administer sound policies, and practices that will treat all employees equally while maintaining compliance with employment and labor laws.

Human Resources Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Human Resources Dept. annual turnover percentage	50%	25%	0%	0%	0%
City-wide turnover percentage	10.27%	10%	9%	11%	9%
Total # full-time equivalents (full-time, part-time, seasonal, and elected)	584	626	633	600	615
Total # VETERANS full-time equivalents (full-time, part-time, seasonal, and elected)	48	53	57	55	55
HR staff to total full-time equivalent employee ratio	0.685	0.799	0.790	0.833	0.813



THE CITY OF ALPHARETTA GEORGIA

WELCOME! We are always looking for enthusiastic candidates passionate for their work and great sense of pride for serving our wonderful community!

Our current vacancies can be found via the hyperlink below. If interested in a position that is not currently open, fill out a Job Interest Card to be notified via e-mail when the position is open.

https://www.governmentjobs.com/careers/alpharetta

- **Recruitment and Retention**

  Statement of Service: The recruitment and retention function facilitate programs to continually increase the quality of the workforce through placing, training, and retaining highly qualified individuals who have an educational background, knowledge, and competencies to perform at above average levels.

Human Resources Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Employment & Retention					
Average cost per hire - Regular positions	$6,100	$6,200	$6,250	$6,400	$6,500
Average cost per hire - Seasonal positions	$750	$780	$795	$850	$850
# of Online job postings hits	125,725	128,191	139,676	150,000	163,000
# of Job interest cards received	1,544	1,940	5,117	2,250	5,600
# of Applications reviewed	1,610	1,955	2,316	2,250	2,790
# of Qualified applications processed	859	923	1,153	1100	1350
# of New hires - Regular positions	55	62	41	45	25
# of New hires - Seasonal positions	83	95	115	120	125
# of Internal promotions	57	26	29	40	32
# of Separations (not including retirement)	33	34	33	31	25
# of Retirements	16	10	38	20	15
# New hire orientation sessions	12	12	12	12	12
Workforce Management					
% of Employees rated "Exceeds" on performance review	46.3%	27.7%	33.3%	54.0%	45.5%
% of Employees rated "Meets" on performance review	53.7%	68.9%	62.4%	44.0%	50.5%
% of Employees underperforming on annual review	0.0%	3.4%	4.2%	2.0%	3.0%
% of Employees on "Performance Improvement Plan"	0.1%	0.1%	3.2%	1.5%	1.0%
# Employee Relation Cases	52	73	68	60	60
# Return-to-Work and Light-Duty Cases"	-	28	65	45	50
# Job Descriptions Revised	110	13	65	50	40
Education Incentive - Professional Development					
# enrollments by program*					
Doctorate Degree	0	0	0	0	0
Master's Degree	2	8	13	14	10
Bachelor's Degree	4	12	12	18	15
Associate's Degree	2	3	5	4	5
Certificate Programs	1	1	3	1	1
Total # of employees receiving education incentive	9	24	33	37	31
Other Metrics					
# Payroll action forms processed	1578	1468	1452	1700	1500
# Verification of Employment processed"	-	32	64	44	58
# Open Records Requests"	-	32	40	40	50
# Service Awards"	-	55	52	75	67
# CRASE Trainings"	-		49	75	85

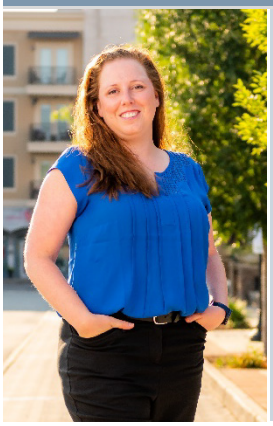
^NEO scheduled for at least once a month starting FY23

* FY22 - program partially unfunded due to budget constraints

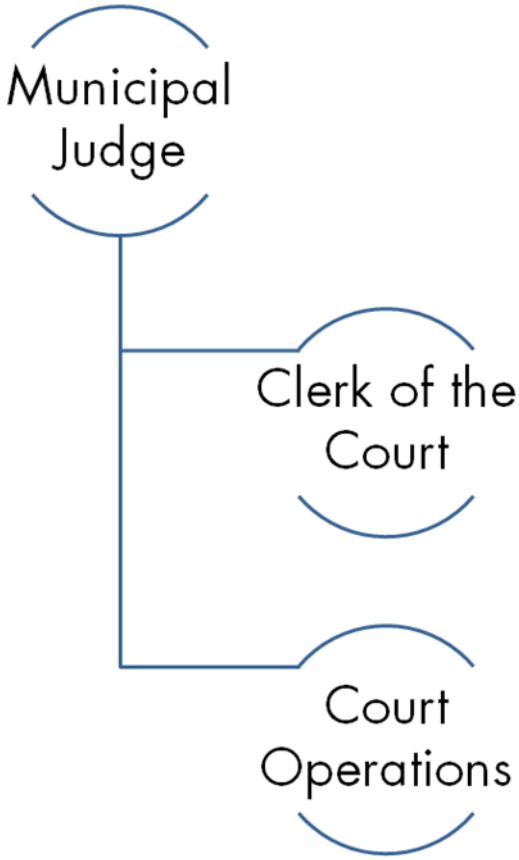
" Started tracking measures in FY25

Municipal Court

BROOKE LAPPIN
DIRECTOR



BLappin@alpharetta.ga.us



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Fostering strong sense of community including safety and security.

Providing a business climate that attracts the top echelon companies.

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Municipal Court

Administration, Employee Recruitment and Retention

Mission Statement

To grow and maintain sufficient staffing, infrastructure, and general court services for the City of Alpharetta; to educate and inform persons who attend court; to ensure the citizens' rights are observed and protected; to achieve justice and fundamental fairness in all matters including cases that go to trial and those that are settled pre-trial; and to efficiently and responsibly serve all citizens living in the community.

Goals and Objectives

- ✓ Provide professional, quality service.
- ✓ Monitor court sessions and continue to improve efficiency.
- ✓ Develop operations guide to use internally.
- ✓ Enhance reporting to state and city departments.
- ✓ Review and enhance current reports/forms.
- ✓ Enhance the current data that is shared between Court/Police.
- ✓ Review, improve, and update day to day operations.
- ✓ Provide proper training to ensure compliance with all State laws and regulations.
- ✓ Continue to cross-train employees.

Statement of Revenues and Expenditures

Municipal Court
General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Intergovernmental					
Milton IGA (Court Svcs)	$ 142,065	$ 128,734	$ 165,209	$ 196,663	$ 197,760
TOTAL	**$ 142,065**	**$ 128,734**	**$ 165,209**	**$ 196,663**	**$ 197,760**
EXPENDITURES					
Personnel Services:					
Salaries	$ 476,608	$ 530,700	$ 613,318	$ 662,725	$ 693,311
Overtime	107,924	97,013	102,666	105,000	110,000
Group Insurance	119,785	142,010	155,301	173,386	170,761
FICA	43,019	46,342	53,106	58,642	61,349
Pension (Defined Benefit)	19,584	11,417	14,171	16,646	19,758
Pension (401A Cont./Match)	55,201	58,099	66,793	88,937	94,493
Workers Compensation	8,655	10,145	10,780	12,224	12,291
OPEB Contribution	6,891	11,271	12,944	13,463	14,160
Miscellaneous	77	-	-	387	193
subtotal	*$ 837,745*	*$ 906,997*	*$ 1,029,079*	*$ 1,131,410*	*$ 1,176,316*
Maintenance & Operations:					
Professional Services	$ 80,430	$ 52,066	$ 53,378	$ 56,600	$ 59,000
Land/Building Rental	81,300	81,300	81,300	81,300	81,300
Printing	5,338	2,728	3,705	8,000	6,000
Employee Training	4,253	7,387	5,380	10,000	7,000
Employee Travel	1,005	3,193	10,328	10,000	10,000
Maint. Contracts/IT Svcs.	91,524	78,918	70,536	101,290	104,088
General Supplies	8,053	7,959	10,842	10,350	10,950
Utilities	-	-	-	-	-
Miscellaneous	4,885	-	137	1,700	-
subtotal	*$ 276,790*	*$ 233,550*	*$ 235,606*	*$ 279,240*	*$ 278,338*
TOTAL	**$ 1,114,535**	**$ 1,140,547**	**$ 1,264,685**	**$ 1,410,650**	**$ 1,454,654**

Budget Narrative

The FY 2027 Budget for Municipal Court totals $1.5 million and represents an increase of 3%, or $44,004, compared to FY 2026.

The Personnel Services category increased 4%, or $44,906, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125), which is partially offset through changes in staff benefit options (e.g. employee-only vs family coverage, etc.).

Authorized personnel total 7.5 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Administrative Assistant I	-	-	2.0	1.0	1.0	-
Director	1.0	1.0	1.0	1.0	1.0	-
Chief Court Clerk	1.0	1.0	1.0	1.0	1.0	-
Deputy Court Clerk	2.0	2.0	1.0	2.0	2.0	-
GCIC Coordinator	1.0	1.0	1.0	1.0	1.0	-
City Solicitor	1.0	1.0	1.0	1.0	1.0	-
Judge	0.5	0.5	0.5	0.5	0.5	-
	6.5	6.5	7.5	7.5	7.5	-

The Maintenance and Operations category was flat at 0% change, or -$902, and included the following activity:

- Increase in professional fees of $2,400 (4% growth) due primarily to growth in translator services and substitute solicitor services.
- Increase in maintenance contracts/IT professional services of $2,798 (3% growth) due primarily to growth in citywide technology infrastructure costs (e.g. Microsoft Enterprise licensing costs including Copilot AI, etc.), coverage of general software inflationary cost growth including cyber security software, etc.
- All other departmental maintenance and operations accounts decreased -$6,100, or -5%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

Performance Measurement

The following section provides detailed information on Municipal Court programs including performance measures.

- **Violations Bureau**

  Statement of Service: The purpose of the Municipal Court is to process all alleged violations of city Ordinances and certain state laws in a fair, impartial, expeditious, accurate, and fiscally responsible manner. The Violations Bureau holds traffic and state court, monitors and handles all cash bonds and manages all Court records.

Municipal Court Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Citations received to process	11,478	9,350	10,177	12,000	13,000
Total # of cases disposed	11,349	8,934	10,504	12,000	13,000
# of Court sessions	192	192	190	192	192
Annual deposits (Court Fines)	$1,987,587	$1,591,546	$1,686,141	$1,750,000	$1,770,000



Buying or selling something online? Use our E-Commerce Safe Trade Zone!

Towards the front of the Police Department parking lot (located at 2565 Old Milton Parkway), there are two spaces reserved specifically for a safe trade zone.

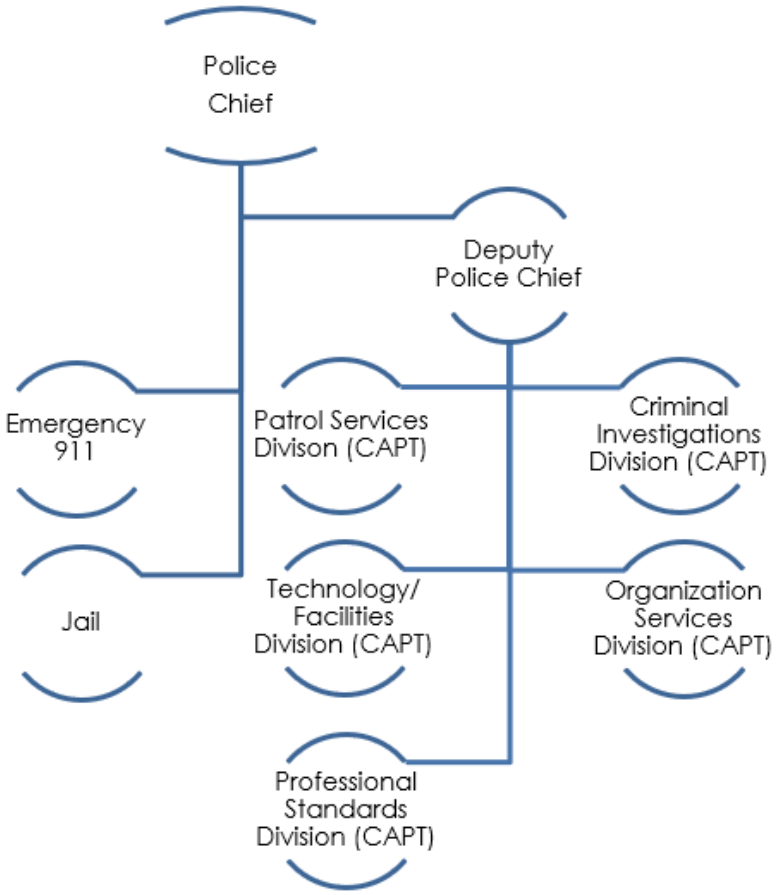
These spaces are clearly marked and are under constant video surveillance, so they're always available for use!

Police

TRENT LINDGREN
POLICE CHIEF



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Providing a business climate that attracts the top echelon companies.

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Police

Administration, Police, Jail, and Emergency 911

Mission Statement

Public Safety: It is the **Mission** of the **Alpharetta Police Department** to **Enhance** the **Quality** of **Life** of those that **Live**, **Work**, and **Play** in the **City of Alpharetta**.

Our primary responsibility may be law enforcement, but our approach and philosophy are based on the fundamental mission of enhancing the quality of life of everyone who lives, works, and plays in Alpharetta. Focusing on that mission means that we sometimes take non-traditional approaches to community policing, crime prevention, and working with the public. Yes, we do investigate crimes, make arrests, and write traffic tickets, but we work very hard to build strong relationships with the people we serve, educate the public, and address community issues so that less crime occurs, and everyone enjoys a better life in Alpharetta.

That mission and how we approach policing has earned the Alpharetta Police Department amazing support from the community and enables us to attract the finest Police Officers who have chosen this profession to serve the public.

Our professional Police Officers and civilian support staff are united by their concern for those who live, work, and play in Alpharetta and are connected through our core values:

Courageous Spirit
The risks of your job are real. Persevere in the face of adversity.

Selfless Service
Put the welfare of the public and your team above your own. Add value to others.

Excellence With Integrity
Do what is right and do it well.

Divisions

While we operate several specialized units, all our sworn Officers are, first and foremost, Patrol Officers, the backbone of community policing. They then receive advanced training to prepare them to provide additional, specialized services. Our team is also comprised of non-sworn civilians who provide professional support services.

- Uniform Patrol
- Criminal Investigations
- K9
- Community Response Team
- Traffic Enforcement
- DUI
- Motors
- Community Services
- Record Support Services
- Logistics
- Jail
- Emergency 911

Goals and Objectives

- ✓ Crime Prevention – Partner with the community through the Alpharetta Community of Excellence (ACE) program, Crime-Free Multifamily Housing, and building partnerships and mitigating problems through education and enforcement.
- ✓ Uniform Patrol - Increase visible presence in the community with an emphasis on residential neighborhoods.
- ✓ Criminal Investigation - Maintain a case clearance rate above national averages through strong local investigative efforts and appropriate partnerships with other federal, state, and local law enforcement agencies.
- ✓ Traffic Safety - Identify and address traffic and pedestrian concerns through engineering, education, and enforcement. Build an effective strategy utilizing a collaborative effort between city departments.



Statement of Revenues and Expenditures

Police*

General Fund

	Police & Fire FY 2023 Actual	*Police & Fire* FY 2024 Actual	*Police & Fire* FY 2025 Actual	*Police only* FY 2026 Amended Budget	*Police only* FY 2027 Recommended Budget
REVENUES					
Licenses and Permits	$ 7,051	$ 38,212	$ 47,207	$ -	$ -
Intergovernmental:					
City of Milton IGA (CAD/RMS)	-	-	-	140,000	-
Other	4,633	22,261	29,303	8,722	-
Charges for Services:					
Reports	24,547	22,413	26,680	25,000	25,000
Services	209,650	204,295	195,045	200,000	200,000
False Alarms	51,902	77,524	53,518	65,000	60,000
Fire Plan Review	208,020	92,393	159,232	-	-
Bond Processing Fees	-	-	-	43,202	-
Tesla Supercharger Fees	-	-	-	-	100,000
Other	2,025	17,250	12,075	-	-
Fines & Forfeitures:					
Municipal Court Fines	1,987,587	1,591,546	1,686,141	1,750,000	1,800,000
School Zone/Other Citations	1,300,188	923,969	751,657	525,000	400,000
Other Revenue	200	2,566	4,215	-	-
TOTAL	**$ 3,795,804**	**$ 2,992,429**	**$ 2,965,073**	**$ 2,756,924**	**$ 2,585,000**
EXPENDITURES					
Personnel Services:					
Salaries	$ 17,430,569	$ 18,584,128	$ 20,204,060	$ 11,818,715	$ 12,307,412
Overtime	2,661,952	3,084,502	3,339,249	1,677,050	1,928,000
Group Insurance	4,934,803	4,782,486	5,157,587	3,130,829	3,604,456
FICA	1,468,436	1,588,848	1,717,159	1,032,769	1,090,173
Pension (Defined Benefit)	1,725,035	1,971,259	2,208,593	1,104,144	1,207,099
Pension (401A Cont./Match)	1,628,790	1,837,539	2,056,343	1,474,268	1,630,934
Workers Compensation	448,409	441,444	434,018	256,743	268,156
OPEB Contribution	375,531	492,354	523,621	298,078	303,807
Miscellaneous	26,238	52,841	66,243	56,144	68,553
subtotal	*$ 30,699,763*	*$ 32,835,401*	*$ 35,706,872*	*$ 20,848,740*	*$ 22,408,590*
Maintenance & Operations:					
Professional Services	$ 114,089	$ 160,634	$ 512,404	$ 159,390	$ 170,547
Fuel/Repair & Maint. (Vehicles)	1,058,162	1,356,576	1,142,619	949,500	957,000
Employee Travel	130,864	140,157	172,319	124,874	125,966
Employee Training	110,995	130,601	136,042	136,264	144,519
Maint. Contracts/IT Services	1,666,817	1,782,800	2,386,984	4,354,676	3,276,186
General Supplies	298,799	344,734	436,094	270,600	264,896
Uniforms	259,827	331,950	392,069	214,640	159,500
Tesla Supercharger (electricity usage)	-	-	-	-	60,000
Miscellaneous	338,883	447,802	425,854	313,443	315,175
subtotal	*$ 3,978,436*	*$ 4,695,254*	*$ 5,604,385*	*$ 6,523,387*	*$ 5,473,789*
Capital/Leases:					
Capital/Other	$ -	$ 200,444	$ 124,507	$ 68,679	$ 103,000
Fleet/Equipment Lease(s)	659,852	779,059	779,059	154,815	154,815
subtotal	*$ 659,852*	*$ 979,503*	*$ 903,566*	*$ 223,494*	*$ 257,815*
TOTAL	**$ 35,338,050**	**$ 38,510,158**	**$ 42,214,823**	**$ 27,595,621**	**$ 28,140,194**

Notes:

* The Public Safety Department (Police and Fire Services) was reorganized into separate Police and Fire Departments starting with FY 2026. The financial activity above represents police and fire service costs through FY 2025, with Police only service costs thereafter.

Budget Narrative

The FY 2027 Budget for Police totals $28.1 million and represents an increase of 2%, or $544,573, compared to FY 2026.

Prior to FY 2026, the police and fire functions were housed under one Public Safety department. During FY 2026, the functions were split into separate Police and Fire Departments which are intended to benefit our public through a focused management and service delivery model. The adopted budget for FY 2026 included funding for the Public Safety Department. A mid-year budget amendment was processed during FY 2026 that separated the functions into their own departments. Some expenses remained in the Police Department budget in FY 2026 as the underlying line-items could not be separated. These line-items have been separated for FY 2027 which will create one-year variances between the Police and Fire budgets (e.g. IT Professional Services, etc.) but will stabilize moving forward.

The Personnel Services category increased 7%, or $1.6 million, due to multiple factors including:

- 3% performance-based merit program scheduled for July 1, 2026.
- Increases in overtime reflect current usage trends as well as market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., minor impacts associated with position reclassifications during FYs 2025/2026, and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).
- Annualized cost impact of Jail operations as FY 2026 reflected 8-months of operations while FY 2027 represents the 1st full year of operations ($725,450 impact in personnel cost growth for FY 2027 inclusive of personnel reorganizations).
- Annualized cost impact from multiple personnel reorganizations including:
    - Reorganization of the Public Safety System Administrator from the Police Department into the Information Technology Department during FY 2026 (effective February 2026). Specifically, FY 2026 included position funding within the Police Department for 7 months (July 2025 – January 2026).
    - Reorganization of the Administrative Generalist from the Police Department into the Fire Department for FY 2027. This position will aid the Fire Department in its administrative service needs (payroll, budget, purchasing, invoice processing, etc.).
    - Elimination of the Public Safety Director position as part of the departmental reorganization (the Police and Fire Departments are now managed through a traditional Police and Fire Chief command structure). Funding for this position was removed in FY 2026 so there is no cost impact, just included herein to highlight the personnel changes between FYs 2026-2027.

Authorized personnel total 148.5 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Sworn Police Officers						
Captain	4.0	5.0	4.0	5.0	5.0	-
Crime Scene Detective***	1.0	1.0	1.0	1.0	-	(1.0)
Deputy Police Chief*	-	-	-	-	1.0	1.0
Director*	1.0	1.0	1.0	1.0	-	(1.0)
Lieutenant	7.0	7.0	7.0	7.0	7.0	-
Officer (I-III; inc. Field Training Officer)***	81.0	80.0	80.0	79.5	80.5	1.0
Police Chief*	-	-	-	-	1.0	1.0
Police Operations Major*	1.0	1.0	1.0	1.0	-	(1.0)
Police Support Operations Major*	1.0	1.0	1.0	1.0	-	(1.0)
Police Training Coordinator	1.0	1.0	1.0	1.0	1.0	-
Sergeant	16.0	17.0	17.0	17.0	17.0	-
	113.0	114.0	113.0	113.5	112.5	(1.0)
Alpharetta Jail						
Lieutenant	-	-	-	-	1.0	1.0
Deputy Division Chief (Detention)**	-	-	-	1.0	-	(1.0)
Detention Officer**	-	-	-	8.0	9.0	1.0
Detention Supervisor**	-	-	-	5.0	5.0	-
Division Chief (Detention)**	-	-	-	1.0	-	(1.0)
	-	-	-	15.0	15.0	-
Civilian Positions						
Administrative Assistant II	1.0	1.0	1.0	2.0	2.0	-
Administrative Generalist	1.0	1.0	1.0	1.0	-	(1.0)
Accreditation Manager	1.0	1.0	-	-	-	-
Criminal Information Systems Technician	-	1.0	1.0	1.0	1.0	-
Criminal Intelligence Analyst	1.0	1.0	1.0	1.0	1.0	-
Evidence Custodian	1.0	1.0	1.0	1.0	1.0	-
Evidence Technician	1.0	1.0	1.0	1.0	1.0	-
Fingerprint Technician	0.5	-	-	-	-	-
Parking Ambassador (2PT to 1FT in FY 2023)	1.0	1.0	1.0	1.0	1.0	-
Public Safety Budget/Finance Coordinator	1.0	1.0	1.0	1.0	1.0	-
Public Safety Records Clerk	5.0	4.5	4.5	4.0	4.0	-
Public Safety Records Manager	1.0	1.0	1.0	1.0	1.0	-
Public Safety Technology Manager	-	-	1.0	-	-	-
Records Management System Coordinator/Database Manager	-	1.0	1.0	1.0	1.0	-
Real Time Information Center Operator/Analyst	-	2.0	2.0	2.0	2.0	-
School Crossing Guard (8PT)	4.0	4.0	4.0	4.0	4.0	-
Special Projects and Data Analyst****	1.0	1.0	1.0	1.0	-	(1.0)
Strategic Communications & Media Relations Manager	-	-	1.0	1.0	1.0	-
	19.5	22.5	23.5	23.0	21.0	(2.0)
	132.5	**136.5**	**136.5**	**151.5**	**148.5**	**(3.0)**

* Position adjustments occurred during FY 2026. The Director position was eliminated during FY 2026 as part of the reorganization of the Public Safety Department into the Police and Fire Departments.

** Positions added as part of the FY 2026 Budget Adjustment to provide funding for reopening of the Alpharetta Jail that was previously operated by the Fulton County Sheriff.

*** The Crime Scene Detective position was reclassified to a Police Officer position during FY 2026.

**** The Special Projects and Data Analyst position was transferred to the IT Department during FY 2026 (new position classification is a Public Safety System Administrator).

As previously noted, budgetary comparisons between FY 2026 and 2027 will be skewed due to the departmental split into separate Police and Fire Departments that occurred during FY 2026. That said, combined Maintenance and Operations funding (Police and Fire) declined -4%, or -$290,183, between Fiscal Years 2026 and 2027 and is primarily related to reductions in estimated software maintenance fees for Hexagon (the FY 2026 Budget included year-2 software maintenance fees; however, with the revised go-live estimate for Fall 2026, year-2 software maintenance fees will not be needed until FY 2028) which are partially offset through various contractual growth items (e.g. TASER agreement), citywide technology infrastructure costs, Tesla Supercharger energy usage (revenue component more than covers this expense), etc.

The Police Department's Maintenance and Operations category decreased -16%, or -$1 million, due primarily to the following activity:

- Decrease in maintenance contracts/IT professional services of -$1.1 million (-25% reduction). As previously highlighted, not all budget line-items were apportioned as part of the mid-year budget amendment that was processed during FY 2026 to separate the functions into their own departments. Some expenses remained in the Police Department budget in FY 2026 as the underlying line-items could not be separated. These line-items have been separated for FY 2027 which will create one-year variances between the Police and Fire budgets (e.g. IT Professional Services, etc.) but will stabilize moving forward.

  The primary driver of the -$1.1 million decrease noted above is due to:

  - IT Professional Services that are now included within the Fire Department budget for FY 2027 (-$586,092 reduction in the Police Department budget).
  - North Fulton Regional Radio System Authority costs for Fire radios that are now included within the Fire Department for FY 2027 (-$239,716 reduction in the Police Department budget).
  - Partial reduction in estimated software maintenance fees for Hexagon (the FY 2026 Budget included year-2 software maintenance fees; however, with the revised go-live estimate for Fall 2026, year-2 software maintenance fees will not be needed until FY 2028). This action results in a funding reduction of -$372,940 in FY 2027 (includes removal of $136,569 in Milton pass-through funding and $232,940 in Alpharetta hexagon software funding). This maintenance funding will be reprogrammed into the FY 2028 Budget.
  - General growth in citywide technology infrastructure costs (e.g. Microsoft Enterprise licensing costs including Copilot AI, etc.), coverage of general software inflationary cost growth including cyber security software, etc.
  - Which is partially offset through increases in maintenance costs including

TASER contract costs ($61,383 growth; inclusive of new equipment).

- Addition of $60,000 in electric utility expenses associated with Tesla Superchargers. Conservatively, we are estimating service fee revenue in an amount totaling $100,000. FY 2027 will be our 1st full year of operations, and the FY 2028 budget will reflect a more accurate operational picture of the Supercharger financial impact as we will have actual usage trends to guide our budgeting forecasts.
- All other departmental maintenance and operations accounts decreased -$31,108, or -1%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

The Capital/Lease category increased 15%, or $34,321.

- The operational capital requests for FY 2027 include the following:
  - Replacement AEDs ($25,000).
  - Replacement Stalker Lasers ($15,000).
  - Replacement LiveScan equipment for digital fingerprinting ($53,000).
  - Replacement tools/equipment ($10,000).
- The equipment lease line item reflects the Police Department's allocable costs (68.5% usage allocation) under the 2021 Motorola portable radio lease.

National Incident Based Reporting System

Patrol Division

Offenses	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025
Group A Offenses	1,564	1,732	1,055	1,851	1,808
Group B Offenses	297	580	N/A	N/A	N/A
Total	1,861	2,312	1,055	1,851	1,808
Per 1000 Population	26.9	34.7	15.7	27.5	26.9
Arrest					
Group A Offenses	330	370	424	324	417
Group B Offenses	280	419	382	252	256
Non-Criminal Offenses	401	479	N/A	N/A	N/A
Total	1,011	1,268	806	576	673
Per 1000 Population	14.6	19.0	12.0	8.6	10.0

Criminal Investigations Division

Assigned for Investigation	1,374	816	716	752	812
Closed by Arrest	91	96	51	78	124
Closed by Exception	29	30	22	9	458
Unfounded	166	88	73	0	105
Active Cases	1,088	602	570	665	125

Traffic Division

Accidents	1,800	2,263	2,171	2,033	2,165
Fatalities	3	0	0	3	3

911 Communications

(911 Only) Calls For Service	35,866	40,657	42,097	44,034	39,810
Calls Received	77,909	78,603	79,667	73,819	73,209

Performance Measurement

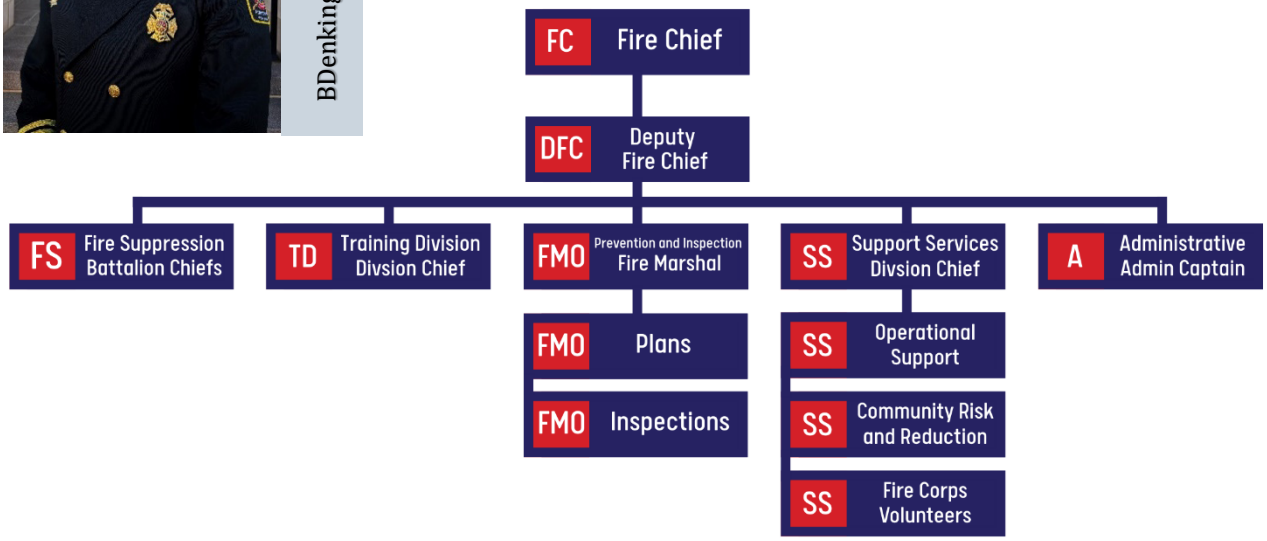
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Fire

BRAD DENKINGER
FIRE CHIEF



BDenkinger@alpharetta.ga.us



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Fostering strong sense of community including safety and security.

Providing a business climate that attracts the top echelon companies.

Our Community Vision serves as the guiding principles for the planning and operation of our city government and each department structures its mission, goals, and objectives to facilitate achievement of our mission. The icons set forth above are used throughout the Budget Narrative to identify the link between the city's Community Vision and the goals and objectives of our various departmental divisions/projects.

Fire

Administration, Fire, and Fire Marshall

Mission Statement

Public Safety: It is the **Mission** of the **Alpharetta Fire Department** to **Enhance** the **Quality** of **Life** of those that **Live**, **Work**, and **Play** in the **City of Alpharetta**.

The Alpharetta Fire Department is a proactive, customer-oriented emergency services provider. Our objective is to provide the best possible fire and emergency medical services. Our goal is to maximize the saving of lives, minimize the loss of property and avoid loss whenever possible through prevention and education.

The Fire Division responds to fires, accidents, and medical emergencies to protect life and property; participates in fire inspections, fire prevention activities, station maintenance, and training activities; and performs related work as required. All Firefighters are either EMT or paramedic certified.

Our professional Firefighters, EMTs, and Paramedics are united by their concern for those who live, work, and play in Alpharetta and are connected through our core values:

Courageous Spirit
The risks of your job are real. Persevere in the face of adversity.

Selfless Service
Put the welfare of the public and your team above your own. Add value to others.

Excellence With Integrity
Do what is right and do it well.

Divisions

All members of the Alpharetta Fire Department are, first and foremost, firefighters trained and certified as EMTs or Paramedics. Many also receive advanced training and certifications and serve on one of our specialty teams in addition to being part of one of our two primary divisions, suppression and prevention.

- Suppression
- Prevention
- Education And Risk Reduction
- Hazardous Materials
- Technical Rescue
- Special Events
- Tactical Emergency Response (T.E.R.S.)
- Boat Rescue

Goals and Objectives

- ✓ Maintain a minimum on-duty staffing level of not less than 24 Firefighter/AEMT and/or Firefighter/Paramedics at all times.
- ✓ Assure all firefighters are certified at the National Professional Qualifications Firefighter II Level.
- ✓ Maintain a minimum of 240 hours of annual training and career development for each career firefighter.
- ✓ Place the first fire apparatus on the scene of an emergency within five minutes of dispatch at least 90% of the time.
- ✓ Place a minimum of 14 firefighters on the scene of a structure fire within seven minutes of dispatch at least 90% of the time.
- ✓ Place an advance life support paramedic on the scene of a medical emergency within five minutes of dispatch at least 90% of the time.
- ✓ Present fire safety education programs to 80% of all preschool students and 95% of all first and fourth grade students who live in the City of Alpharetta.
- ✓ Conduct a fire safety inspection and/or design a pre-fire plan for every non-residential occupancy at least every two years.



MY WATCH ALPHARETTA

As emerging changes in healthcare affect our community on an almost daily basis, the Fire Department expanded our response to these needs with our community paramedicine program – My Watch Alpharetta.

The concept of community paramedicine represents one of the most progressive and historically based evolutions available to community-based healthcare and to the Emergency Medical Services arena. By utilizing Emergency Medical Service (EMS) providers in an expanded role, community paramedicine increases patient access to primary and preventative care, provides wellness interventions within the medical home model, decreases emergency department utilization, saves healthcare dollars, and improves patient outcomes.

Statement of Revenues and Expenditures

Fire*

General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES	*See Police schedule for historical financial activity.*				
Licenses and Permits				$ 40,000	$ 75,000
Charges for Services:					
Plan Review				175,000	200,000
Other				16,500	14,500
Other Revenue				-	-
TOTAL				**$ 231,500**	**$ 289,500**
EXPENDITURES					
Personnel Services:					
Salaries				$ 9,817,191	$ 10,190,741
Overtime				1,135,232	1,426,000
Group Insurance				2,846,656	3,062,927
FICA				840,601	889,226
Pension (Defined Benefit)				1,280,296	1,266,077
Pension (401A Cont./Match)				1,032,660	1,237,262
Workers Compensation				218,273	221,069
OPEB Contribution				241,867	254,687
Miscellaneous				39,119	39,527
subtotal				*$ 17,451,895*	*$ 18,587,516*
Maintenance & Operations:					
Professional Services				$ 440,150	$ 443,675
Fuel/Repair & Maint. (Vehicles)				246,000	280,000
Employee Travel				34,800	42,554
Employee Training				80,400	81,524
Maint. Contracts/IT Services				322,401	959,213
General Supplies				139,800	176,050
Uniforms				269,200	295,800
Miscellaneous				193,650	207,000
subtotal				*$ 1,726,401*	*$ 2,485,816*
Capital/Leases:					
Capital/Other				$ 214,000	$ 150,000
Fleet/Equipment Lease(s)				850,301	836,313
subtotal				*$ 1,064,301*	*$ 986,313*
TOTAL				**$ 20,242,597**	**$ 22,059,645**

Notes:

* The Public Safety Department (Police and Fire Services) was reorganized into separate Police and Fire Departments starting with FY 2026. The financial activity for Fire services prior to FY 2026 can be found within the "Police" schedule.

Budget Narrative

The FY 2027 Budget for Fire totals $22.1 million and represents an increase of 9%, or $1.8 million, compared to FY 2026.

Prior to FY 2026, the police and fire functions were housed under one Public Safety department. During FY 2026, the functions were split into separate Police and Fire Departments which are intended to benefit our public through a focused management and service delivery model. The adopted budget for FY 2026 included funding for the Public Safety Department. A mid-year budget amendment was processed during FY 2026 that separated the functions into their own departments. Some expenses remained in the Police Department budget in FY 2026 as the underlying line-items could not be separated. These line-items have been separated for FY 2027 which will create one-year variances between the Police and Fire budgets (e.g. IT Professional Services, etc.) but will stabilize moving forward.

The Personnel Services category increased 7%, or $1.1 million, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (3%, where applicable), scheduled for July 1, 2026.
- Increases in overtime reflect current usage trends as well as market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., minor impacts associated with position reclassifications during FYs 2025/2026, and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).
- Annualized cost impact from the reorganization of the Administrative Generalist from the Police Department into the Fire Department for FY 2027. This position will aid the Fire Department in its administrative service needs (payroll, budget, purchasing, invoice processing, etc.).





Authorized personnel total 110 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Certified Firefighters						
Assistant Fire Marshal	4.0	5.0	4.0	4.0	4.0	-
Battalion Chief	3.0	3.0	3.0	3.0	3.0	-
Captain	18.0	18.0	18.0	18.0	18.0	-
Community Paramedic	1.0	1.0	1.0	1.0	-	(1.0)
Community Risk Reduction Officer	-	-	-	-	1.0	1.0
Deputy Fire Marshal	2.0	1.0	2.0	2.0	2.0	-
Division Chief of Support Services**	-	-	-	-	1.0	1.0
EMS Division Chief**	1.0	1.0	1.0	1.0	-	(1.0)
EMS Training Officer	1.0	1.0	1.0	1.0	1.0	-
Fire Administration Chief**	-	1.0	1.0	1.0	-	(1.0)
Fire Administrative Captain	-	1.0	1.0	1.0	1.0	-
Fire Apparatus Engineer	27.0	27.0	27.0	27.0	27.0	-
Fire Chief**	-	-	-	-	1.0	1.0
Fire Deputy Chief**	-	-	-	-	1.0	1.0
Fire Division Chief Training	1.0	1.0	1.0	1.0	1.0	-
Fire Marshal	1.0	1.0	1.0	1.0	1.0	-
Fire Operations Chief**	1.0	1.0	1.0	1.0	-	(1.0)
Firefighter (I-III)*	19.0	18.0	18.0	22.0	26.0	4.0
Firefighter/Paramedic*	20.0	20.0	20.0	16.0	12.0	(4.0)
Lieutenant	6.0	6.0	6.0	7.0	7.0	-
Public Safety Logistics/Emer. Mgmt. Coord.**	1.0	1.0	1.0	1.0	-	(1.0)
Support Services Office/EMC**	-	-	-	-	1.0	1.0
	106.0	107.0	107.0	108.0	108.0	-
Civilian Positions						
Administrative Generalist	-	-	-	-	1.0	1.0
Fire Plans Examiner	-	-	-	1.0	1.0	-
	-	-	-	1.0	2.0	1.0
	106.0	**107.0**	**107.0**	**109.0**	**110.0**	**1.0**

* Relative changes in counts between the Firefighter classification and the Firefighter/Paramedic classification will occur based on candidate experience but will not exceed the combined authorized position counts.

** Position adjustments occurred during FY 2026.

As previously noted, budgetary comparisons between FY 2026 and 2027 will be skewed due to the departmental split into separate Police and Fire Departments that occurred during FY 2026. That said, combined Maintenance and Operations funding (Police and Fire) declined -4%, or -$290,183, between Fiscal Years 2026 and 2027 and is primarily related to reductions in estimated software maintenance fees for Hexagon (the FY 2026 Budget included year-2 software maintenance fees; however, with the revised go-live estimate for Fall 2026, year-2 software maintenance fees will not be needed until FY 2028) which are partially offset through various contractual growth items (e.g. TASER agreement), citywide technology infrastructure costs, Tesla Supercharger energy usage (revenue component more than covers this expense), etc.

The Fire Department's Maintenance and Operations category increased 44%, or $759,415, due primarily to the following activity:

- Increase in maintenance contracts/IT professional services of $636,812 (198% growth). As previously highlighted, not all budget line-items were apportioned as part of the mid-year budget amendment that was processed during FY 2026 to separate the functions into their own departments. Some expenses remained in the Police Department budget in FY 2026 as the underlying line-items could not be separated. These line-items have been separated for FY 2027 which will create one-year variances between the Police and Fire budgets (e.g. IT Professional Services, etc.) but will stabilize moving forward.
- Increase in uniform costs of $26,600 (10% growth) due to cost growth and ensuring full funding of all needed components including fire uniforms (station uniforms and footwear, duty gear, related components), etc.
- All other departmental maintenance and operations accounts increased $96,003 (8% growth) compared to FY 2026 and is more indicative of establishing a full-year operational baseline after the department separation (between police and fire) than true year-over-year cost growth.

The Capital/Lease category decreased -7%, or -$77,988.

- The operational capital requests for FY 2027 include the following:
  - Replacement Fire Hoses ($40,000).
  - Replacement SCBA Cylinders ($35,000).
  - Replacement HAZMAT equipment ($30,000).
  - Replacement tools/equipment ($20,000).
  - Replacement furniture/bedding ($15,000).
  - Replacement exercise equipment ($10,000)
- The equipment lease line item reflects the Fire Department's allocable costs (68.5% usage allocation) under the 2021 Motorola portable radio lease as well as multiple leases for fire apparatus, heart monitors, fire extrication equipment, etc.

Performance Measurement

The following section provides detailed information on Fire Department programs including performance measures.

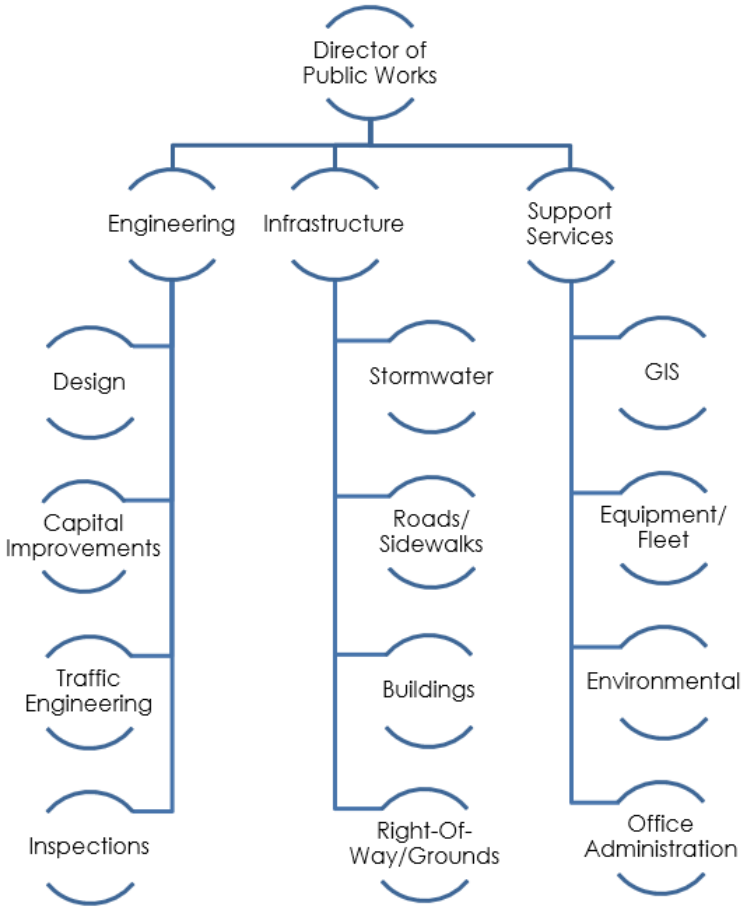
	2021 Total Incidents	2022 Total Incidents	2023 Total Incidents	2024 Total Incidents	2025 Total Incidents
FIRES					
Structure Fires	61	54	55	58	52
Vehicle Fires	22	24	22	23	15
Other Fires	35	44	23	49	51
Total Fires	**118**	**122**	**100**	**130**	**118**
Pressure Ruptures, Explosion, Overheat	**4**	**3**	**1**	**5**	**0**
RESCUE CALLS					
Emergency Medical	3,510	3,946	4,365	4,499	5,006
All Others	145	528	567	1,727	160
Total Rescue Calls	**3,655**	**4,474**	**4,932**	**6,226**	**5,166**
Hazardous Condition Calls	124	177	182	170	160
Service Calls	574	744	1,316	876	1,372
Good Intent Calls	1,466	1,411	1,524	21	1,793
Severe Weather or Natural	0	1	0	0	0
Special Incident Calls	0	2	0	39	26
Unknown Incident Type	0	0	0	4	10
FALSE CALLS					
Malicious Calls	13	7	19	19	13
Other False Calls	847	1,174	850	1,003	981
Total False Calls	**860**	**1,181**	**869**	**1,022**	**994**
TOTAL CALLS	**6,801**	**8,115**	**8,924**	**8,493**	**9,639**

Public Works

PETE SEWCZWICZ
DIRECTOR



PSewczwicz@alpharetta.ga.us



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Public Works

Administration, Public Works, and Conservation

Mission Statement

The Department of Public Works is committed to providing cost effective engineering, maintenance and design solutions through the highest possible professionalism which protects, preserves, and improves the City of Alpharetta's infrastructure. Our focus shall include facilities, traffic, streets, stormwater, and environmental conservation.

Goals and Objectives



✓ Improve and maintain the City of Alpharetta infrastructure at the highest possible level and to enhance and promote the quality of life.



✓ Provide engineering professionalism to ensure growth and progress for the City of Alpharetta.



✓ Provide consistent Public Works functions and operations that afford future excellence in growth and expansion for the City of Alpharetta.



✓ Improve intergovernmental relations.



✓ Provide more efficient support and response for the citizens of Alpharetta.



✓ Develop strategic, long-range plans for the future.



✓ Ensure timely completion of repairs on work projects so the disruption of service to the customer is minimal.

Statement of Revenues and Expenditures

Public Works
General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Other Revenue:					
CID (GA400 Interchange Maint.)	$ 97,928	$ 83,314	$ 85,348	$ 96,620	$ 95,900
Miscellaneous	5,841	3,753	10,024	3,000	4,000
TOTAL	**$ 103,769**	**$ 87,067**	**$ 95,372**	**$ 99,620**	**$ 99,900**
EXPENDITURES					
Personnel Services:					
Salaries	$ 3,358,554	$ 3,528,932	$ 3,651,520	$ 3,942,353	$ 4,143,978
Overtime	52,018	40,004	33,547	50,000	42,000
Group Insurance	875,935	833,181	842,243	1,046,822	1,199,489
FICA	251,367	263,813	272,609	305,486	321,008
Pension (Defined Benefit)	296,195	333,160	380,255	428,077	489,254
Pension (401A Cont./Match)	281,588	316,395	320,891	411,389	436,013
Workers Compensation	91,661	83,243	81,252	88,265	88,693
OPEB Contribution	73,455	92,962	98,043	97,209	102,180
Miscellaneous	1,625	771	1,927	929	10,205
subtotal	*$ 5,282,398*	*$ 5,492,461*	*$ 5,682,286*	*$ 6,370,530*	*$ 6,832,820*
Maintenance & Operations:					
Professional Services	$ -	$ 27,934	$ 6,411	$ 10,000	$ 8,000
Fuel/Repair & Maint. (Vehicles)	170,762	177,438	177,644	190,000	190,000
Repair & Maint. (Facilities)	454,356	465,674	704,409	515,000	515,000
Maint. Contracts/IT Services	1,448,843	1,489,757	1,590,974	1,795,530	1,923,590
General Supplies	105,228	115,266	139,246	152,550	148,750
Utilities	1,883,930	2,133,490	2,307,959	2,275,850	2,393,150
Miscellaneous	110,290	127,286	169,792	173,600	173,100
subtotal	*$ 4,173,408*	*$ 4,536,844*	*$ 5,096,434*	*$ 5,112,530*	*$ 5,351,590*
Capital/Lease/Other					
City Hall HVAC	$ -	$ 128,355	$ -	$ -	$ -
subtotal	*$ -*	*$ 128,355*	*$ -*	*$ -*	*$ -*
TOTAL	**$ 9,455,806**	**$ 10,157,660**	**$ 10,778,721**	**$ 11,483,060**	**$ 12,184,410**

Budget Narrative

The FY 2027 Budget for Public Works totals $12.2 million and represents an increase of 6%, or $701,350, compared to FY 2026.

The Personnel Services category increased 7%, or $462,290, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., changes in staff benefit options (e.g. employee-only vs family coverage, etc.), and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).

Authorized personnel total 50 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Assistant Construction Manager	1.0	1.0	1.0	1.0	1.0	-
Civil Engineer	1.0	1.0	1.0	1.0	1.0	-
Construction Manager	1.0	1.0	1.0	1.0	1.0	-
Director	1.0	1.0	1.0	1.0	1.0	-
Engineering Technician	6.0	6.0	4.0	4.0	4.0	-
Environmental Program Coordinator	1.0	1.0	1.0	1.0	1.0	-
Fleet & Logistics Equipment Coordinator	1.0	1.0	1.0	1.0	1.0	-
GIS Coordinator	1.0	1.0	1.0	1.0	1.0	-
Infrastructure Operations Manager	1.0	1.0	1.0	1.0	1.0	-
Intelligent Transportation System (ITS) Program Manager	-	-	1.0	1.0	1.0	-
Office Manager	1.0	1.0	1.0	1.0	1.0	-
Public Works Crew Leader	7.0	7.0	7.0	7.0	7.0	-
Public Works Project Administrator	1.0	1.0	1.0	1.0	1.0	-
Public Works Supervisor	3.0	3.0	3.0	3.0	3.0	-
Public Works Technician I*	6.0	5.0	5.0	5.0	4.0	(1.0)
Public Works Technician II	9.0	9.0	9.0	9.0	9.0	-
Right of Way Coordinator	1.0	1.0	1.0	-	-	-
Senior Engineer	2.0	1.0	1.0	1.0	1.0	-
Senior Engineering Technician*	-	1.0	1.0	1.0	2.0	1.0
Senior Inspector	1.0	1.0	1.0	1.0	1.0	-
Senior Operations Manager	1.0	1.0	1.0	1.0	1.0	-
Senior Water Resources Analyst	1.0	1.0	1.0	1.0	1.0	-
Support Services Manager	1.0	1.0	1.0	1.0	1.0	-
Traffic Operations Manager	1.0	1.0	1.0	1.0	1.0	-
Traffic Safety Specialist	-	-	1.0	1.0	1.0	-
Transportation Engineering Manager	1.0	1.0	1.0	1.0	1.0	-
Urban Forestry & Landscape Specialist	-	-	-	1.0	1.0	-
Urban Forestry Program Manager	1.0	1.0	1.0	1.0	1.0	-
	51.0	50.0	50.0	50.0	50.0	-

* Position adjustments occurred during FY 2026.

The Maintenance and Operations category increased 5%, or $239,060, due primarily to the following activity:

- Increase in maintenance contracts/IT professional services of $128,060 (7% growth) due primarily to anticipated landscape (ROW) maintenance cost growth (current contract expires in January 2027, new projects such as Webb Bridge Road streetscape come online in sections, etc.), growth in citywide technology infrastructure costs (e.g. Microsoft Enterprise licensing costs including Copilot AI, etc.), coverage of general software inflationary cost growth including cyber security software, etc.
- Increase in utility expenses of $117,300 (5% growth) in electricity, natural gas, water/sewer, and miscellaneous utilities (e.g., cable and garbage). The main driver is electric utility cost growth and is based on usage trends. GA Power base rates are frozen through 2028, but rate payers are still subject to adjustments in fuel costs, storm recovery costs, etc. Additionally, streetlight additions through City projects (e.g. Webb Bridge Road streetscape, etc.) will drive cost growth.
- All other departmental maintenance and operations accounts decreased -$6,300, or -1%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

Performance Measurement

The following section provides detailed information on Public Works programs including performance measures.

- **Engineering**

  Statement of Service: Engineering administration provides for the administration and technical review of public and private improvements in the City of Alpharetta by managing all projects skillfully, efficiently, and professionally.

Public Works Engineering					
Performance Measurements	**Actual FY 2023**	**Actual FY 2024**	**Actual FY 2025**	**Target FY 2026**	**Target FY 2027**
# of Water quality samples analyzed	252	227	194	227	225



Alpharetta residents can recycle their glass at the drop-off center located in the parking lot of the Department of Public Works (1790 Hembree Road). The facility recycles most types of glass and sells their product to Georgia companies that manufacture consumer products like fiberglass insulation and flooring. The new Alpharetta glass recycling site is available to Alpharetta residents 24 hours a day, 7 days a week.

- **Public Works**

  Statement of Service: Public works coordinates and performs maintenance on streets, sidewalks, traffic signals, traffic signs, and city facilities. Public Works also provides construction services in support of the engineering division and other city departments.

Public Works Public Works Operations					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Average # of days to complete sidewalk work order	7.4	18.5	11.3	10.0	12.0
Average # of days to complete pothole work order	1.1	1.0	1.0	1.0	1.0
Average # of days to complete curb and gutter work order	23.0	3.0	2.0	5.0	5.0
Average # of days to complete ROW., mowing, limb work order	1.0	1.0	1.0	2.0	1.0
Average # of days to complete sink hole work order	4.7	9.6	6.5	4.0	8.0
Average # of days to complete sign replacement/upgrade work order	1.3	1.1	1.1	1.5	1.5
Average # of days to complete signal light maintenance work order	5.5	6.0	9.1	5.0	7.0
Average # of days to complete striping work order	6.3	2.5	8.4	4.0	7.0
Average # of days to complete catch basin work order	1.5	1.9	1.6	2.5	2.0
Average # of days to complete storm drain work order	12.7	6.5	1.6	10.0	7.0
Average # of days to complete facilities work order	3.8	4.7	3.1	4.0	4.0

- **Conservation**

  Statement of Service: Conservation provides education and community activism strategies to address environmental and aesthetic issues in the City of Alpharetta, through clean-up campaigns, seminars, literature, and other beautification efforts.

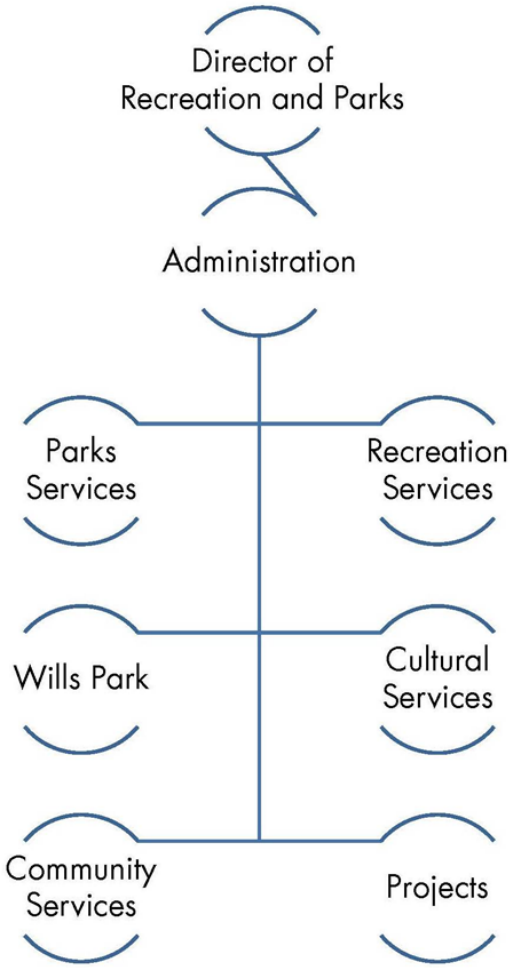
Public Works Conservation					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Events coordinated	18	17	12	18	16
# of Students reached	354	205	267	275	275
# of Volunteers	269	394	319	250	300

Recreation, Parks & Cultural Services

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DIRECTOR



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Recreation, Parks & Cultural Services

Administration, Parks Services, Recreation Services, Wills Park, Cultural Services, Community Services, Projects

Mission Statement

The Alpharetta Recreation, Parks & Cultural Services Department strives to provide the highest quality recreation activities, cultural programs, and park facilities to our citizens, consistent with our core values of Excellence, Stewardship, Integrity, Service, and Loyalty.

Goals and Objectives

- ✓ Continue to work towards completion of the nine (9) Park improvement/Development projects prioritized by the 2021 Parks Bond Referendum.
- ✓ Connect with residents and seek out ideas for new programs and services and implement them when possible; and
- ✓ Increase revenues through increased participation, sponsorships, and donations.
- ✓ Actively engage in improving access and usability of all parks and facilities through ongoing maintenance, beautification, and facility enhancement; and
- ✓ Expand existing and seek out new partnerships with adjoining cities, Fulton County, Fulton County Schools, and businesses throughout the City.



Statement of Revenues and Expenditures

Recreation, Parks & Cultural Services

General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Intergovernmental	$ 2,260	$ -	$ -	$ 2,000	$ 2,000
Charges for Services:					
Aquatics Activity Fees	168,968	216,910	184,497	236,500	215,000
Athletics Activity Fees	254,103	184,620	189,414	205,000	210,000
Arts Services	206,466	238,296	260,359	242,500	291,000
Community Theater	-	-	6,794	27,000	9,000
Community Center Activity Fees	977,584	1,135,953	1,248,561	1,315,000	1,367,500
Preston Ridge Community Center Activity Fees	12,035	5,641	13,260	75,000	40,000
Senior Center Activity Fees	143,660	151,091	162,093	195,500	180,300
Equestrian Center Activity Fees	223,756	449,931	501,919	440,000	440,000
Wills Park Rec. Ctr Activity Fees	286,457	176,230	191,952	221,000	220,000
Community Garden Fees	-	21,595	25,233	20,605	25,000
Non-Resident Fees	454,528	345,538	445,368	460,000	475,000
Taste of Alpharetta	-	252,457	245,256	250,000	250,000
Other	75,184	152,268	191,728	205,025	197,000
Other Revenue	21,105	35,760	22,134	40,070	25,000
TOTAL	**$ 2,826,105**	**$ 3,366,291**	**$ 3,688,568**	**$ 3,935,200**	**$ 3,946,800**
EXPENDITURES					
Personnel Services:					
Salaries	$ 2,901,771	$ 3,237,361	$ 3,453,078	$ 3,510,274	$ 3,658,837
Seasonal/Temp. Svcs	859,192	953,572	1,068,089	1,118,000	1,206,000
Overtime	203,086	212,347	232,953	214,750	263,000
Group Insurance	857,163	887,986	1,022,985	1,116,184	1,166,134
FICA	295,173	329,193	353,136	370,586	392,725
Pension (Defined Benefit)	206,704	253,603	263,691	264,250	248,680
Pension (401A Cont./Match)	276,714	332,431	373,590	440,911	484,385
Workers Compensation	74,161	75,303	72,331	78,648	78,398
OPEB Contribution	60,543	84,005	87,180	85,800	89,455
Miscellaneous	2,090	1,544	925	1,393	5,971
subtotal	*$ 5,736,597*	*$ 6,367,346*	*$ 6,927,958*	*$ 7,200,796*	*$ 7,593,585*
Maintenance & Operations:					
Professional Services	$ 1,919,243	$ 2,196,414	$ 2,414,421	$ 2,435,190	$ 2,395,560
Fuel/Repair & Maint. (Vehicles)	91,746	85,637	95,488	101,500	101,500
Repair & Maintenance (Grounds)	763,188	860,390	849,932	850,980	836,250
Repair & Maintenance (Facilities)	37,341	127,154	87,753	70,500	66,600
Equipment Rental	136,201	172,130	189,319	270,893	246,000
Maintenance Contracts/IT Svcs.	1,761,847	1,878,586	2,195,999	2,279,793	2,352,168
General Supplies	420,637	508,589	548,886	519,230	522,265
Uniforms	21,096	23,314	19,681	22,300	18,400
Utilities	728,330	842,933	918,572	865,300	870,000
Miscellaneous	294,258	320,411	282,129	271,600	247,750
subtotal	*$ 6,173,885*	*$ 7,015,558*	*$ 7,602,180*	*$ 7,687,286*	*$ 7,656,493*
Capital/Other	$ 15,188	$ 41,283	$ 35,853	$ 29,000	$ 30,000
TOTAL	**$ 11,925,670**	**$ 13,424,187**	**$ 14,565,991**	**$ 14,917,082**	**$ 15,280,078**

Budget Narrative

The FY 2027 Budget for Recreation, Parks & Cultural Services totals $15.3 million and represents an increase of 2%, or $362,996, compared to FY 2026.

The Personnel Services category increased 5%, or $392,789, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Increases in seasonal services funding reflect current usage trends.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., changes in staff benefit options (e.g. employee-only vs family coverage, etc.), and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).

Authorized personnel total 49.5 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Administrative Assistant I	3.0	3.0	3.0	3.0	3.0	-
Administrative Assistant II	1.0	1.0	1.0	1.0	1.0	-
Administrative Office Coordinator	1.0	1.0	1.0	1.0	1.0	-
Community Agricultural Coordinator	0.5	0.5	0.5	0.5	0.5	-
Community Services Manager	1.0	1.0	1.0	1.0	1.0	-
Cultural Arts Coordinator	1.0	1.0	1.0	1.0	1.0	-
Cultural Services Coordinator	1.0	1.0	1.0	1.0	1.0	-
Cultural Services Manager	1.0	1.0	1.0	1.0	1.0	-
Cultural Services Supervisor	2.0	2.0	2.0	2.0	2.0	-
Director	1.0	1.0	1.0	1.0	1.0	-
Equestrian Center Supervisor II	-	-	1.0	1.0	1.0	-
Marketing Coordinator	0.5	-	-	-	-	-
Operations Manager*	-	-	1.0	1.0	-	(1.0)
Senior Operations Manager*	-	-	-	-	1.0	1.0
Parks Maintenance Crew Leader	5.0	5.0	4.0	4.0	4.0	-
Parks Maintenance Worker*	13.0	13.0	13.0	13.0	12.0	(1.0)
Parks Services Manager	1.0	1.0	1.0	1.0	1.0	-
Parks Supervisor II*	3.0	4.0	4.0	4.0	4.0	-
Parks and Projects Supervisor*	-	-	-	-	1.0	1.0
Project Manager	1.0	1.0	-	-	-	-
Recreation Coordinator	5.0	5.0	5.0	5.0	5.0	-
Recreation Services Manager	1.0	1.0	1.0	1.0	1.0	-
Recreation Supervisor II	4.0	4.0	4.0	4.0	4.0	-
Special Events Coordinator	1.0	1.0	1.0	1.0	1.0	-
Special Events Supervisor	1.0	1.0	1.0	1.0	1.0	-
Wills Park Manager	1.0	1.0	1.0	1.0	1.0	-
	49.0	49.5	49.5	49.5	49.5	-

* Position adjustments occurred during FY 2026.

The Maintenance and Operations category declined less than -1%, or -$30,793, due primarily to the following activity:

- Increase in maintenance contracts/IT professional services of $72,375 (3% growth) due to additional funding for shavings/manure removal (Equestrian Center), parks landscape and janitorial services, growth in RecWare Park Program Registration software costs (+$10,000 as it is funded on a per customer basis and grows along with program participation), growth in citywide technology infrastructure costs (e.g. Microsoft Enterprise licensing costs including Copilot AI, etc.), coverage of general software inflationary cost growth including cyber security software, etc.
- Increase in utility expenses of $4,700 (1% growth) in electricity, natural gas, water/sewer, and miscellaneous utilities (e.g., cable and garbage). The main driver is electric utility cost growth and is based on usage trends. GA Power base rates are frozen through 2028, but rate payers are still subject to adjustments in fuel costs, storm recovery costs, etc. The park system is converting a large portion of its lighting inventory into LED fixtures (North Park) during FY 2026, and the FY 2027 budget reflects anticipated energy savings (hence the modest growth in overall utility expenses).
- All other departmental maintenance and operations accounts decreased -$107,868, or -2%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

The Capital/Other category includes funding for general repair/replacement capital and equipment needs.

Performance Measurement

The following section provides detailed information on Recreation and Parks programs including performance measures.

- **Administration**

  Statement of Service: The administrative arm of the Recreation & Parks Department provides short/long-term capital projects planning, oversees the effective distribution of the department's resources, and provides professional guidance to each division.

Recreation, Parks & Cultural Services - Rec Admin					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Recreation & Parks turnover percentage	4%	4%	8%	8%	8%
Annual Activity Enrollments as in ActiveNet	24,609	27,151	27,500	27,500	27,500

- **Adult Activity Center**

  Statement of Service: To meet the needs of Alpharetta's adult and senior citizens through facilitating convenient, affordable, and accessible recreation activities and services.

Recreation, Parks & Cultural Services - Adult Activity					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Total # of Participants per year*	27,314	33,758	36,465	36,000	36,000
(Res / Non-Res)	8735/18,579	11,692/20,417	13463/23002	14,000/22,000	14,000/22,000
Total # of Building rentals	8	4	3	10	10
Total # of Day trips taken	100	96	88	100	90
Total # of Overnight trips taken using City buses	3	3	3	3	3

- **Aquatics**

  Statement of Service: Aquatics provides accessible and safe recreation opportunities through water-related training, events, and facilities.

Recreation, Parks & Cultural Services - Aquatics					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
% of Days pool facilities were open during pool season (93 days)	100%	100%	100%	100%	100%
Average daily attendance at City pool	340	300	300	300	300
Hours of lifeguard training per person	40	40	40	40	40
# of Swim lessons held	N/A	N/A	N/A	N/A	N/A
# of Swim lessons participants	N/A	N/A	N/A	N/A	N/A
(resident / non-resident)	N/A	N/A	N/A	N/A	N/A
Swim teams participants	223	211	235	240	240
(resident / non-resident)	149/74	138/73	149/86	150/90	150/90
C.O.A.S.T. participants	19	22	15	N/A	N/A
(resident / non-resident)	13/6	10/12	7/8	N/A	N/A
# of Pool passes sold	176	171	179	180	180
(resident / non-resident)	81/95	70/101	68/111	70/110	70/110

- **Cultural Arts**

  Statement of Service: Cultural Arts facilitates programs that educate and expose citizens and visitors to a rich and diverse range of cultural expressions, through both education and special events.

Recreation, Parks & Cultural Services - Cultural Arts					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Participants in youth art classes	345	427	392	470	480
(resident/Milton/non-resident)	225/120	301/126	262/130	320/120	345/135
# of Participants in adult art classes	661	711	759	750	785
(resident/Milton/non-resident)	430/181	449/262	512/247	480/280	500/285
# of Participants in summer camp	651	671	857	700	870
(resident/Milton/non-resident)	423/219	470/201	618/239	520/220	625/245

- **Health and Wellness**

  Statement of Service: Health & Wellness provides programs, services, and information to allow all residents to live a healthier lifestyle.

Recreation, Parks & Cultural Services - Health & Wellness					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Participants in aerobics	N/A	N/A	N/A	N/A	N/A
(resident / non-resident)	N/A	N/A	N/A	N/A	N/A
# of Participants in Yoga (Adults &	N/A	N/A	N/A	N/A	N/A
(resident / non-resident)	N/A	N/A	N/A	N/A	N/A
# of Participants in tennis	420	406	524	500	500
(resident / non-resident)	355/65	354/52	440/84	400/100	400/100
# of Participants in Walking/ Running Programs	204	148	N/A	100	100
(resident / non-resident)	91/113	72/76	N/A	75/25	75/25
# Participants in Babysitter Bootcamp Classes and Camps	23	104	49	55	55
(resident / non-resident)	18/5	57/47	30/20	30/25	30/25
# of Participants in Cooking Classes(remove "and Camps")	N/A	N/A	N/A	N/A	N/A
(resident / non-resident)	N/A	N/A	N/A	N/A	N/A
# of HW Pop-Up Participants	3500	3500	3500	3500	3500
# of Participants in Pickleball	534	593	336	450	450
(resident / non-resident)	295/239	313/280	186/150	350/100	350/100

- **Athletics**

  Statement of Service: Athletics provides accessible and safe recreation opportunities through athletic-related training and events.

Recreation, Parks & Cultural Services - Athletics					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Participants - Adult Basketball	468- 3 seasons; 60 teams	517-3 seasons; 67 teams	685	500	500
(resident / non-resident)	156/312	137/380	212/473	200/300	200/300
# of Participants - Adult Softball	1,419- 3 seasons; 133 teams	1864-129 teams	1231	1350	1350
(resident / non-resident)	436/983	425/922	435/796	450/900	450/900
# of Participants - Teen Basketball	N/A	N/A	N/A	50	50
(resident / non-resident)	N/A	N/A	N/A	35/15	35/15
# of Participants - Youth Basketball	358- 45 teams	322-39 teams	302	400	400
(resident / non-resident)	287/71	251/71	227/75	300/100	300/100
# of Participants - Youth Soccer	N/A	N/A	N/A	N/A	N/A
(resident / non-resident)	N/A	N/A	N/A	N/A	N/A
# of Participants - Youth Travel Soccer	N/A	N/A	N/A	N/A	N/A
(resident / non-resident)	N/A	N/A	N/A	N/A	N/A

- **Community Center**

  Statement of Service: The Alpharetta Community Center provides a convenient and safe environment for diverse recreational opportunities and services to meet the needs of all populations.

Recreation, Parks & Cultural Services - Community Center					
Performance Measurements	**Actual FY 2023**	**Actual FY 2024**	**Actual FY 2025**	**Target FY 2026**	**Target FY 2027**
# of Participants in summer day camps	1753	1,636	1,844	1,900	1,900
(resident / non-resident)	1,227/527	1172/499	1393/451	1400/500	1400/500
# of Participants in dance, including camps	979	760	671	700	700
(resident / non-resident)	703/276	495/265	438/233	450/250	450/250
# of Participants in gymnastics, including camps and AGA	5447	4,101	5,577	5,500	5,500
(resident / non-resident)	3,377/2,070	2585/1516	3,277/2,300	3500/2000	3500/2000
# of Participants in Specialty Camps	1,564	559	525	700	700
(resident / non-resident)	926/638	437/122	424/101	500/100	500/100

Recreation, Parks & Cultural Services - Preston Ridge					
Performance Measurements	**Actual FY 2023**	**Actual FY 2024**	**Actual FY 2025**	**Target FY 2026**	**Target FY 2027**
Total # of Active Adult Participants per year*	5,326	4,235	3,806	4,000	4,000
(resident / non-resident)	1,241/4,085	1354/2881	1602/2204	1200/2800	1200/2800
# of Facility Rentals	25	92	101	100	100

- **Equestrian Center**

  Statement of Service: The equestrian center provides an accessible and safe venue for hosting local and national equestrian events as well as other outdoor events.

Recreation, Parks & Cultural Services - Equestrian Center					
Performance Measurements	**Actual FY 2023**	**Actual FY 2024**	**Actual FY 2025**	**Target FY 2026**	**Target FY 2027**
Total # of Equestrian event dates	82	91	89	95	112
Total # dog show events	12	6	6	6	6
Total # other event dates hosted at equestrian center	13	9	8	7	7
Total attendance at events	100,000	100,000	120,000	120,000	120,000
# of Arenas/rings maintained	6	6	6	6	6
# of Part-time hours used	0	0	0	0	500

- **Community Services**

  Statement of Service: To enhance the quality of life and reputation of the city by providing special event opportunities for citizens and visitors of Alpharetta.

Recreation, Parks & Cultural Services - Community Services Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Number of Workshops/Classes Offered	61 (CY2023)	72	83	72	72
Number of local schools in partnership*	5	8**	8**	11	11
Number of individual volunteers participating in program	616 (CY2023)	1,266	1,173	1,200	750***
Number of volunteer hours dedicated from community volunteers to program	4,680 (CY2023)	4,027	3,192	3,200	1200***

* Cambridge High School, Alpharetta High School, Milton High School, Innovation Academy, Fulton Science Academy

** Cambridge High School, Alpharetta High School, Milton High School, Innovation Academy, Fulton Science Academy, Fulton Academy of Science & Technology, Summit Hill Elementary, Alpharetta Elementary

*** Expecting to be under construction in FY27, which would prevent or greatly reduce the volunteer opportunities.

Recreation, Parks & Cultural Services - Community Services Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Total Approved Events:					
Exclusive City Events	11	6	6	6	6
City Partnered Events	90	173	173	175	175
Outside Event Applications Processed	21	52	52	50	50
Approved / Denied	19 approved/2 cancelled	17 approved/35 denied	25 approved/26 denied	20 approved/20 denied	20 approved/20 denied
Film Permit Requests Processed	14	13	18	20	20
Approved / Denied	13 approved/ 1 cancelled	13 approved/0 denied	16 approved/2 denied	15 approved/0 denied	15 approved/0 denied
Estimated Attendance for:					
Taste of Alpharetta	40,000	30,000	29,000	30,000	30,000
Mayor's Challenge	1,500	1,500	1,750	2,000	2,000
Old Soldier's Day Parade	0	N/A	N/A	N/A	N/A
Season of Celebration	3,000	3,500	8,000	8,000	8,000
Alpharetta Arts StreetFest	10,000	20,000	20,000	20,000	20,000
Scarecrow Harvest	0	4,000	5,000	5,000	5,000
Wire & Wood	15,000	25,000	27,000	27,000	27,000
Food Trucks	5,000	12,000	10,000	10,000	10,000
Restless In Resthaven	0	N/A	N/A	N/A	N/A
Grilling & Gridiron	800	2,000	2,500	2,500	2,500
Volunteer Recruitment:					
Taste of Alpharetta (Non-City Staff)	0	3	7	3	0
Season of Celebration	8	6	8	6	6
Scarecrow Harvest	0	0	4	0	0
Wire & Wood	0	0	0	0	0
Community Agriculture	N/A	N/A	N/A	N/A	N/A

- **Parks Maintenance**

  Statement of Service: Parks maintenance provides for the development and maintenance of the city's parks, greenway space, recreation facility grounds, athletic fields, and other city owned property in order to aesthetically reflect community identity, enrich the quality of life, and provide accessible and safe open space for leisure time activities.

Recreation, Parks & Cultural Services - Parks Maintenance					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Athletic fields maintained*	35	38	35	35	35
# of Park acres maintained	360	363	363	363	363
# of Greenway acres maintained	254	254	254	254	254
# of Alpha Loop miles maintained		2	2	2	5
# of Playground inspections	120	126	120	114	120
# of Park/playground injuries	1	0	0	0	0
# of Athletic field preparations	5,500	6,320	5,300	6,300	6,300
# of Park mowings	40	40	40	40	40
# of Athletic field mowings	80	80	80	80	80
# of Buildings maintained	37	39	39	39	39
# of Restrooms maintained	57	59	59	59	59
# of Pavilions maintained	17	17	17	16	16
# of Hours utilized for trash	10,950	9,850	9,828	9,828	9,828
# of Part-time hours used	7,709	6,050	2,969	3,000	4,000
# of Vehicles maintained	29	28	29	29	30
# of Vehicle-related accidents	0	1	0	0	1

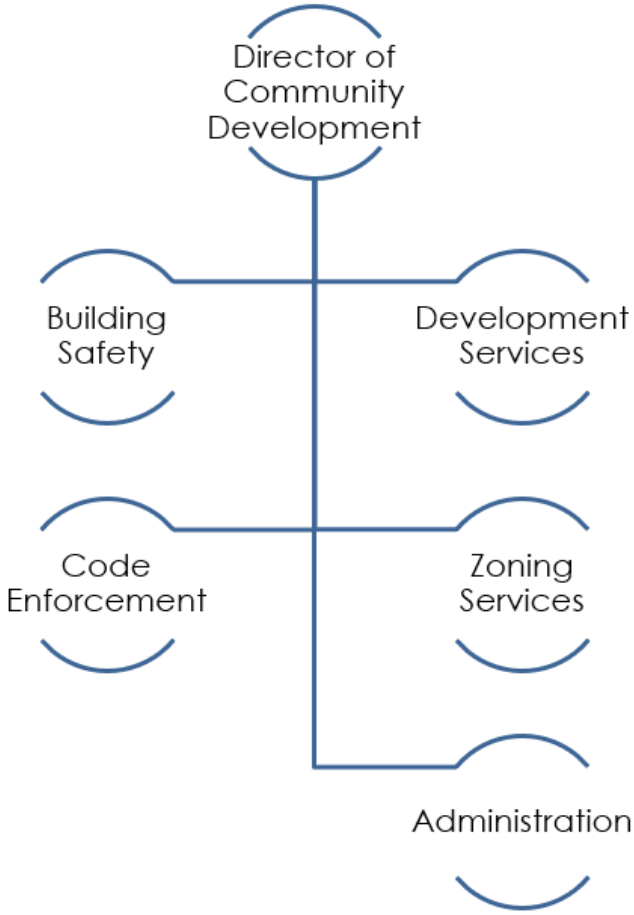


Community Development

KATHI COOK
DIRECTOR



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Our Community Vision is to advance Alpharetta as a signature City by:

Offering the highest quality environment for our residents and businesses.

Fostering strong sense of community including safety and security.

Providing a business climate that attracts the top echelon companies.

Our Community Vision serves as the guiding principles for the planning and operation of our city government and each department structures its mission, goals, and objectives to facilitate achievement of our mission. The icons set forth above are used throughout the Budget Narrative to identify the link between the city's Community Vision and the goals and objectives of our various departmental divisions/projects.

Community Development

Administration, Building Safety, Development Services, Zoning, and Code Enforcement



Mission Statement

To protect and enhance the lives of Alpharetta citizens by guiding the city's growth and safeguarding the built environment and to help further the prosperity of our business community.

Goals and Objectives

- ✓ Enforce the standard building code and zoning code.
- ✓ Provide building inspections within 48 hours of request.
- ✓ Provide efficient plans processing and permitting.
- ✓ Provide quality support to boards and commissions staffed by Community Development.
- ✓ Provide the highest quality of customer service.
- ✓ Maintain and update demographic, statistical and other data, maps, and materials.
- ✓ Process all public hearings in the most efficient manner possible.
- ✓ Maintain and process business licenses for the City.
- ✓ Collaborate with the Community to provide planning documents for the future.

Statement of Revenues and Expenditures

Community Development

General Fund

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual*	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Business Taxes:					
Occupational License Fees	$ 1,178,045	$ 1,351,767	$ 1,189,138	$ 2,170,000	$ 2,225,000
Licenses & Permits:					
Development Permits/Fees	321,956	208,467	277,625	200,000	250,000
Building Permit Fees	2,335,606	1,767,446	2,459,028	1,900,000	2,000,000
Occupancy Permit Fees	162,252	135,768	146,713	140,000	145,000
Soil Erosion Permit	31,744	52,067	69,814	50,000	60,000
Alcoholic Beverage Permit	813,172	876,652	1,034,928	1,069,000	1,063,000
Other	70,940	73,856	72,741	73,500	72,500
Charges for Services:					
Planning and Development Fees	104,126	132,269	122,120	120,000	150,000
Plan Review Fees	1,051,404	768,080	1,136,774	850,000	925,000
Other	16,688	77,885	43,781	47,100	47,900
Fines & Forfeitures	7,000	5,800	7,000	5,000	5,500
TOTAL	**$ 6,092,932**	**$ 5,450,057**	**$ 6,559,663**	**$ 6,624,600**	**$ 6,943,900**
EXPENDITURES					
Personnel Services:					
Salaries (incl. Temp. Svcs)	$ 2,377,330	$ 2,610,779	$ 2,628,649	$ 2,782,371	$ 2,929,067
Overtime	1,777	2,679	9,488	5,500	5,500
Group Insurance	673,881	668,652	687,239	780,969	836,968
FICA	173,841	189,353	188,940	213,373	224,775
Pension (Defined Benefit)	178,168	191,236	214,771	227,763	269,880
Pension (401A Contribution/Matc	209,585	246,957	246,435	314,895	334,882
Workers Compensation	63,153	61,012	56,094	61,965	62,392
OPEB Contribution	50,162	68,078	67,579	68,244	71,880
Miscellaneous	464	1,390	540	1,314	3,659
subtotal	*$ 3,728,361*	*$ 4,040,138*	*$ 4,099,734*	*$ 4,456,394*	*$ 4,739,003*
Maintenance & Operations:					
Professional Services	$ 118,155	$ 120,403	$ 8,826	$ 19,700	$ 12,700
Board Member Fees	9,100	8,700	8,700	11,000	13,500
Fuel/Repair & Maint. (Vehicle)	21,541	26,504	29,775	26,000	26,000
Advertising	86,676	132,646	23,787	26,000	26,000
Employee Training	34,124	27,769	22,695	17,000	22,500
Employee Travel	28,655	28,152	18,414	20,750	23,250
Printing	7,868	12,998	8,639	9,000	10,000
Maintenance Contracts/IT Svcs.	207,214	224,713	200,205	262,939	259,908
General Supplies	47,429	39,772	32,739	28,487	31,300
Miscellaneous	16,436	6,604	5,280	7,513	6,000
subtotal	*$ 577,198*	*$ 628,261*	*$ 359,059*	*$ 428,389*	*$ 431,158*
TOTAL	**$ 4,305,559**	**$ 4,668,399**	**$ 4,458,793**	**$ 4,884,783**	**$ 5,170,161**

Notes:

* Economic Development function was reorganized from the Community Development Department to City Administration starting in FY 2025.

Budget Narrative

The FY 2027 Budget for Community Development totals $5.1 million and represents an increase of 6%, or $285,378, compared to FY 2026.

The Personnel Services category increased 6%, or $282,609, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Increases in seasonal services funding reflect current usage trends.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., changes in staff benefit options (e.g. employee-only vs family coverage, etc.), and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).

Authorized personnel total 31 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Administrative Assistant II	1.0	-	-	-	-	-
Administrative Office Coordinator	1.0	1.0	1.0	1.0	1.0	-
Arborist	1.0	1.0	1.0	1.0	1.0	-
Building Inspector	4.0	4.0	4.0	4.0	4.0	-
Building Inspector Manager	1.0	1.0	1.0	1.0	1.0	-
Building Official	1.0	1.0	1.0	1.0	1.0	-
Building Plans Examiner	2.0	2.0	2.0	2.0	2.0	-
Code Enforcement Manager	1.0	1.0	1.0	1.0	1.0	-
Code Enforcement Officer	4.0	4.0	4.0	4.0	4.0	-
Code Enforcement Supervisor	1.0	1.0	1.0	1.0	1.0	-
Director	1.0	1.0	1.0	1.0	1.0	-
Development & Planning Manager	-	-	1.0	1.0	1.0	-
Development Services Engineer (Stormwater)	1.0	1.0	1.0	1.0	1.0	-
Economic Development Manager	1.0	1.0	-	-	-	-
Economic Development Coordinator	1.0	1.0	-	-	-	-
GIS Specialist/Special Project Planner	1.0	1.0	1.0	1.0	1.0	-
Land Development Inspector	3.0	3.0	3.0	3.0	3.0	-
Land Development Supervisor	-	1.0	1.0	1.0	1.0	-
Planning and Zoning Coordinator	1.0	1.0	1.0	1.0	1.0	-
Planning and Development Services Manager	1.0	1.0	1.0	1.0	1.0	-
Permit Technician	2.0	3.0	3.0	3.0	3.0	-
Project Administrator	1.0	-	-	-	-	-
Senior Transportation Engineer/Planner	1.0	1.0	-	-	-	-
Support Services Manager	-	1.0	1.0	1.0	1.0	-
Transportation Engineer	-	-	1.0	1.0	1.0	-
Zoning Administrator	1.0	1.0	-	-	-	-
	32.0	33.0	31.0	31.0	31.0	-

The Maintenance and Operations category increased 1%, or $2,769, due primarily to the following activity:

- Increase in employee travel/training (professional development) of $8,000 (21% growth) to augment training and industry knowledge of new and existing team members.
- All other departmental maintenance and operations accounts decreased -$5,231, or -1%, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

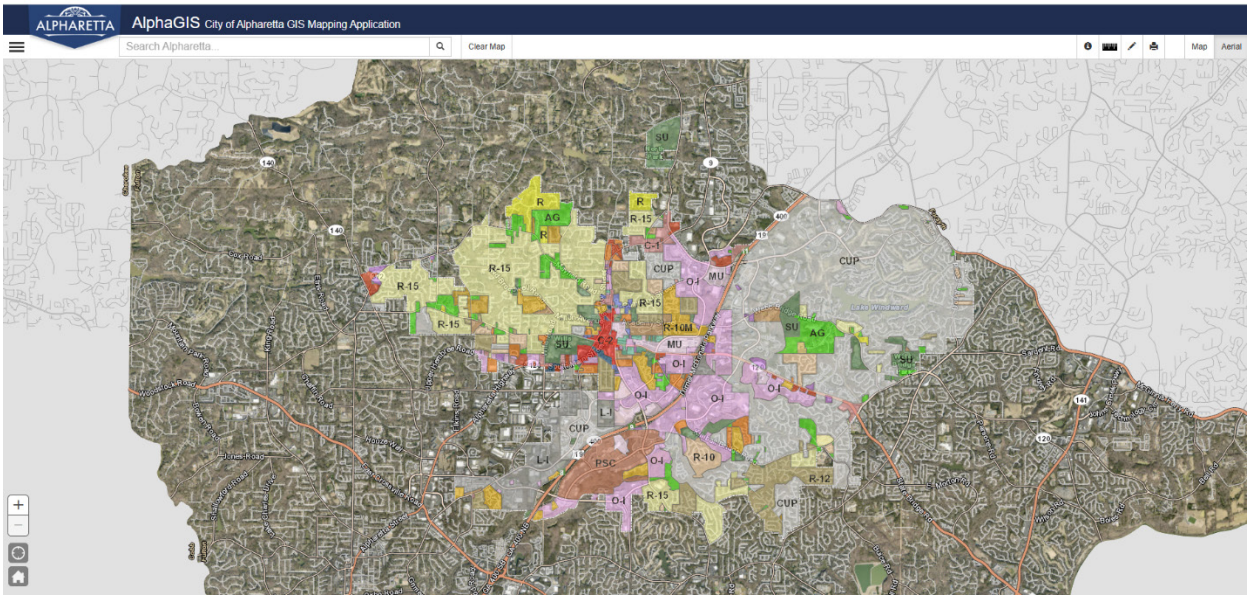
Performance Measurement

The following section provides detailed information on Community Development programs including performance measures.

- **Administration**

  Statement of Service: The purpose of Community Development Administration is to provide effective, efficient, and responsive services to account for the resources allocated to the Planning & Zoning and Code Enforcement division of the department.

Community Development - Administration					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Special projects managed	22	15	8	10	10



Alpharetta residents can access the City's zoning maps online at: https://alphagis.alpharetta.ga.us/alphagis/?z=0&x=-9382268.450&y=4039343.712&m=am2015&h=1&l=zoningCbxZoningDistrictsCbx

- **Zoning/Development/Building Safety Services**
  Statement of Service: These Divisions are tasked with guiding the growth and development of the city in a manner that enhances the quality of life and recognizes the city's historic and natural features.

Community Development - Zoning					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of New public hearings filed	95	110	102	115	115
Total # of public hearings processed	77	68	88	115	115
# of parcels annexed	0	0	0	0	0

Community Development - Development Services					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
Private development plans reviewed	151	194	124	120	115
Tree permits issued	787	891	772	750	700

Community Development - Building Safety					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of New building permits issued	4,400	4,475	4,588	5,000	5,400
# of Building inspections completed	21,730	19,336	19,254	20,000	22,000

- **Code Enforcement Services**
  Statement of Service: To protect the public health, safety, and welfare by ensuring compliance with city building and land-use codes and ordinances.

Community Development - Code Enforcement					
Performance Measurements	Actual FY 2023	Actual FY 2024	Actual FY 2025	Target FY 2026	Target FY 2027
# of Code enforcement inspections completed	2,009	2,144	1,971	1,700	1,500

Special Revenue Fund Summaries

Overview

The *Special Revenue Fund Summaries* section is intended to provide readers with an overall understanding of the respective fiscal year 2027 budgets for the city's Special Revenue Funds.

Special Revenue Funds are used to account for revenues that are legally restricted to expenditures for specific uses. All special revenue funds utilize the modified accrual basis of budgeting and accounting.

The following schedules are set forth by Fund and provide readers with revenue and expenditure summaries/narratives from several different perspectives including:

- **Fund Summary**

  This section provides a brief description of the Fund.

- **Statement of Budgetary Comparisons**

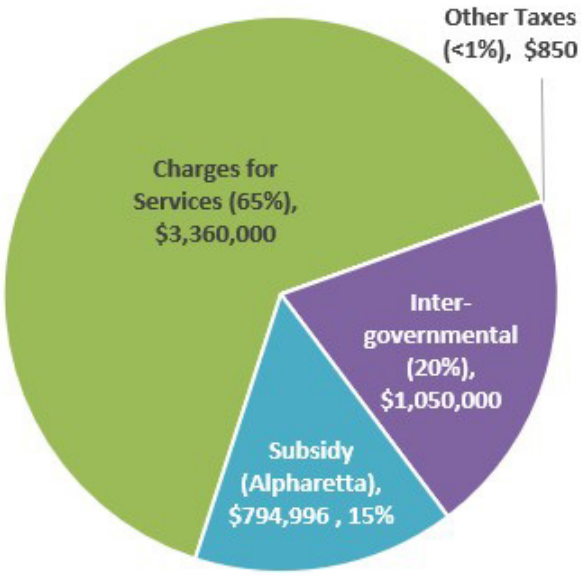
  This statement provides a detailed comparison of revenues and expenditures across multiple fiscal years. Revenues are presented by source, and expenditures are presented by use.

- **Statement of Revenues, Expenditures, and changes in Fund Balances**

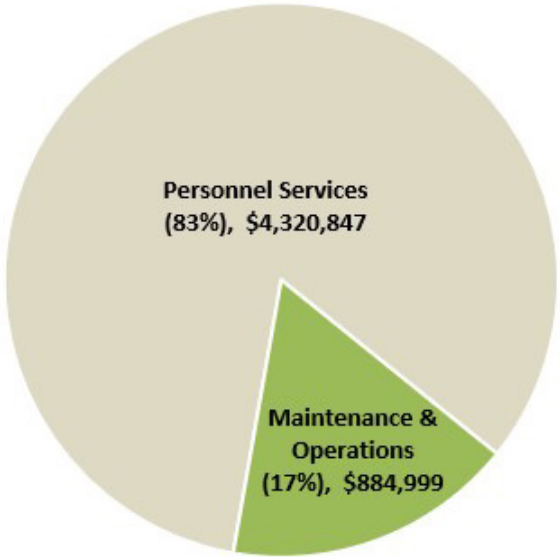
  This statement provides a historical comparison of revenues and expenditures for fiscal years 2023-2027. Also included are changes in fund balance. The financial forecast utilizes revenue collection patterns (historical and current patterns as adjusted for seasonal fluctuations), expenditure trends and mandates, etc.

Emergency 911 Fund Summary

FY 2027 Budget: $5,205,846



Revenues by Source



Expenditures by Use

The E911 Fund accounts for fees received from users, or potential users, of the city's Emergency 911 System. The fee equals $1.50 monthly and is paid by wired and wireless telecommunication providers (including prepaid cards) as well as Voice over Internet Protocol ("VOIP") providers, with expenditures occurring to maintain and run the system within the government. The Police Department manages the E911 Program.

Our E911 operations service both the City of Alpharetta and the City of Milton.

Trends

The FY 2027 Budget for the E911 Fund totals $5.2 million and represents a 5% increase, or $233,368, compared to FY 2026.

The City's E911 Fund has reached a point where recurring 911 tax revenue is no longer sufficient to fully support ongoing operational costs. As call volume, service demands, and associated personnel and technology expenses continue to rise, the E911 Fund has experienced a structural gap between revenues and expenditures. For example, E911 tax revenue in FY 2019 totaled $4.3 million while the revenue forecast for FY 2027 includes minimal growth to $4.4 million. During that same period, personnel costs alone have increased from $2.5 million in FY 2019 to $4.3 million for FY 2027.

The current E911 IGA obligates Milton to remit all related E911 Fund Revenue to the City. As 911 tax revenue trends have proven insufficient to cover ongoing operations, renegotiation of the IGA is needed.

When combined with operational costs, the E911 Fund is facing a forecasted operational deficit of -$794,996 for FY 2027. It is important to note that E911 Fund operations throughout the State often require subsidies, and the legislature is looking at options for augmenting 911 funding sources including amendments to the 911 fees.

Historical call volume reflects a usage allocation of 74% Alpharetta and 26% Milton. Using historical call volume as an allocation reference, Alpharetta's portion of the FY 2027 subsidy requirement would total $588,297 and Milton's would total $206,699.

The FY 2027 Budget proposal includes full funding of the subsidy by Alpharetta. However, it is the intent of staff to engage Milton in IGA renegotiations over the next several months to ensure a fair and equitable funding of 911 service costs.

The Personnel Services category increased 7%, or $290,754, due to multiple factors including:

- 3% performance-based merit program scheduled for July 1, 2026.
- Increases in overtime reflect current usage trends as well as market growth in group insurance costs (e.g. health, dental, vision) including staff turnover and associated changes in benefit elections (e.g. employee-only vs family coverage, etc.), pension costs, adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125), etc.

Authorized personnel total 33 full-time-equivalents ("FTE") and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
911 Communications Officer (I-III)	20.0	19.0	18.0	18.0	18.0	-
911 Communications Shift Supervisor	4.0	4.0	4.0	4.0	4.0	-
911 Division Chief	1.0	1.0	1.0	1.0	1.0	-
911 Division Deputy Chief	-	-	1.0	1.0	1.0	-
Public Safety GIS Analyst	-	1.0	1.0	1.0	1.0	-
911 Section Chief - Communications Training	1.0	-	-	-	-	-
911 Senior Communications Officer	4.0	4.0	4.0	4.0	4.0	-
911 Operations Manager	1.0	1.0	1.0	1.0	1.0	-
911 Quality Assurance & Training Coordinator	1.0	1.0	1.0	1.0	1.0	-
911 Technical Services Manager	-	1.0	1.0	1.0	1.0	-
Information Security Administrator	1.0	1.0	1.0	1.0	1.0	-
	33.0	33.0	33.0	33.0	33.0	-

The Maintenance and Operations category decreased by -1%, or -$13,385, as part of a concerted effort to reduce discretionary spending and align with current revenue/expense trends.

Statement of Budgetary Comparisons

Emergency 911 Fund

Public Safety Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Charges for Services:					
E-911 Service Fees	$ 3,545,761	$ 3,318,387	$ 2,893,523	$ 3,078,759	$ 3,100,000
E-911 Prepaid Service Fees	262,676	263,803	254,110	250,000	260,000
Other Taxes:					
Excise Tax	932	938	842	950	850
Intergovernmental:	1,107,857	1,019,472	1,022,930	1,025,000	1,050,000
Investment Earnings	35,567	44,181	(11,024)	-	-
Other					
Subsidy (Alpharetta)	-	-	-	564,175	794,996
Fund Balance	-	-	-	53,594	-
TOTAL	**$ 4,952,794**	**$ 4,646,781**	**$ 4,160,379**	**$ 4,972,478**	**$ 5,205,846**
EXPENDITURES					
Personnel Services:					
Salaries	$ 1,763,516	$ 1,968,499	$ 2,231,304	$ 2,354,285	$ 2,443,149
Overtime	379,745	470,311	330,895	300,000	354,000
Group Insurance	427,351	413,366	445,313	572,242	643,131
FICA	158,468	181,655	189,641	203,183	214,115
Pension (Defined Benefit)	130,289	137,370	180,215	171,238	198,751
Pension (401A Cont./Match)	195,281	216,973	238,005	303,486	340,261
Miscellaneous	98,973	103,076	116,130	125,659	127,440
subtotal	*$ 3,153,623*	*$ 3,491,250*	*$ 3,731,504*	*$ 4,030,093*	*$ 4,320,847*
Maintenance & Operations:					
Communications	$ 351,769	$ 484,924	$ 440,042	$ 487,600	$ 486,000
Maintenance Contracts	466,017	612,502	638,756	36,175	37,225
IT Professional Services	303,213	356,178	253,675	184,187	181,102
Miscellaneous	137,081	166,433	166,816	190,422	180,672
subtotal	*$ 1,258,080*	*$ 1,620,037*	*$ 1,499,288*	*$ 898,384*	*$ 884,999*
Capital/Leases:					
Capital	$ 8,098	$ 8,100	$ 2,390	$ 3,374	$ -
Fire Station Alerting System	115,004	193,416	-	21,581	-
E911 Telephone Hardware	192,850	-	-	-	-
CAD/Records Mgmt. Software	-	184,823	-	19,046	-
Radio Leases	76,777	302,783	226,006	-	-
subtotal	*$ 392,728*	*$ 689,122*	*$ 228,396*	*$ 44,001*	*$ -
TOTAL	**$ 4,804,431**	**$ 5,800,410**	**$ 5,459,188**	**$ 4,972,478**	**$ 5,205,846**

Statement of Revenues, Expenditures, and changes in Fund Balance

Emergency 911 Fund

Public Safety Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance	$ 2,616,736	$ 2,765,099	$ 1,611,471	$ 312,661	$ 312,661
REVENUES BY CATEGORY					
Charges for Services	$ 3,808,437	$ 3,582,191	$ 3,147,632	$ 3,328,759	$ 3,360,000
Other Taxes	932	938	842	950	850
Intergovernmental	1,107,857	1,019,472	1,022,930	1,025,000	1,050,000
Investment Earnings	35,567	44,181	(11,024)	-	-
Subsidy (Alpharetta)	-	-	-	564,175	794,996
Other	-	-	-	53,594	-
TOTAL	**$ 4,952,794**	**$ 4,646,781**	**$ 4,160,379**	**$ 4,972,478**	**$ 5,205,846**
EXPENDITURES BY FUNCTION					
Public Safety	$ 4,804,431	$ 5,800,410	$ 5,459,188	$ 4,972,478	$ 5,205,846
TOTAL	**$ 4,804,431**	**$ 5,800,410**	**$ 5,459,188**	**$ 4,972,478**	**$ 5,205,846**
ACFR Rounding Adjustments	$ -	$ -	$ -	$ -	$ -
Ending Fund Balance: (1),(2)	$ 2,765,099	$ 1,611,471	$ 312,661	$ 312,661	$ 312,661
Changes in Fund Balance (actual/est.)	$ 148,363	$(1,153,628)	$(1,298,809)	$ -	$ -

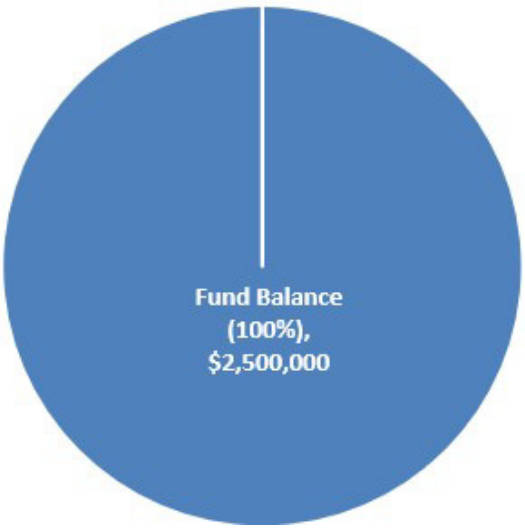
Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/ Reserve accounts.

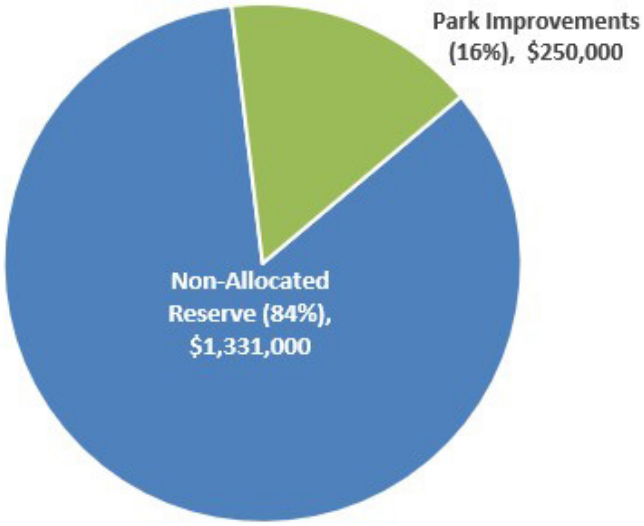
(2) Fund balance usage is for general operational budget growth including the renewal & replacement (capital) requests implemented by the North Fulton Regional Radio System Authority in FY 2024 and FY 2025. This activity was moved into the General Fund for FY 2026.

Impact Fee Fund Summary

FY 2027 Budget: $2,500,000



Revenues by Source



Expenditures by Use

The Impact Fee Fund accounts for fees assessed upon development activity. These fees are collected to pay for system improvements (recreation/parks, streets, and public safety) as detailed within the city's impact fee ordinance. The Community Development Department manages the Impact Fee Program.

Trends: The FY 2027 Budget totals $2.5 million. This fund accounts for fees assessed upon development activity. These fees are collected to pay for system improvements (recreation/parks, streets, and public safety) as detailed within the city's impact fee ordinance. Impact Fee revenues are variable and dependent upon multiple factors such as the local and national economy. Due to the variability, the annual budget typically appropriates fund balance as the primary funding tool. That is to say, appropriations are made with funds already collected (i.e. fund balance) as opposed to a forecast of collections that may not materialize due to their inherent variability.

Impact fees are being allocated to the following capital initiatives ($1.2 million) which are discussed in depth within the *Capital Project Fund Summaries* section of this document. The remaining impact fee funds ($1.3 million) are included within the Non-Allocated account for future appropriation by the City Council.

- Haynes Bridge Road Park Restroom (Greenway): $459,500, representing the impact fee contribution towards overall project costs).

- Marconi Drive Park Restroom (Greenway): $459,500, representing the impact fee contribution towards overall project costs).
- Marietta-Roswell St. Corner Park: $250,000.

Statement of Budgetary Comparisons

Impact Fee Fund
Community Development/Other Departments

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Forecast	FY 2027 Recommended Budget
REVENUES					
Charges for Services:					
Impact Fees (Roads)	$ 157,917	$ 606,084	$ 446,830	$ 136,692	$ -
Impact Fees (Parks)	279,934	1,028,868	615,007	1,870,058	-
Impact Fees (Public Safety)	27,425	63,542	57,820	66,011	-
Investment Earnings	108,181	203,932	286,064	136,587	-
Other					
Fund Balance	-	-	-	6,079,080	2,500,000
TOTAL	**$ 573,457**	**$ 1,902,426**	**$ 1,405,721**	**$ 8,288,428**	**$ 2,500,000**
EXPENDITURES					
Capital/Leases:					
Impact Fee Study Update	$ 29,195	$ -	$ 8,169	$ 29,357	$ -
Roads					
Rucker Rd Corridor Imp.	134,044	10,800	-	-	-
AlphaLoop	1,533,350	-	-	-	-
Sidewalks (Dev. Agmt)	-	-	399,139	-	-
Dryden Rd Extension	-	-	-	2,223,615	-
Parks					
Wills Park Master Plan	21,930	-	-	306,704	-
Encore Parkway Greenway Connection/Park	27,480	-	174,413	1,798,108	-
North Park Fields 1-4 Restroom Replacement	-	-	-	528,820	-
Wills Park Baseball Field 5 synthetic turf installation	-	-	-	150,000	-
Marietta and Roswell Street Corner Park	-	-	-	20,000	250,000
Sidewalks (Dev. Agmt)	-	-	348,591	-	-
Haynes Bridge Road Park Restroom (Greenway)	-	-	-	-	459,500
Marconi Drive Park Restroom (Greenway)	-	-	-	-	459,500
Public Safety					
All-Terrain Vehicles (Qty: 2)	18,690	-	-	-	-
Fire Station 81 Improvements	-	-	-	314,000	-
subtotal	*$ 1,764,689*	*$ 10,800*	*$ 930,312*	*$ 5,370,604*	*$ 1,169,000*
Non-Allocated					
Roads	$ -	$ -	$ -	$ 66,147	$ -
Parks	-	-	-	2,803,284	1,331,000
Public Safety	-	-	-	48,393	-
subtotal	*$ -*	*$ -*	*$ -*	*$ 2,917,824*	*$ 1,331,000*
TOTAL	**$ 1,764,689**	**$ 10,800**	**$ 930,312**	**$ 8,288,428**	**$ 2,500,000**

Statement of Revenues, Expenditures, and changes in Fund Balance

Impact Fee Fund

Community Development/Other Departments

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Forecast	FY 2027 Recommended Budget
Beginning Fund Balance:	$ 4,903,276	$ 3,712,045	$ 5,603,671	$ 6,079,081	$ 2,917,825
REVENUES BY CATEGORY					
Charges for Services	$ 465,276	$ 1,698,494	$ 1,119,657	$ 2,072,761	$ -
Investment Earnings	108,181	203,932	286,064	136,587	-
Other	-	-	-	-	-
TOTAL	**$ 573,457**	**$ 1,902,426**	**$ 1,405,721**	**$ 2,209,348**	**$ -**
EXPENDITURES BY FUNCTION					
Impact Fee Study Update	$ 29,195	$ -	$ 8,169	$ 29,357	$ -
Capital (Roads)	1,667,394	10,800	399,139	2,223,615	-
Capital (Parks)	49,410	-	523,004	2,803,632	1,169,000
Capital (Public Safety)	18,690	-	-	314,000	-
TOTAL	**$ 1,764,689**	**$ 10,800**	**$ 930,312**	**$ 5,370,604**	**$ 1,169,000**
ACFR Rounding Adjustments	$ -	$ -	$ -	$ -	$ -
Ending Fund Balance: (1),(2)	$ 3,712,045	$ 5,603,671	$ 6,079,081	$ 2,917,825	$ 1,748,825
Changes in Fund Balance (actual/est.)	$ (1,191,232)	$ 1,891,626	$ 475,410	$ (3,161,256)	$ (1,169,000)

Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/Reserve accounts. Please note, the city does not materially base Impact Fee investment on forecasted revenues. Instead, opting to utilize actual collections. Hence, a forecast of impact fee collections is not programmed into the FY 2027 Recommended Budget.

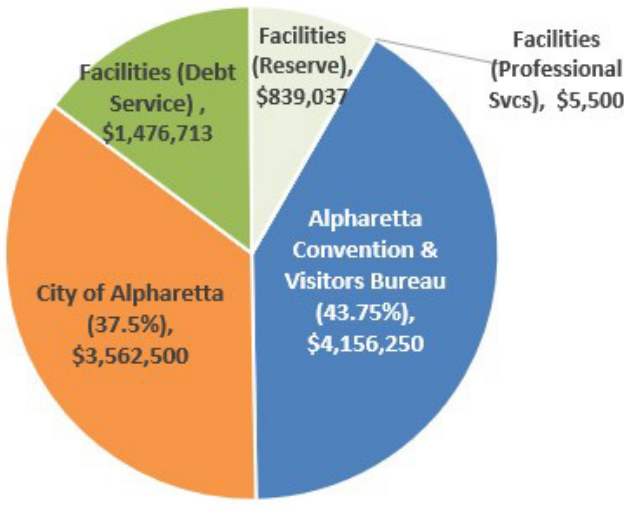
(2) Impact Fee fund balance usage is targeted towards eligible capital projects that offset the costs associated with growth (e.g. population, business, etc.).

Hotel/Motel Fund Summary

FY 2027 Budget: $10,040,000



Revenues by Source



Expenditures by Use

The Hotel/Motel Fund accounts for occupancy tax collections from area hotels and motels for the purpose of promoting conventions, tourism, and trade shows, while providing funds to facilitate economic vitality in downtown areas. The city levies a hotel/motel occupancy tax of 8% on total rental charges. The resulting tax revenue (not including investment earnings) is distributed as follows: City of Alpharetta (37.5%); Alpharetta Convention & Visitor's Bureau (43.75%); and Facilities (Conference Center/Tourism Product Development; 18.75%).

Trends

The FY 2027 Budget totals $10 million. This fund accounts for occupancy tax collections from area hotels and motels for the purpose of promoting conventions, tourism, and trade shows, while providing funds to facilitate economic vitality in downtown areas.

The city levies a hotel/motel occupancy tax of 8% on total rental charges. The resulting tax revenue (not including investment earnings) is distributed as follows: City of Alpharetta (37.5% or $3.6 million); Alpharetta Convention & Visitor's Bureau (43.75% or $4.2 million); and Tourism Product Development (18.75% or $1.8 million).

The Tourism Product Development portion of the revenue is dedicated to funding debt service on the Conference Center bonds ($1.5 million) as well as a non-allocated reserve totaling $839,037 which is available for initiatives that create, enhance, or expand tourism

assets that attract visitors and generate economic impact. The reserve is funded partially through an appropriation of fund balance totaling $500,000 which represents prior-year Tourism Product Development monies in excess of the $1.5 million debt service reserve included within the Fund (aimed at augmenting debt service coverage in times of economic volatility).

Hotel/Motel tax collection forecast for FY 2027 totals $9.5 million and represents an increase of 4% compared to the FY 2026 budget. However, actual collections for FY 2026 are estimated at $9.6 million (through February 2026). The forecast for FY 2027 is conservative given current economic volatility (e.g. fuel prices) and their potential impact on the travel/hospitality industry.

Statement of Budgetary Comparisons

Hotel/Motel Fund
Multiple Departments

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Other Taxes					
Hotel/Motel Taxes	$ 9,277,072	$ 9,111,647	$ 9,272,425	$ 9,100,000	$ 9,500,000
Interest/Penalties	30,167	3,150	1,654	-	-
Investment Earnings	-	66,778	98,135	20,000	40,000
Other					
Fund Balance	-	-	-	1,752,468	500,000
TOTAL	**$ 9,307,239**	**$ 9,181,576**	**$ 9,372,213**	**$ 10,872,468**	**$ 10,040,000**
EXPENDITURES					
ACVB/City					
Alpharetta Convention & Visitors Bureau	$ 4,058,719	$ 3,987,724	$ 4,057,409	$ 3,981,250	$ 4,156,250
City of Alpharetta (transfer-out)	3,480,902	3,418,049	3,477,779	3,412,500	3,562,500
subtotal	*$ 7,539,621*	*$ 7,405,773*	*$ 7,535,189*	*$ 7,393,750*	*$ 7,718,750*
Facility					
Professional Svcs (Bond Admin)	$ 5,915	$ 6,065	$ 6,415	$ 5,500	$ 5,500
Series 2016 Bonds (debt service)	1,365,213	1,392,713	1,417,213	1,448,713	1,476,713
Debt Svc Reserve (Contingency)	-	-	-	1,500,000	-
Tourism Product Development Reserve	-	-	-	509,435	839,037
Equestrian Center Improvements	-	-	-	-	-
Wills Park Maint. Facility	309,369	-	-	-	-
Wills Park Master Plan Imp.	268,248	-	-	15,070	-
subtotal	*$ 1,948,744*	*$ 1,398,778*	*$ 1,423,628*	*$ 3,478,718*	*$ 2,321,250*
TOTAL	**$ 9,488,366**	**$ 8,804,550**	**$ 8,958,816**	**$ 10,872,468**	**$ 10,040,000**

Statement of Revenues, Expenditures, and changes in Fund Balance

Hotel/Motel Fund

Multiple Departments

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$ 1,143,171	$ 962,046	$ 1,339,073	$ 1,752,472	$ 2,009,439
REVENUES BY CATEGORY					
Hotel Taxes	$ 9,307,239	$ 9,114,797	$ 9,274,078	$ 9,100,000	$ 9,500,000
Investment Earnings	-	66,778	98,135	20,000	40,000
Other	-	-	-	-	-
TOTAL	**$ 9,307,239**	**$ 9,181,576**	**$ 9,372,213**	**$ 9,120,000**	**$ 9,540,000**
EXPENDITURES BY FUNCTION					
Alpharetta Convention & Visitors Bureau	$ 4,058,719	$ 3,987,724	$ 4,057,409	$ 3,981,250	$ 4,156,250
City of Alpharetta (transfer-out)	3,480,902	3,418,049	3,477,779	3,412,500	3,562,500
Tourism Product Development portion of the Hotel Tax:					
Debt Service, Other	1,371,128	1,398,778	1,423,628	1,454,213	1,482,213
Eligible System Improvements	577,617	-	-	15,070	-
TOTAL	**$ 9,488,366**	**$ 8,804,550**	**$ 8,958,816**	**$ 8,863,033**	**$ 9,200,963**
ACFR/Rounding Adjustments	$ 1	$ 2	$ 1	$ -	$ -
Ending Fund Balance: (1),(2)	$ 962,046	$ 1,339,073	$ 1,752,472	$ 2,009,439	$ 2,348,476
Changes in Fund Balance (actual/est.)	$ (181,125)	$ 377,027	$ 413,398	$ 256,967	$ 339,037

Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/R

(2) Revenue is to be distributed to the participating entities based on their relative share. Funding for Tourism Product Development is used for debt service on the Series 2016 Conference Center Bonds or reserved for debt service/future eligible initiatives (fund balance within the Hotel/Motel Fund).

Capital Project Fund Summaries

Overview

Pursuant to the Governmental Accounting Standards Board's ("GASB") Codification, Section 1300.106, capital project funds are used to account for the acquisition and construction of major items, such as buildings, infrastructure, parks, streets, and other major capital facilities.



The city's capital program has the most visible and long-term effect on the quality of life for our stakeholders. Through an aggressive capital program, improvements to transportation, access to quality cultural and recreational opportunities, partnering with local businesses for continued economic development, and providing infrastructure and assets for public safety are afforded. The foundation of the city's capital program is the five-year capital project improvement plan ("CIP") which is updated annually. The CIP assists in the planning, acquisition, and financing of capital projects.

A capital project generally is defined as an expenditure that has an expected useful life of more than three years with an estimated total cost of $25,000 or more, or an improvement/ addition to an existing capital asset. Examples include building/ infrastructure construction, park improvements, streetscapes, land acquisitions, vehicles, etc.

Capital projects are budgeted primarily in the city's capital project funds with the main exceptions being those capital investments funded through restricted revenues that require separate accounting treatment (e.g., Impact Fees, Asset Forfeiture, E911 Fees, etc.).

The city has six (6) capital project funds, and they all follow the life-to-date budgeting process whereby budget is carried forward annually to cover Council approved projects and remains in full-effect until project completion or re-allocation by City Council. As such, these appropriations are not reflected in this budget document but are reflected in the city's monthly financial management reports and can be accessed at www.alpharetta.ga.us. The capital project funds utilize the modified accrual basis of budgeting and accounting.

CAPITAL PROJECT FUND SUMMARIES

The following section provides a brief narrative of the city's capital project funds.

- **Capital Project Fund**: This fund accounts for the acquisition and construction of major items, such as buildings, infrastructure, parks, streets, and other major capital facilities, with a value (generally) in excess of $25,000. Funding for these capital improvements typically comes from the General Fund through (A) an annual appropriation and (B) a transfer of the available fund balance from the most recent complete/audited fiscal year. Appropriations are perpetual with only new appropriations recognized in the annual budget.
- **Stormwater Capital Fund**: This fund accounts for stormwater/drainage maintenance, repair, and/or improvement projects with a value (generally) in excess of $25,000. Funding for these capital improvements typically comes from the General Fund through (A) an annual appropriation and (B) a transfer of the available fund balance from the most recent complete/audited fiscal year. Appropriations are perpetual with only new appropriations recognized in the annual budget.
- **Capital Grants Fund**: This fund accounts for resources received from federal, state, and local grants awarded to the city. Matching funds, which represent the city's financial investment, are also recorded within this fund. This fund accounts for capital grants only. Operating grant proceeds are recorded within the Operating Grant Fund.
- **TSPLOST 1 Capital Fund**: This fund accounts for the collection of TSPLOST 1 (Transportation Special Purpose Local Option Sales Taxes) revenue and the expenditure on eligible transportation improvements and congestion mitigation initiatives. Fund appropriations are perpetual with only new appropriations (e.g. investment earnings) recognized in the annual budget. This tax was imposed for the period of April 1, 2017, through March 31, 2022.
- **TSPLOST 2 Capital Fund**: This fund accounts for the collection of TSPLOST 2 (Transportation Special Purpose Local Option Sales Taxes) revenue and the expenditure on eligible transportation improvements and congestion mitigation initiatives. Fund appropriations are perpetual with only new appropriations (e.g. investment earnings) recognized in the annual budget. This tax is imposed for the period of April 1, 2022, through March 31, 2027.
- **2022 Parks Bond Fund**: This fund accounts for the proceeds and associated expenditures resulting from the issuance of voter approved general obligation bonds, series 2022. Fund appropriations will be perpetual with only new appropriations (e.g. investment earnings) recognized in the annual budget.

For the purposes of this budget document, the Capital Projects Fund, Stormwater Capital Fund, TSPLOST 1 Capital Fund, TSPLOST 2 Capital Fund, and 2022 Parks Bond Fund are presented as new appropriation activity is recommended for FY 2027.

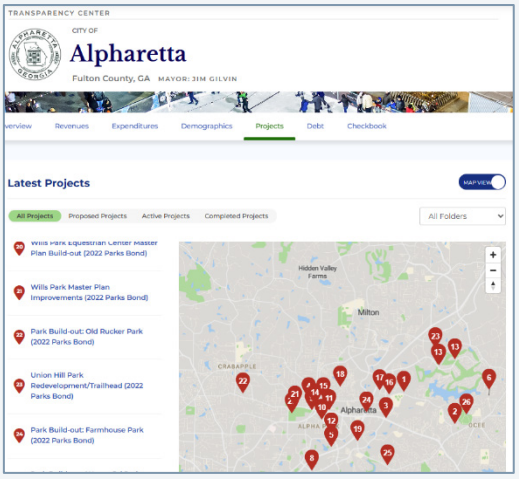


The City of Alpharetta website is a great resource to stay informed about development and capital improvements in Alpharetta (www.alpharetta.ga.us).

City Projects

The purpose of the City Projects page is to put information on key road, park, and other City of Alpharetta infrastructure projects quickly and easily in the hands of our residents and corporate citizens whose tax dollars largely fund these projects.

https://cleargov.com/georgia/fulton/city/alpharetta/projects





Private Development

Businesses and other private property owners know that an investment in Alpharetta is one that is hard to beat. Many of those investments come in the form of significant commercial, residential, or mixed-use projects that pique the interest of Alpharetta citizens. Use our map-based tool to easily find out what new projects Private Developers are pursuing in our community.

https://www.alpharetta.ga.us/219/Private-Development

Funding Methodology

The city's preferred method for funding capital projects within the CIP shall be through current revenue when available (i.e., pay-as-you-go) or from outside funding sources such as grant funding and related aid. Debt obligations may be issued for capital projects when it is appropriate to achieve a fair allocation of costs between current and future beneficiaries. Funding for the CIP is provided as follows:

- **Proper Use of Fund Balance**
  General Fund: Based on audited financial statements for the year ending June 30, 2025, the city's fund balance totaled $35.7 million. Of this amount, approximately $5 million was appropriated in the FY 2026 Budget for capital/one-time initiatives/

reserve, $800,000 for legal contingency reserves, and $24.2 million has been designated as an emergency account based on a conservative policy of 25% of total appropriations (i.e., roughly 3 months of operating expenditure). It has been the city's policy to utilize the remaining fund balance above the emergency requirement for one-time expenditures (generally capital investment). Available capital/one-time initiative funding for FY 2027 totals $5.7 million.

- **Funding Capital from Operating Budget**
  The FY 2027 budget includes funding totaling $475,000 from General Fund operations for capital investment (e.g., replacement of our infrastructure and equipment, etc.). The annual capital funding goal from General Fund operations is $7.5 million and is a budgetary planning priority for future budgets. By programming an annual capital contribution into the operating budget, the city is announcing to its citizens and stakeholders that capital investment in our roads and infrastructure is a priority that should be funded with certainty as opposed to relying on fund balance which may or may not be accumulated. Funding from the General Fund, which is available for immediate capital investment in 2027, includes the following:

$ 5,661,572	Fund Balance for one-time capital.
475,000	Capital Contribution from the General Fund.
$ 6,136,572	

- **Debt Funding**: Debt obligations, including capital leases, are primarily reserved for large-scale capital projects when it is appropriate to achieve a fair allocation of costs between current and future beneficiaries.

FY 2027 Capital Funding

The FY 2027 Capital Plan includes funding of $36.5 million for capital initiatives (including potential grant funding). Base capital funding totals $32.7 million and has been appropriated to the identified projects and non-allocated. Other Sources totaling $3.8 million and consisting of anticipated LMIG (Local Maintenance & Improvement Grant) and LRA (Local Roads Assistance Grant) grant funding and Capital Lease funding will be appropriated once received (and/or appropriate agreements executed).

Recommended capital investment totals $18.3 million and is focused on maintaining and improving city infrastructure and assets, including:

- Acting on the findings of the Facility Condition Assessment completed during FY 2025 (City Facility Preventative Maintenance Assessment and Implementation, HVAC Replacements, generator replacements, Public Safety Headquarters maintenance, Fire Station maintenance, City Hall maintenance, etc.).

- Continuing focus on the responsible maintenance and preservation of our municipal infrastructure to serve the needs of the entire community now and into the future (milling/resurfacing, stormwater, fleet, equipment, parks amenities, etc.).
- Incorporating the Fleet Maintenance and Replacement Policy (adopted in FY 2026) process into the annual budget and CIP which establishes a uniform framework for fleet maintenance, acquisition, utilization, and replacement planning across all City departments.
- Delivering on prior-year design projects (Marietta-Roswell St. Corner Park).
- Leveraging restricted revenue sources (parks impact fees) to deliver service improvements to our citizens and stakeholders (Greenway restrooms at Haynes Bridge Road Park and Marconi Drive Park as well as buildout of the Marietta-Roswell St. Corner Park).

An additional $18.2 million is being reserved to provide flexibility for future prioritized capital investment.

FY 2027 Capital Source & Use Summary	Capital Project Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund	TSPLOST 2 Capital Fund	Impact Fee Fund (Parks)	Subtotal	Other Sources (grants, etc.)	Total
Sources									
Available Fund Balance	$ 3,500,000	$ -	$ 450,000	$ 1,939,099	$ 7,600,000	$ 2,500,000	$ 15,989,099	$ -	$ 15,989,099
General Fund									
Annual Capital Appropriation	475,000	-	-	-	-	-	475,000	-	475,000
Available Fund Balance	4,261,572	1,400,000	-	-	-	-	5,661,572	-	5,661,572
TSPLOST Collections	-	-	-	-	9,000,000	-	9,000,000	-	9,000,000
Investment Earnings	400,000	100,000	-	300,000	750,000	-	1,550,000	-	1,550,000
Other									
Local Maintenance Improvement Grant (LMIG); Milling and Resurfacing	-	-	-	-	-	-	-	731,300	731,300
Local Roads Assistance Grant (LRA); Milling and Resurfacing	-	-	-	-	-	-	-	838,403	838,403
Capital Leases	-	-	-	-	-	-	-	2,275,000	2,275,000
Total Sources	**$ 8,636,572**	**$ 1,500,000**	**$ 450,000**	**$ 2,239,099**	**$ 17,350,000**	**$ 2,500,000**	**$ 32,675,671**	**$ 3,844,703**	**$ 36,520,374**
Uses									
Capital/One-Time Initiatives									
Economic Development	$ 100,000	$ -	$ -	$ -	$ -	$ -	$ 100,000	$ -	$ 100,000
Information Technology	567,800	-	-	-	-	-	567,800	-	567,800
Police	1,556,249	-	-	-	-	-	1,556,249	-	1,556,249
Public Works	2,750,000	1,500,000	-	-	5,131,597	-	9,381,597	3,844,703	13,226,300
Recreation, Parks & Cultural Servi	1,243,500	-	450,000	-	-	1,169,000	2,862,500	-	2,862,500
Community Development	-	-	-	-	-	-	-	-	-
Total Uses	**$ 6,217,549**	**$ 1,500,000**	**$ 450,000**	**$ -**	**$ 5,131,597**	**$ 1,169,000**	**$ 14,468,146**	**$ 3,844,703**	**$ 18,312,849**
Non-Allocated (Future Capital/One-Time Initiatives)	**$ 2,419,023**	**$ -**	**$ -**	**$ 2,239,099**	**$ 12,218,403**	**$ 1,331,000**	**$ 18,207,525**		

Capital Initiatives not recommended for funding total $7.2 million. Detailed narratives for the Staff Recommended and Unfunded Capital Initiatives are included herein.

FY 2027 Recommended Capital Project Listing

The following section provides both a (1) summary list of Staff Recommended Capital Initiatives for FY 2027 and is followed by (2) a detailed narrative of each capital initiative.

FY 2027 Capital Source & Use Detail	Capital Project Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund	TSPLOST 2 Capital Fund	Impact Fee Fund (Parks)	Subtotal	Other Sources (grants, etc.)	Total
Sources									
Available Fund Balance	$ 3,500,000	$ -	$ 450,000	$ 1,939,099	$ 7,600,000	$ 2,500,000	$ 15,989,099	$ -	$ 15,989,099
General Fund									
Annual Capital Appropriation	475,000	-	-	-	-	-	475,000	-	475,000
Available Fund Balance	4,261,572	1,400,000	-	-	-	-	5,661,572	-	5,661,572
TSPLOST Collections	-	-	-	-	9,000,000	-	9,000,000	-	9,000,000
Investment Earnings	400,000	100,000	-	300,000	750,000	-	1,550,000	-	1,550,000
Other									
Local Maintenance Improvement Grant (LMIG); Milling and Resurfacing	-	-	-	-	-	-	-	731,300	731,300
Local Roads Assistance Grant (LRA); Milling and Resurfacing	-	-	-	-	-	-	-	838,403	838,403
Capital Leases	-	-	-	-	-	-	-	2,275,000	2,275,000
Total Sources	**$ 8,636,572**	**$ 1,500,000**	**$ 450,000**	**$ 2,239,099**	**$ 17,350,000**	**$ 2,500,000**	**$ 32,675,671**	**$ 3,844,703**	**$ 36,520,374**
Uses									
Capital/One-Time Initiatives									
Economic Development									
Economic Development Toolbox	$ 100,000	$ -	$ -	$ -	$ -	$ -	$ 100,000	$ -	$ 100,000
	$ 100,000	$ -	$ -	$ -	$ -	$ -	$ 100,000	$ -	$ 100,000
Information Technology									
Technology Replacement (all City Departments)	$ 397,800	$ -	$ -	$ -	$ -	$ -	$ 397,800	$ -	$ 397,800
Data Center Auxiliary A/C Replacement	45,000	-	-	-	-	-	45,000	-	45,000
AI Strategy (study)	125,000	-	-	-	-	-	125,000	-	125,000
	$ 567,800	$ -	$ -	$ -	$ -	$ -	$ 567,800	$ -	$ 567,800
Police									
Police (Fleet Replacement)	$ 1,481,249	$ -	$ -	$ -	$ -	$ -	$ 1,481,249	$ -	$ 1,481,249
Citywide Camera Infrastructure	75,000	-	-	-	-	-	75,000	-	75,000
	$ 1,556,249	$ -	$ -	$ -	$ -	$ -	$ 1,556,249	$ -	$ 1,556,249

FY 2027 Capital Source & Use Detail	Capital Project Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund	TSPLOST 2 Capital Fund	Impact Fee Fund (Parks)	Subtotal	Other Sources (grants, etc.)	Total
Uses									
Capital/One-Time Initiatives									
Public Works									
Milling and Resurfacing	$ -	$ -	$ -	$ -	$ 3,161,597	$ -	$ 3,161,597	$ 1,569,703	$ 4,731,300
Traffic Striping and Signage	-	-	-	-	320,000	-	320,000	-	320,000
Signalized Intersection Maintenance (incl. Traffic Control Equipment)	-	-	-	-	210,000	-	210,000	-	210,000
Bridge and Guardrail Maintenance	-	-	-	-	250,000	-	250,000	-	250,000
Traffic Calming Improvements	-	-	-	-	50,000	-	50,000	-	50,000
Traffic Signal Pole Maintenance	-	-	-	-	150,000	-	150,000	-	150,000
Sidewalk and Brick Paver Maintenance and Repair	-	-	-	-	750,000	-	750,000	-	750,000
Stormwater	-	1,500,000	-	-	-	-	1,500,000	-	1,500,000
Department Pool Vehicles (Fleet Replacement)	95,000	-	-	-	-	-	95,000	-	95,000
F-150 Truck (Fleet Replacement)	220,000	-	-	-	-	-	220,000	-	220,000
F-250 Crew Cab Service Truck (Fleet Replacement)	80,000	-	-	-	-	-	80,000	-	80,000
F-350 Crew Cab Service Bed Truck (Fleet Replacement)	85,000	-	-	-	-	-	85,000	-	85,000
F-550 Crew Cab Dump Truck (Fleet Replacement)	200,000	-	-	-	-	-	200,000	-	200,000
Trailers (Equipment Replacement)	30,000	-	-	-	-	-	30,000	-	30,000
Asphalt Paver (Equipment Replacement/Upgrade)	-	-	-	-	240,000	-	240,000	-	240,000
Winter Weather Equipment Storage	45,000	-	-	-	-	-	45,000	-	45,000
Facility Condition Assessment (Phase 1) Implementation	1,150,000	-	-	-	-	-	1,150,000	2,275,000	3,425,000
Police Headquarters (Facility Maintenance/Improvements)	200,000	-	-	-	-		200,000	-	200,000
Fire Facilities (Facility Maintenance/Improvements)	40,000	-	-	-	-	-	40,000	-	40,000
Fire Facilities (Roof Repairs/Replacements and Wall Restoration)	90,000	-	-	-	-	-	90,000	-	90,000
City Hall (Facility Maintenance/Improvements)	35,000	-	-	-	-	-	35,000	-	35,000
Recreation Facilities (Facility Maintenance/Improvements)	50,000	-	-	-	-	-	50,000	-	50,000
Parking Garages (Facility Maintenance/Improvements)	125,000	-	-	-	-	-	125,000	-	125,000

FY 2027 Capital Source & Use Detail	Capital Project Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund	TSPLOST 2 Capital Fund	Impact Fee Fund (Parks)	Subtotal	Other Sources (grants, etc.)	Total
Uses									
Capital/One-Time Initiatives									
Public Works *continued*									
HVAC Replacements (Facility Maintenance/Improvements)	165,000	-	-	-	-	-	165,000	-	165,000
Generator Replacements (Facility Maintenance/ Improvements)	100,000	-	-	-	-	-	100,000	-	100,000
Public Works (Design Services)	40,000	-	-	-	-	-	40,000	-	40,000
	$ 2,750,000	$ 1,500,000	$ -	$ -	$ 5,131,597	$ -	$ 9,381,597	$ 3,844,703	$ 13,226,300
Recreation, Parks & Cultural Services									
Park Repairs and Improvements	$ 200,000	$ -	$ -	$ -	$ -	$ -	$ 200,000	$ -	$ 200,000
Park Security Repairs & Improvements (security cameras, etc.)	60,000	-	-	-	-	-	60,000	-	60,000
Park Trail Maintenance	25,000	-	-	-	-	-	25,000	-	25,000
Wood Lightpole/LED Replacement Initiative	-	-	450,000	-	-	-	450,000	-	450,000
Playground Equipment Replacement	50,000	-	-	-	-	-	50,000	-	50,000
Park Shade Structure & Awning Replacements	30,000	-	-	-	-	-	30,000	-	30,000
Athletic Court Resurfacing	300,000	-	-	-	-	-	300,000	-	300,000
Fountain and Pool Repairs (new to CIP)	75,000	-	-	-	-	-	75,000	-	75,000
Alpha Loop Maintenance and Repair (new to CIP)	50,000	-	-	-	-	-	50,000	-	50,000
Tree Maintenance, Planting and Removal in Parks	125,000	-	-	-	-	-	125,000	-	125,000
General Equipment Replacement (Recreation)	62,500	-	-	-	-	-	62,500	-	62,500
Alpharetta Public Arts (Outdoor On-Loan Sculpture Exhibit)	45,000	-	-	-	-	-	45,000	-	45,000
Public Art in the Parks	20,000	-	-	-	-	-	20,000	-	20,000
Public Art Fund by Developers - City Property	10,000	-	-	-	-	-	10,000	-	10,000
Public Art for City Projects	25,000	-	-	-	-	-	25,000	-	25,000
Haynes Bridge Road Park Restroom (Greenway)	40,500	-	-	-	-	459,500	500,000	-	500,000
Marconi Drive Park Restroom (Greenway)	40,500	-	-	-	-	459,500	500,000	-	500,000

FY 2027 Capital Source & Use Detail	Capital Project Fund	Stormwater Capital Fund	2022 Parks Bond Fund	TSPLOST 1 Capital Fund	TSPLOST 2 Capital Fund	Impact Fee Fund (Parks)	Subtotal	Other Sources (grants, etc.)	Total
Uses									
Capital/One-Time Initiatives									
Recreation, Parks & Cultural Services *continued*									
Marconi Drive Park Restroom (Greenway)	40,500	-	-	-	-	459,500	500,000	-	500,000
Marietta-Roswell St. Corner Park	-	-	-	-	-	250,000	250,000	-	250,000
Outdoor Electrical Connections for Roswell Street and Canton Street (Holiday Lighting) - new to CIP	50,000	-	-	-	-	-	50,000	-	50,000
Alpha Loop Electrical Installation - new to CIP	25,000	-	-	-	-	-	25,000	-	25,000
Recreation (Design Services)	10,000	-	-	-	-	-	10,000	-	10,000
	$ 1,243,500	$ -	$ 450,000	$ -	$ -	$ 1,169,000	$ 2,862,500	$ -	$ 2,862,500
Total Uses	**$ 6,217,549**	**$ 1,500,000**	**$ 450,000**	**$ -**	**$ 5,131,597**	**$ 1,169,000**	**$ 14,468,146**	**$ 3,844,703**	**$ 18,312,849**
Non-Allocated (Future Capital/One-Time Initiatives)	**$ 2,419,023**	**$ -**	**$ -**	**$ 2,239,099**	**$ 12,218,403**	**$ 1,331,000**	**$ 18,207,525**		

Budgeted as part of the FY 2027 Budget.

Budgeted once received.

Fiscal Year 2027 Annual Action Plan

The City Council Retreat during January 2026 set forth priorities to guide the construction of the FY 2027 budget including operations and capital investment. These priorities were condensed into an Annual Action Plan and are detailed within the section of this document entitled *Fiscal Year 2027 Annual Action Plan* with the components set forth below:

- Strategic Growth and Redevelopment of North Point
- Safe and Welcoming Community
- The Alpha Loop and Greenway
- Downtown Alpharetta
- Communications that Connect
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance
- Transportation and Traffic
- People Focused Workforce
- Economic Development

Detail (Recommended Capital Initiatives)

Economic Development

Economic Development Toolbox **$100,000**

Fiscal Year 2027 Annual Action Plan:

- Economic Development

Description: This request is funding for consultants, counsel, and related professionals to study and implement economic development priorities. Operating Budget Impact: N/A.

Information Technology

Technology Replacement (all city departments) **$397,800**

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is to provide for the annual replacement, procurement, and upgrading of technology for all city departments. As in previous years, funding for technology replacement is placed in one capital project account to allow for more efficient management (as opposed to being spread across multiple departments based on an estimate of replacement needs which may or may not equate to the actual need during the fiscal year). The city currently has over 520 computers in operation (desktops/laptops). The main component of the FY 2027 request includes funding for the replacement of computers, iPhones, iPads, and printers (as needed).

The current city standards for technology replacement (based on funding availability)are as follows: servers (5 years); SANS – Storage (5 years); desktop PCs (4 years); laptop PCs (4 years); iPad tablets (3 years); iPhones (3 years); large scale multi-function printers (MFPs) (5-7 years); small scale MFPs (5 years); small printers (3-5 years); desktop UPS (electrical service backup) (3 years); monitors (8 years). Operating Budget Impact: Routine replacement capital - operating costs to decrease due to decline in repairs. Frees-up IT staff to focus on other priorities.

Data Center Auxiliary A/C Replacement **$45,000**

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of the auxiliary rooftop air-conditioning unit serving the Public Works Data Center. This facility houses the City's core servers and storage infrastructure that provide the virtual environment supporting operations at this location and throughout the City.

The data center is currently served by two HVAC units: a 2011 rooftop unit and a 2015 ground-mounted unit. The systems operate on a lead-lag rotation schedule, with each unit conditioning the space for approximately one to two weeks at a time before alternating. This configuration promotes balanced run time and preserves system redundancy.

Server room HVAC systems typically have a shorter lifecycle of approximately 10–15 years due to continuous operation and the critical need to maintain precise environmental conditions. Although the alternating setup reduces individual run time, the rooftop unit has now reached 15 years of service life. At this age, the risk of mechanical failure increases, and replacement parts may become more difficult or costly to obtain.

Proactive replacement of the rooftop unit is recommended to maintain environmental stability, ensure continued redundancy, and protect the City's investment in critical IT infrastructure. This project supports operational continuity, reduces the risk of unplanned downtime, and aligns with best practices for data center resilience and long-term asset management.

Operating Budget Impact: Operational costs consist of added electricity usage and equipment maintenance and are currently budgeted.

AI Strategy (study) **$125,000**

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: The City's growing use of AI tools, including Copilot Chat GCC, Microsoft 365 Copilot GCC, and Copilot Studio, represents a significant opportunity to improve efficiency, enhance constituent services, and strengthen data-driven decision-making across all departments. To maximize the return on these investments, the City requires a comprehensive AI strategy and implementation plan that aligns technology adoption with organizational priorities, governance requirements, and workforce readiness. Engaging a consultant with public-sector AI expertise will ensure that our approach is purposeful, secure, and consistent with government-grade compliance and responsible-use standards. This support will help the City establish a clear roadmap for how AI can be safely and effectively integrated into daily operations.

Additionally, the City maintains numerous disparate systems that generate large volumes of operational, public safety, financial, and service-delivery data. Unlocking the full value of AI depends on understanding, organizing, and utilizing this data cohesively. A consultant will assess our current data environment, identify opportunities for integration and automation, and develop a plan for enabling cross-departmental insights through secure and governed AI models.

This $125,000 investment will accelerate our ability to adopt AI responsibly, leverage our existing tools more effectively, and support long-term innovation in municipal operations and resident service delivery.

Operating Budget Impact: N/A.

Police

Fleet Replacement (Qty: 18) - Police $1,481,249

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of Police Department vehicles in accordance with the City's Fleet Maintenance and Replacement Policy ("Policy"). Vehicle replacement requests for the upcoming budget year meet the established criteria within the Vehicle Replacement Framework section of the Policy while all other years are based on a forecast of vehicles meeting the established criteria (e.g. based on forecasted utilization rates, etc.).

The vehicles identified below will be recommended for replacement based on the Vehicle Replacement Framework within the Policy, which includes multiple criteria such as age/mileage (depending on vehicle category), idle time, maintenance cost analysis, reliability and downtime, safety issues, obsolescence, and mission suitability. Applicable age categories include:

- Police Pursuit Cars/SUVs (minimum of 8 years and/or 125,000 miles).
- Police Motorcycles (minimum of 6 years and/or 60,000 miles).
- Sedans, SUVs, Trucks (minimum of 12 years and/or 150,000 miles).

The request for FY 2027 includes the forecasted replacement of the following:

Year	Make	Model	VIN	Division	type	PD / FD	Mileage 12/2025
2015	Ford	Explorer	1FM5K8AR6FGB61945	Patrol	SUV	Police	103,627
2015	Ford	Explorer	1FM5K8AR2FGB61943	Patrol	SUV	Police	103,424
2015	Ford	Explorer	1FM5K8AR8FGB61946	Patrol	SUV	Police	102,230
2016	Ford	Explorer	1FM5K8AR8GGB65464	Patrol	SUV	Police	109,185
2016	Ford	Explorer	1FM5K8AR0GGC14981	Patrol	SUV	Police	108,916
2016	GMC	Sierra 2500HD	1GT11REG4GF226495	Patrol	Pickup Truck	Police	102,262
2016	Ford	Explorer	1FM5K8AR6GGC14984	Patrol	SUV	Police	78,024
2016	Ford	Explorer	1FM5K8AR4GGC14983	Patrol	SUV	Police	99,033
2017	Ford	Explorer	1FM5K8AR0HGE15426	PD Admin	SUV	Police	96,024
2017	Ford	Explorer	1FM5K8AR6HGE15432	Patrol	SUV	Police	100,807
2017	Ford	Explorer	1FM5K8AR6HGE15429	PD Admin	SUV	PD Admin 911	92,297
2017	Honda	Pilot	5FNYF6H18HB053575	PD Admin	SUV	Police	97,073
2018	Ford	Explorer	1FM5K8AR5JGC75878	Patrol	SUV	Police	107,859
2018	Ford	Explorer	1FM5K8AR0JGC75870	Patrol	SUV	Police	116,129
2018	Ford	Explorer	1FM5K8AR6JGC75887	PD Admin	SUV	Police	101,770
2018	Ford	Explorer	1FM5K8AR3JGC75877	Patrol	SUV	Police	100,389
2018	Ford	Explorer	1FM5K8AR0JGC75884	PD Admin	SUV	Police	97,837
2018	Ford	Explorer	1FM5K8AR1JGB34418	Patrol	SUV	Police	95,899

- Police Pursuit Cars/SUVs = ten (10) Chevrolet Tahoe PPV vehicles that meet the replacement criteria based on a combination of age, mileage, and idle time. Pricing is ten (10) vehicles x $86,490 ($59,850 base vehicle + $26,640 upfitting) = $864,900.
- Sedans, SUVs, Trucks = eight (8) vehicles that meet the replacement criteria based on a combination of age, mileage, and idle time. Requested funding totals $481,690 and includes the following forecasted model types:

- Three (3) Tesla Model Y vehicles x $60,630 ($50,630 base vehicle + $10,000 upfitting) = $181,890.
- Four (4) Toyota Grand Highlander Hybrid LE vehicles X $56,200 ($46,200 base vehicle + $10,000 upfitting) = $224,800.
- One (1) Chevrolet or Ford EV Truck x $75,000 ($65,000 Base vehicle + $10,000 upfitting) = $75,000.

- Including a 10% contingency for price increases of $134,659.
- FY 2027 Total Police Fleet Replacement $1,481,249.

Operating Budget Impact: Routine replacement capital - operating costs to decrease due to decline in repairs and an increase in fuel efficiency.

Citywide Camera Infrastructure **$75,000**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Downtown Alpharetta
- Infrastructure and Facilities Maintenance.
- Transportation and Traffic

Description: This request funds the continued life-cycle management program for the City's camera infrastructure. Annual funding supports the planned replacement and management of system components, including cameras, servers, network equipment, and required professional services, allowing for predictable budgeting and reduced risk associated with aging technology.

Funding provided in FY 2025 and FY 2026 supported consolidation and replacement of the video management systems used to control cameras and capture video. Consistent with industry standards, a replacement schedule is being established for major system components: video management system servers (5 years), cameras (6 years), and network equipment (5 years).

Currently, approximately 80 percent of the City's cameras have reached end-of-life and are overdue for replacement. The FY 2027 funding of $75,000 will initiate an annual, phased approach to identifying and replacing the components most in need due to end-of-life conditions, technology obsolescence, or system expansion needs. For example, many of the cameras in City Hall are more than 11 years old, are no longer supported, present increased cybersecurity risk, and do not provide the analytics capabilities required today.

Operational Impact: Routine replacement capital – operating costs to decrease due to decline in repairs. Additional licensing fees will be incurred for camera expansion initiatives, but those costs will not be determined until the expansion plan is finalized.

Public Works

Milling and Resurfacing **$4,731,300 (TSPLOST 2; LMIG & LRA Grants)**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for the on-going maintenance of milling and resurfacing and preservation of city streets. Resurfacing city streets increases the life expectancy of the roads. Without resurfacing, roadways will deteriorate and be more costly to repair.

In FY 2027, the City will allocate funding in accordance with the Pavement Condition Index findings (performed by Spencer Consulting Group in FY 2025) and identify preservation techniques that will best extend the life of our roads. This includes a combination of surface coating techniques, milling and resurfacing, soil cement, etc. We have seen some decrease in cost per ton from $204/ton post Covid to $155/ton to $117/ton in FY 2026. Although costs have decreased, the cost per ton is still significantly higher than pre-Covid prices of $92/ton. Costs of mobilization, bonds, fuel, etc. have also increased.

- City has about 570 lane miles.
- Cost to mill and resurface a lane mile in FY 2026 was $154,000.
- $154,000 * 570 lane miles = $88 million.
- Resurface every 15 years = $5.9 million per year needed.
- Resurface every 20 years = $4.4 million per year needed.
- Resurface every 25 years = $3.5 million per year needed.
- Average asphalt per ton = $116.64

These numbers do not include reconstruction of roadways. We anticipate about $500,000 annually for reconstruction due to poor subgrades.

The goal is to continue and preserve our roads and streets to a PCI score of 70. The current overall average PCI for City roads is 78. This number may decrease depending on cost, funding, and other environmental factors. Staff is looking into performing more pavement preservation techniques to preserve and prolong the life expectancy of the roads. If we can extend the life of a road, more dollars can be spent on much-needed reconstruction of failing roads and provide a better service to our citizens. This will also help maintain the goal of keeping at the average PCI of 70 or above. The City may not be able to keep an average PCI score of 70 or greater if there is a decrease in funding or without an increase in funding if costs escalate in the future.

Funding requested herein consists of TSPLOST 2 funds ($3.2 million), Local Maintenance Improvement Grant (LMIG) funds (estimated at $731,300), and Local Roads Assistance Grant (LRA) funds (estimated at $838,403).

Operating Budget Impact: This program decreases roadway maintenance costs as the surface is less susceptible to potholes and road surface deterioration.

Traffic Striping and Signage — $320,000 (TSPLOST 2)

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for purchase of equipment and materials needed for the repair/replacement of traffic striping, raised pavement markers, and signage throughout the City. Repair/replacement of striping consists of refreshing the existing striping due to normal wear, replacement and/or installation of raised pavement markers and the restriping of roadways after milling and resurfacing. Repair/replacement of traffic signage consists of replacement of existing signage due to normal wear as well as damage. This request also includes equipment/materials needed for fabrication of signage.

This project is an allowable use of TSPLOST 2 funds.

Operating Budget Impact: Maintenance funding is included within this initiative.

Signalized Intersection Maintenance (incl. Traffic Control Equipment) — $210,000 (TSPLOST 2)

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for the continual maintenance, repair, and upgrading of signalized intersections, including traffic lights and mid-block crosswalks with flashing lights, throughout the City. This includes vehicular detection systems, pedestrian signals, signal heads, signal cabinets and components, signal communication systems, traffic light timing optimization, and upgrading crosswalks for pedestrians' safety improvements. This funding request also allows for the replacement of loops removed during the annual milling and resurfacing project.

Additionally, this request is for equipment necessary for traffic control throughout the City. This includes traffic signal communications, traffic monitoring, and temporary traffic control measures. Traffic signal communications enable the intersections to work together and smooth traffic flow. Traffic signal monitoring includes equipment such as traffic cameras. Temporary traffic control equipment includes devices used to detour or delineate traffic flow, such as cones, delineators and barricades, and variable message boards.

This project is an allowable use of TSPLOST 2 funds.

Operating Budget Impact: Maintenance funding is included within this initiative.

Bridge and Guardrail Maintenance — $250,000 (TSPLOST 2)

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for the continual performance of required repairs and maintenance measures identified by Georgia Department of Transportation (GDOT) inspectors during their biennial inspections of city-owned bridges. The most recent inspection report was received from GDOT in February 2024. Using available funding from previous years, a purchase order was issued to an engineering firm (Pond & Company), in September 2024, to prepare maintenance drawings for 10 bridges based on the GDOT inspection report. FY 2027 funding will be used for repair and maintenance of various bridges citywide in accordance with the findings of the GDOT inspection report.

This request also includes funding maintenance, such as painting, replacement, and upgrade, of existing guardrails throughout the City. Guardrails are crucial to keeping roadways safe by helping to prevent minor accidents from escalating to major accidents. One example of necessary guardrail maintenance is replacement of damaged guardrail on Westside Parkway near Sanctuary Parkway.

This project is an allowable use of TSPLOST 2 funds.

Operating Budget Impact: This program decreases bridge maintenance costs as it is less susceptible to surface and structure deterioration.

Traffic Calming Improvements — $50,000 (TSPLOST 2)

Fiscal Year 2027 Annual Action Plan:

- Transportation and Traffic

Description: This request is for the identification, design, and implementation of safety improvements primarily in neighborhoods and at high crash-rate intersections. Additionally, funds will enable staff to implement necessary traffic calming measures within the City. Projects may consist of roadway striping, signage such as radar signs, speed cushions, and channelization to mitigate existing safety deficiencies. The program will enhance public health and safety for users of the city's transportation system.

This project is an allowable use of TSPLOST 2 funds.

Operating Budget Impact: Maintenance costs will be dependent upon the improvements implemented.

Traffic Signal Pole Maintenance **$150,000 (TSPLOST 2)**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request funds the continued paint maintenance of the city's traffic signal mast arms and pedestrian signals. Painting will coincide with the expected 7–10-year lifespan of the current signal pole painting plus miscellaneous general maintenance and touchups. The average total cost per intersection is approximately $20,000 to $25,000.

The intersections that are recommended for pole painting in FY 2027 are as follows:

- Haynes Bridge Road & SR 120/Old Milton Parkway.
- Haynes Bridge Road & Alpha Crossing.
- Haynes Bridge Road & Academy Street.
- Haynes Bridge Road & Woodhaven Drive.
- Old Milton Parkway & Roswell Street
- Milton Avenue & Canton Street

The intersections that are recommended for pole painting, as available funding allows (e.g. current/future capital budgets) are as follows:

- Wills Road & Milton Avenue.
- SR 120 / Old Milton Parkway & Amber Park.
- Milton Avenue & Canton Street.
- Haynes Bridge Road & Morrison Parkway.
- Haynes Bridge Road & Mansell Road.
- Westside Parkway & Cumming Street.
- North Point Parkway & Preston Ridge Road.
- Westside Parkway & Colonial Drive.
- Westside Parkway & Sanctuary Parkway.
- Mansell Road & Old Alabama Conn.
- North Point Parkway & Mill Creek.
- North Point Parkway & Rock Mill Road.
- North Point Parkway & North Point Mall-North.
- North point Parkway & North Point Mall-South.
- Windward Parkway & Market Place.

This project is an allowable use of TSPLOST 2 funds.

Operating Budget Impact: Maintenance funding is included within this initiative.

Sidewalk and Brick Paver Maintenance and Repair **$750,000 (TSPLOST 2)**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Downtown Alpharetta

Description: This request is for the continual maintenance and repair of the city's sidewalk inventory.

The City has in excess of 235 miles of sidewalks (1.24 million linear feet) and 3,700 ADA handicap ramps.

In FY 2019 and FY 2022, the City contracted with Dynatest to complete a sidewalk inventory and evaluate sidewalk conditions. This list standardizes the evaluation process, provides a clear prioritized list of sidewalks needing repair, and ties sidewalk data into the city's GIS and asset management software. Types of repairs (cracking, trip hazard vertical displacements, and spalling) along with location (near schools and parks, along arterial roadways, in the downtown district, etc.) help determine the repair priority.

Currently, the City has approximately 68,341 linear feet of sidewalk rated as poor/very poor by the Dynatest assessment (roughly 5% of inventory). The estimated cost to demo and replace is approximately $3.75 million.

Currently, the City has approximately 1,323 ADA handicap ramps in need of repair/replacement to meet ADA requirements (roughly 36% of inventory). The estimated cost to demo and replace is approximately $3.3 million. Based on current contract pricing, the average cost to repair/replace the ramp is $2,500 per ramp.

Note, these dollar amounts are strictly for removal and replacement. If tree roots are to be cut, or traffic control is required, or backfilling of soil adjacent to the sidewalk is required, then the cost goes up. Work within subdivisions is far less expensive than working along major thoroughfares. Also, though crews and vendors have repaired sidewalk and handicap ramps throughout the City, any damaged sidewalk between the report and today is not included in any cost projections.

Funding will be requested annually with appropriations targeted at the most pressing repairs. This is a multi-year initiative aimed at maintaining our sidewalk asset inventory.

Due to the large number and complexity, the City contracts out some of these repairs. Work will occur in various locations throughout the city pursuant to the Dynatest findings.

This request also funds the maintenance and repair of brick paver sidewalks located in the downtown area. Maintenance and repairs included in this request would be re-setting, leveling, replacing, re-sanding, sealing, concrete base repair, soldier course/repair, and installation of concrete header curb as needed.

This project is an allowable use of TSPLOST 2 funds.

Operating Budget Impact: This program decreases sidewalk maintenance costs as it is less susceptible to surface and structure deterioration.

Stormwater **$1,500,000**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for stormwater design/studies, inspection, drainage maintenance, and pipe/structure repair and maintenance. Left unchecked, stormwater can contribute to costly flooding, erosion, and pollution issues that wreak havoc on our community.

Included in this request are various drainage, flood, and watershed studies that are required by state and federal regulations. Watershed studies identify capital projects to improve water quality in impaired streams. Additional studies include dam breach analysis, bacterial source testing, emergency planning and estimating damage, GIS maintenance, inventory updates, stream delisting, etc. These studies also identify future capital improvement projects or provide specific information that can be used by the city to meet regulatory compliance or further our service to our citizenry. This funding will also be utilized for the design of smaller drainage repairs, such as Harris Road drainage improvements, Haynes Bridge Road at Morrison Parkway drainage improvements, Pond retrofitting and dredging/permitting, etc.

The National Pollutant Discharge Elimination System (NPDES) Stormwater Permit requires Alpharetta to complete several inspections to protect our stormwater system. These inspections include site visits to private industrial facilities, private carwash and auto body repair shops, city ponds and stormwater management facilities, private ponds and stormwater management facilities, and city-maintained storm structures and pipes. These inspections help us identify maintenance repair work, help us prioritize our crews and CIP lists, and help us recognize private violations of the stormwater ordinance. This project includes hiring a private consultant to complete the inspections so that city staff can focus their efforts on planning, maintenance, and enforcement activities. Additionally, this request is for continual maintenance and small drainage maintenance work within the City.

One section of the work is pond and best management practices (BMP) maintenance, testing, sampling, work crew materials, education materials, and tree impediment maintenance. Pond and BMP maintenance in required by the Georgia Environmental Protection Division MS4 permit and includes ponds, bioretention, green infrastructure, pervious pavers, etc. Water quality education, education materials, and testing on streams and runoff is also required by the Georgia Environmental Protection Division. Sampling and testing include laboratory and field materials, testing, analysis, etc. Funding is included herein for Retention Pond Maintenance and improvements for Webb Bridge Park and North Park.

Another section includes small drainage repair and maintenance designs, crew materials such as rip rap, pine straw, grout, sod, etc., street sweeping, and removal of trees and shrubs blocking storm flow from or to pipes and structures or otherwise impeding water flow.

The final component of this request is for stormwater pipe and structure maintenance, repair, and replacement. This category includes unclogging pipes and structures filled with sediment and debris, repairing pipes by relining, contractual repairs to stormwater structures, and pipe replacement projects citywide in addition to targeted projects such as Alpha Loop offline detention, Wills Park stream restoration, Northwinds Culvert Design/Construction, multiple on- call stormwater improvement task orders, and drainage Improvements in Clairmonte subdivision. The contractual pipe un-clogging and structure repair will be throughout the city based on inspection results.

Annual funding requests are approximately $3-4 million based on forecasted needs over a 10+ year project horizon. That said, current funding levels within the Stormwater account total more than $3.2 million (as of January 2026) and the FY 2027 funding allocation was adjusted to $1.5 million. There is a companion unfunded request for the remaining $1.5 million needed to augment the annual stormwater funding.

Operating Budget Impact: This program decreases maintenance costs as flooding and erosion will be reduced.

Department Pool Vehicles; Qty: 2 (Fleet Replacement) **$95,000**

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of Public Works Department vehicles in accordance with the City's Fleet Maintenance and Replacement Policy ("Policy"). Vehicle replacement requests for the upcoming budget year meet the established criteria within the Vehicle Replacement Framework section of the Policy while all other years are based on a forecast of vehicles meeting the established criteria (e.g. based on forecasted utilization rates, etc.).

The vehicles identified below will be recommended for replacement based on the Vehicle Replacement Framework within the Policy which includes multiple criteria such as age/mileage (minimum of 12 years and/or 150,000 miles for this vehicle category), idle time/engine hours, maintenance cost analysis, reliability and downtime, safety issues, obsolescence, and mission suitability.

The tentative request for FY 2027 includes the replacement of the following:

- Unit 680 = 2010 Chevy Colorado extended cab compact truck (age = 16 years) with 53,019 miles as of February 2026. The replacement criteria are age and maintenance issues. Engine hours are not readily accessible from this vehicle year/make/model. This truck's lightbar has a wiring issue, which has caused internal malfunction in the wiring components. The department is utilizing this unit as a pool vehicle to avoid the use of the safety lighting equipment. This vehicle was purchased for $17,192. The repair was attempted in FY 2025, but it was unsuccessful. It is approximately $1,000 to repair the connections and a new lightbar is estimated to be around $2,500. To

avoid the cost of the repairs, the department has repurposed the vehicle until replacement.

- Unit 623 = 2009 Ford Ranger 4x4 super cab compact truck (age = 17 years) with 155,510 miles as of February 2026 and over 8,180 engine hours (equate to over 204,000 miles). The replacement criteria are age, mileage/idle time. This unit was purchased for $18,893. For FYs 2024-2026, maintenance costs totaled over $5,700. The unit is currently utilized by the right-of-way crew and the need to continuously utilize the tail gate handle has made the clasp wear out, creating a safety hazard in the event this becomes unstable and flies open.

The above is subject to change based on prioritization of need pursuant to the Policy (e.g. in the case of an alternate vehicle taking priority in the replacement framework due to mechanical failure, downtime, etc.).

Operating Budget Impact: This program reduces fleet maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service. Operational costs consist of maintenance, fuel, insurance, etc. and are currently budgeted.

F-150 Truck; Qty: 3 (Fleet Replacement) **$220,000**

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of Public Works Department vehicles in accordance with the City's Fleet Maintenance and Replacement Policy ("Policy"). Vehicle replacement requests for the upcoming budget year meet the established criteria within the Vehicle Replacement Framework section of the Policy while all other years are based on a forecast of vehicles meeting the established criteria (e.g. based on forecasted utilization rates, etc.).

The vehicles identified below will be recommended for replacement based on the Vehicle Replacement Framework within the Policy which includes multiple criteria such as age/mileage (minimum of 12 years and/or 150,000 miles for this vehicle category), idle time/engine hours, maintenance cost analysis, reliability and downtime, safety issues, obsolescence, and mission suitability.

The tentative request for FY 2027 includes the replacement of the following:

- Unit 726 = 2013 Ford F150 4x2 extended cab truck (age = 13 years) with 167,747 miles as of February 2026 and over 12,820 engine hours (equate to 320,500 miles). The replacement criteria are age, mileage, and engine hours. This unit was purchased for $24,863. In FYs 2024-2026, maintenance costs totaled over $6,200.
- Unit 843 = 2016 Ford F150 4x2 super cab compact truck (age = 10 years) with 150,000 miles as of February 2026 and over 10,224 engine hours (equate to 255,600

miles). The purchase price was $23,374. The replacement criteria are mileage and engine hours. In FYs 2024-2026, maintenance costs totaled over $11,300.

- Unit 547 = 2007 Ford F150 4x4 super crew cab truck (age= 19 years) with 70,000 miles as of February 2026 and over 5,616 engine hours (equate to 140,400 miles). The replacement criteria are age, mileage, and engine hours. This unit was purchased for $26,665. In FYs 2024-2026, maintenance costs totaled over $7,600.

The above is subject to change based on prioritization of need pursuant to the Policy (e.g. in the case of an alternate vehicle taking priority in the replacement framework due to mechanical failure, downtime, etc.).

Operating Budget Impact: This program reduces fleet maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service. Operational costs consist of maintenance, fuel, insurance, etc. and are currently budgeted.

F-250 Crew Cab Service Truck; Qty: 1 (Fleet Replacement) $80,000

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of Public Works Department vehicles in accordance with the City's Fleet Maintenance and Replacement Policy ("Policy"). Vehicle replacement requests for the upcoming budget year meet the established criteria within the Vehicle Replacement Framework section of the Policy while all other years are based on a forecast of vehicles meeting the established criteria (e.g. based on forecasted utilization rates, etc.).

The vehicles identified below will be recommended for replacement based on the Vehicle Replacement Framework within the Policy which includes multiple criteria such as age/mileage (minimum of 12 years and/or 150,000 miles for this vehicle category), idle time/engine hours, maintenance cost analysis, reliability and downtime, safety issues, obsolescence, and mission suitability.

The tentative request for FY 2027 includes the replacement of the following:

- Unit 714 = 2012 F-250 4x4 crew cab truck (age = 14 years) with 51,433 miles as of February 2026 and over 5,092 engine hours (equate to 127,300 miles). The replacement criteria are age, engine hours, and maintenance/repair issues. This vehicle was purchased for $54,900. The truck has an existing oil leak and various body damage. In FYs 2024-2026, maintenance costs totaled over $8,000, resulting in 60 days out of service. The department will research make/model options to reduce the size of vehicle purchased for more cost effective and fuel-efficient models instead of an F-250 unit. This unit was previously utilized as a plow truck; however, with the purchase of new plows, it would be more efficient to have a smaller unit as a replacement for the construction management team.

The above is subject to change based on prioritization of need pursuant to the Policy (e.g. in the case of an alternate vehicle taking priority in the replacement framework due to mechanical failure, downtime, etc.).

Operating Budget Impact: This program reduces fleet maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service. Operational costs consist of maintenance, fuel, insurance, etc. and are currently budgeted.

F-350 Crew Cab Service Bed Truck; Qty: 1 (Fleet Replacement) $85,000

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of Public Works Department vehicles in accordance with the City's Fleet Maintenance and Replacement Policy ("Policy"). Vehicle replacement requests for the upcoming budget year meet the established criteria within the Vehicle Replacement Framework section of the Policy while all other years are based on a forecast of vehicles meeting the established criteria (e.g. based on forecasted utilization rates, etc.).

The vehicles identified below will be recommended for replacement based on the Vehicle Replacement Framework within the Policy which includes multiple criteria such as age/mileage (minimum of 12 years and/or 150,000 miles for this vehicle category), idle time/engine hours, maintenance cost analysis, reliability and downtime, safety issues, obsolescence, and mission suitability.

The tentative request for FY 2027 includes the replacement of the following:

- Unit 544 = 2007 F-350 enclosed bed truck (age = 19 years) with 99,654 miles as of February 2026. Engine hours are not readily accessible from this vehicle year/make/model. The replacement criteria are age and maintenance/repair needs. This truck was purchased for $54,900. The truck has known cooling system issues that have attempted to be repaired; although unsuccessful. The unit does not have a working AC unit/heater. In FYs 2025-2026, maintenance costs totaled over $2,300. This unit has become a backup unit for crews due to its inefficient/uncomfortable work environment.

The above is subject to change based on prioritization of need pursuant to the Policy (e.g. in the case of an alternate vehicle taking priority in the replacement framework due to mechanical failure, downtime, etc.).

Operating Budget Impact: This program reduces fleet maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service. Operational costs consist of maintenance, fuel, insurance, etc. and are currently budgeted.

F-550 Crew Cab Truck; Qty: 2 (Fleet Replacement) **$200,000**

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of Public Works Department vehicles in accordance with the City's Fleet Maintenance and Replacement Policy ("Policy"). Vehicle replacement requests for the upcoming budget year meet the established criteria within the Vehicle Replacement Framework section of the Policy while all other years are based on a forecast of vehicles meeting the established criteria (e.g. based on forecasted utilization rates, etc.).

The vehicles identified below will be recommended for replacement based on the Vehicle Replacement Framework within the Policy which includes multiple criteria such as age/mileage (minimum of 15 years and/or 150,000 miles for this vehicle category), idle time, maintenance cost analysis, reliability and downtime, safety issues, obsolescence, and mission suitability.

The tentative request for FY 2027 includes the replacement of the following:

- Unit 128 = 2000 F-550 sign truck (age = 26 years) with 61,437 miles as of February 2026. Engine hours are not readily accessible from this vehicle year/make/model. The replacement criteria are age and reliability. This unit has a faulty battery cut off switch and still needs to be jump-started every time to start. This unit is 26 years old, which makes parts harder to find and can lead to longer down times. In FYs 2024-2026, maintenance costs totaled over $1,200. The department will research make/model options to reduce the size of vehicle purchased for more cost effective and fuel-efficient models instead of an F-550 unit.
- Unit 474 = 2005 F-550 dump truck (age = 21 years) with 49,799 miles as of February 2026. Engine hours are not readily accessible from this vehicle year/make/model. The replacement criteria are age, maintenance/repair issues, and down time. This truck was purchased in 2005 for $23,000. From FYs 2024-2026, maintenance and repair exceeded 50% of the cost of the unit, totaling $15,224. This unit was down for 44 days having its head gaskets replaced in FY 2024, totaling 56 days in the last 3 years.

The above is subject to change based on prioritization of need pursuant to the Policy (e.g. in the case of an alternate vehicle taking priority in the replacement framework due to mechanical failure, downtime, etc.).

Operating Budget Impact: This program reduces fleet maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service. Operational costs consist of maintenance, fuel, insurance, etc. and are currently budgeted.

Trailers; Qty: 1 (Equipment Replacement) **$30,000**

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the recurring replacement of trailers within the Public Works fleet. These replacements are based on age and/or maintenance/repair costs. These trailers are expected to last in excess of 10 years.

The tentative request for FY 2027 includes the replacement of the following:

- Unit 175= 2000 24' 20-ton trailer with air brake (age = 26 years).

Operating Budget Impact: This program reduces equipment maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service.

Asphalt Paver (Equipment Replacement/Upgrade) **$240,000 (TSPLOST 2)**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for the replacement of a Rubber Tire 2000 CAT 416C backhoe/loader with an asphalt paver. The existing backhoe/loader has traditionally been used to dig holes, haul dirt, move materials, lift heavy objects, remove debris from roadways and job sites, and load materials into dump trucks. However, Public Works has increasingly relied on other equipment to perform these functions.

Given current operational needs, the department is requesting to replace the backhoe/loader with an asphalt paver to better support ongoing asphalt repair and paving activities throughout the City. An asphalt paver would provide greater efficiency and effectiveness in maintaining roadways and infrastructure and would be a more beneficial asset to meet the department's current and future needs.

This project is an allowable use of TSPLOST 2 funds.

Operating Budget Impact: This program reduces equipment maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service. Operational costs consist of maintenance, fuel, etc. and are currently budgeted.

Winter Weather Equipment Storage **$45,000**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for the purchase of Winter Weather Equipment that is utilized within the Public Works fleet.

FY 2027 request is for Winter Weather Equipment. We have purchased four (4) F-750s with salt spreader attachments to be utilized in anticipation of winter weather needs. We

are requesting funds to purchase stands for the spreaders when they are not in use, which will significantly increase the ease of use for the spreaders and the amount of space needed to store the spreader.

Currently the four spreader inserts for the F-750s are stored by means of chains and hooks. The chains are connected to the I-beams of the pole barn located at Public Works. This method of storage was never meant to be permanent and causes several issues.

- Currently, with the chain and hook system, installation and removal of a spreader take at least three people and a piece of equipment.
- The spreaders have received damage due to dragging the ground and using heavy equipment to hoist them in place, etc. The I-beams for the pole barn were never designed to have the extra weight of four spreaders hanging from them.

The cumbersome and time-consuming problem of removing, hanging, or un-hanging and installing is not the best practical way of storing the spreaders when not being utilized. The proposed stands mount to the spreader and when backing up under the spreader, the legs fold up the same way an ambulance bed would, allowing you to drive up under the spreader to load it. Same as unloading, the legs fold out and you drive the truck out from underneath the spreader. With the attachment of these stands, one to two people maximum can load and unload a salt spreader safely. The stands will attach to the spreader and always stay on them. Additionally, this request also includes the annual cost of the Precise software utilized for winter weather activity usage and the tracking of materials utilized and location routes. The estimated cost of these combined purchases total $45,000.

Operating Budget Impact: This program reduces equipment maintenance costs and increases utilization rates as the attachments are stored more efficiently.

Facility Condition Assessment (Phase 1) Implementation **$1,150,000 (capital)**
Fiscal Year 2027 Annual Action Plan: **$2,275,000 (financing)**

- Infrastructure and Facilities Maintenance

Description: In Fall 2024, the City of Alpharetta partnered with McKinstry to conduct a comprehensive Facility Condition Assessment (FCA) of 60 city-owned buildings. This effort surveyed over 4,040 individual assets with the goal of understanding current infrastructure conditions, anticipating capital needs, and setting the foundation for long-term asset management. The assessment offers a clear, data-driven path to proactive maintenance planning and highlights opportunities for efficiency through a potential Energy Savings Performance Contract (ESPC).

The assessment project goes beyond a one-time report. McKinstry deployed the Reveal Capital Planning Tool, a cloud-based dashboard that centralizes the entire asset inventory and allows city staff to:

- Prioritize investments using condition, cost, risk, and lifecycle data.
- Simulate funding scenarios with a dynamic budget planning module.
- Update capital forecasts in real time as assets are replaced or repaired.

- Drill down to individual equipment details across all 60 facilities

Staff are actively using the Reveal Capital Planning Tool, and upcoming FY 2027 CIP reflects these values.

McKinstry has identified $3.8 million in facility repairs/improvements for items that have reached (or are approaching) the end of their useful life and are in need of replacement (the "Phase 1" project). These assets include HVAC, thermostats, lighting, fixtures, building envelope, etc. Replacement of these items is forecast to generate over $4.9 million in energy savings over their average useful lives (approx. 20-years). Staff is requesting to move forward with the ESPC which involves a guaranty of energy savings from the vendor.

Details include:

- ESPC Phase 1 Project Costs: $3,760,000
- Funding Options:
    - Capital/One-Time Funding = $1,485,000
        - $185,000 (rebates/credits identified by McKinstry)
        - $150,000 (existing FY 2026 Appropriations)
        - $1,150,000 (FY 2027 capital funding request)
    - Capital Lease Funding = $2,275,000 ($180,000 lease payment in year 1)
        - Staff is targeting a 15-year term (max available; assets avg 20-year life) and expects the capital lease payment to be fully offset by the guaranteed energy savings with a net gain of $515,000 in energy savings over a 20-year term (factoring in lease interest expense). Specifically, the forecasted lease payment in year 1 (FY 2028) is estimated at $180,000 and will be fully offset through reductions in utility expenses (primarily electricity) with an associated guarantee of those savings by McKinstry through ESPC.

Operating Budget Impact: The project will decrease future operating costs by identifying deficient equipment and identifying needs for energy-saving practices related to facilities.

Police Headquarters (Facility Maintenance/Improvements) $200,000

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community

Description: This request is for renovations, repairs, and upgrades to the Police Headquarters. The building has seen a staffing increase and is starting to show its age.

FY 2027 funding will be for the remodeling of all bathrooms within the Police Headquarters. The current bathrooms at Police Headquarters are original to the building's construction and need upgrading/remodeling due to aged, deteriorated counters, sinks, partitions, floors, and fixtures. The remodel would not include 911 bathrooms; these were included as part of the 2017 Police Headquarters expansion. This request does include replacements and upgrades to interior/exterior finishes, plumbing upgrades, electrical upgrades, doors, windows, etc. based on the 2025 McKinstry facility condition assessment.

Operating Budget Impact: This program decreases facility maintenance costs due to decline in repairs.

Fire Facilities (Facility Maintenance/Improvements) $40,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for the renovation of bathrooms, kitchens, flooring, lighting, appliances, ceiling fans, etc. at various Fire Stations within the City. The renovations will be accomplished over many years.

Tentative improvements in FY 2027, subject to available funding, include the following for Station 84: new flooring, exterior door and frame replacements, replacement ceiling fans, replacement appliances. Improvements will be funded within other stations as well if residual funding is available.

Operating Budget Impact: This program decreases maintenance and utilities costs (increased energy efficiency).

Fire Facilities (Roof Repairs/Replacements and Wall Restoration) $90,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for roof repair/rehab/replacement at multiple Fire facilities.

The FY 2027 request is for the replacement of the shingled roof segments at Fire Stations 85 and 86. Fire Stations 85 and 86 were constructed with asphalt shingle roofs with an expected lifespan of 20 to 25 years. Recently, both roofs have had multiple leaks repaired and have started showing signs of age and deterioration. Currently, the age of the existing roofs is 20 years for both Fire Station 85 and Fire Station 86. Since both roofs are asphalt shingle roofs and are both showing signs of age with current condition and leaks, it is recommended to replace both roofs with a 50-year architectural shingle roof.

Operating Budget Impact: This program decreases facility maintenance and utilities costs (increased energy efficiency).

City Hall (Facility Maintenance/Improvements) $35,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for on-going interior maintenance, including but not limited to replacing cabinetry in multiple breakroom floors, pressure washing and sealing brick sidewalks, painting walls and trim, etc. In addition, repairs to the custom stained moldings throughout the main floor which will require procurement of a third-party vendor to perform the work. The FY 2027 funding will go towards upgrades to cabinetry, interior painting, and interior/exterior wood repair and re-staining.

Operating Budget Impact: This program decreases facility maintenance costs.

Recreation and Park Facilities (Facility Maintenance/Improvements) $50,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for recurring maintenance and repairs to the Recreation and Park facilities to improve the functionality and esthetics.

FY 2027 funding priorities include:

- Repairs to Log Cabin – Removing rotten rear elevation logs, then replacing them with block foundation with a matching stone exterior. Light power washing of the exterior and applying a clear coat with TWP stain. The TWP stain protects the wood from UV damage, moisture, mold, etc., enhances and preserves the natural wood appearance, and repels water and resist surface damage.

Operating Budget Impact: Facility maintenance costs to decrease due to decline in repairs.

Parking Garages (Facility Maintenance/Improvements) $125,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for general maintenance of the two parking garages, 92 Milton Avenue and City Center. Garage maintenance work generally consists of painting (e.g. stairway handrails), washing windows, pressure washing, inspection of structural components and repair as needed, etc.

FY 2027 funding will cover the following repairs noted in the 10-year plan and any unrepaired issues identified in inspections.

- City Center Garage
  - Replace bearing pads and raise affected DT beams.
  - Repairing standing water problems in the southern stairwell. This may require adding supplemental floor drains in locations of excessive ponding.
  - Clean and coat exposed steel connection elements with a corrosion-inhibiting coating system.
  - Inspections.
- 92 Milton Avenue Garage
  - Clean, prep, and apply 2 coats of epoxy or urethane to stairs and landings.
  - Clean, prep and paint the stair handrails.

Other repairs dependent on funding is waterproofing the elevator pits in the City Center parking garage and adding a louvered cover on the exterior wall at the 2nd level to help prevent water intrusion into the existing elevator pits.

Operating Budget Impact: Facility maintenance costs decrease due to decline in repairs.

HVAC Replacements (Facility Maintenance/Improvements) $165,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for the replacement of HVAC units for all City-maintained facilities. The useful life expectancy for HVAC units is 15 years and a lot of the units serving facilities within the City are approaching or have exceeded the life expectancy.

FY 2027 replacements include multiple units at the Wills Park Recreation Center (units over 20 and 25 years old). The request also includes funding to tackle unexpected HVAC equipment failures requiring repair/replacement.

Operating Budget Impact: This program decreases maintenance and utilities costs (increased energy efficiency).

Generator Replacements (Facility Maintenance/Improvements) $100,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: This request is for replacement of generators for city facilities. The new generators will be natural gas instead of diesel. A generator's typical useful life span is 20 years old.

The FY 2027 request is for replacement of the generators at 1475 Mid Broadwell Road (Fire Station 85) and 3275 Kimball Bridge Road (Fire Station 86). Both units are in excess of 19-years old.

Operating Budget Impact: Equipment operational costs (natural gas; preventative maintenance) are estimated to be substantially similar to costs for the current equipment and are included within the base operating budget. That said, overall equipment maintenance costs are anticipated to decrease due to a decline in repairs.

Design Services (Public Works) $40,000

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for various design services associated with minor projects unable to be completed by city staff. Such services include structural designs and/or evaluations, sub-surface geotechnical investigations, miscellaneous right-of-way/easement research. Utilizing experts in various fields enables city staff to make the appropriate decisions related to resolving construction issues. Additionally, the information gathered by the design professionals allows staff to properly design or address issues in the field.

Operating Budget Impact: N/A.

Recreation, Parks & Cultural Services

Park Repairs/Improvements $200,000

Fiscal Year 2027 Annual Action Plan:

- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: This funding is for general park repairs and improvements for projects that are less than $50,000. This account allows the department to address immediate grounds, sidewalks, and amenity repairs and replacement throughout the parks system. As an example, FY 2026 funds were used for:

- Brooke Street Park - irrigation installation.
- Multiple Parks – sidewalk repairs/replacements.

This account is crucial to the Department's ability to respond to the needs and repairs as they arise throughout the year.

FY 2027 funding will be targeted at the following improvements:

- Wills Park ball field fence replacement ($50,000): The fence replacement provides improved public safety, addresses safety concerns, helps to preserve existing city facilities, equipment, and infrastructure, etc.
- Park concrete/sidewalk repairs and replacement ($75,000): Park safety inspections have identified that the condition of concrete areas and sidewalks around the park system needs to be addressed. Many of these issues are occurring due to ground settling and root intrusions into these areas. This damage has created tripping hazards for park users. In years past, the park staff has utilized concrete grinding to address some areas. However, this isn't a long-term solution.
- Laser grading of softball fields ($75,000): The laser grading provides improved player safety, enhanced drainage, reduced game cancellations and improved playability and performance.

Operating Budget Impact: Routine replacement capital - operating costs to decrease due to decline in repairs.

Park Security Repairs and Improvements $60,000

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- The Alpha Loop and Greenway
- Downtown Alpharetta
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: This scope includes adding security cameras in strategic locations; call box repairs and/or installation of new boxes; and, if funding is available, installation, repair, and replacement of automatic locks on restroom doors throughout the park system.

The Police Department has been working with the Recreation, Parks & Cultural Services Department to develop a surveillance camera solution for our park system. Union Hill,

Webb Bridge, Innovation Academy, and Wills Park have been identified as the highest priority. The cameras would be able to tie into existing camera infrastructure currently managed by the Police team.

The FY 2027 funding request, coupled with existing appropriations, will fund:

- Park security camera installation (phase 2) ($60,000) to add security cameras in strategic locations. This project will enhance public safety, deter vandalism and criminal activity, support law enforcement response, and protect City assets. The additional cameras will improve overall monitoring of high-use and vulnerable areas within the park system.
- This request provides funding for the repair, maintenance, and potential replacement of emergency call boxes located along the Greenway. The City currently maintains (25) call boxes, the majority of which were originally installed in 1997–1998. An additional eight (8) units were installed in 2018.

  Ongoing maintenance includes annual battery replacements for all units. Batteries cost approximately $104 each, with labor billed at approximately $120 per hour. Annual battery replacement and related maintenance costs range between $5,000 and $10,000.

  Due to the age of many existing units, replacement may be necessary. The cost of a new call box is approximately $10,000 per unit.

  In April 2026, the Information Technology Department and the Recreation, Parks & Cultural Services Department will meet to evaluate replacement and upgrade options for all call boxes, including those along the Greenway. Funding requested will support both immediate maintenance needs and anticipated system upgrades or replacements.
- If funding is available, then work will include installation, repair, and replacement of automatic locks on restroom doors throughout the park system. In recent years, the homeless population has been residing in outside park restrooms. By adding/maintaining the automatic locks, it will address this ongoing issue.

Operating Budget Impact: Routine replacement capital - operating costs to decrease due to decline in repairs.

Park Trail Maintenance $25,000

Fiscal Year 2027 Annual Action Plan:

- Recreation, Parks, and Culture

Description: Park Trail Maintenance (not Greenway Trail) represents resurfacing of park system trails (whether the trail is asphalt, concrete, or trail mix surface). This initiative will formalize a schedule for the repairs and replacement in our parks. Asphalt trails that are in wooded areas need to be paved every eight years to avoid safety issues for our users. In addition, heavy-use soft surface trails in parks such as Webb Bridge Park need restoration every 8 years.

The FY 2027 request includes funding for the surface restoration of the 0.2-mile concrete trail at Cogburn Road Park. The original trail was added in 2007. The work will include milling and repouring the surface. In addition to the work at Cogburn Road Park, available funds will be used for minor asphalt/trail mix/concrete trail repairs after fallen trees or tree root intrusions/lifting.

Operating Budget Impact: Routine replacement capital - operating costs decrease due to decline in repairs.

Wood Light Pole/LED Replacement Initiative **$450,000 (2022 Parks Bond)**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: The City's athletic fields include a mixture of wooden and concrete light poles. The wooden poles (46 in total) are near or have exceeded their life expectancy and should be replaced with concrete/metal poles to avoid potential life-threatening occurrences if a pole were to fail.

During FY 2026, the City issued an RFP for replacement of the wooden poles, as well as replacement light fixtures (LED) on all poles (wooden and otherwise), at North Park which is funded partially through a Land/Water Conservation Fund Grant. This initiative will be completed during FY 2026 and will result in replacement of 24 of the City's current 46 wooden light pole inventory.

All remaining wooden light poles (22) are located at Wills Park (installed in the early 1970s) and contain 110 light fixtures as follows:

- Field #1 = 6 wooden poles with 23 fixtures.
- Field #2 = 4 wooden poles with 18 fixtures.
- Fields #1 and 2 = 1 wooden pole with 6 fixtures and 1 concrete pole with 6 fixtures.
- Field #3 = 4 wooden poles with 10 fixtures.
- Field #4 = 7 wooden poles with 47 fixtures.

The FY 2026 capital budget included an appropriation for replacement of the wooden light poles and fixtures for Wills Park Field 1. This budget request will provide funding to replace the wooden light poles and remaining fixtures for Wills Park Field 2-4. All fields will be competitively bid together to obtain the most competitive pricing. This project was originally anticipated (FY 2026 CIP) to be funded in phases through FY 2028 but is being advanced due to competitive market pricing currently available, as highlighted in the recent North Park lighting replacement RFP.

Background on light fixtures: The City's athletic lighting primarily consists of a form of metal halide lights. These lights are expensive to operate, expensive to maintain and create light pollution. New LED lights would improve the playability for our participants, reduce the excessive glare, and cost much less to operate and maintain. The City is averaging

$140,000 in operational costs for its outdoor athletic lighting each year (bulb replacement and energy charges). With these upgrades, there could be a 50% reduction in the overall cost to operate the lights simply by not having to replace the fixtures as frequently.

Funding is provided through the 2022 Parks Bond Fund (investment earnings above arbitrage reserve).

Operating Budget Impact: Routine replacement capital - operating costs are projected to decrease by 50%-75% due to a significant decline in repairs coupled with energy savings through the conversion to LEDs.

Playground Equipment Replacement $50,000

Fiscal Year 2027 Annual Action Plan:

- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: One of our park system's favorite amenities is our playgrounds. This initiative is planned around the premise of keeping the City's playgrounds in compliance with industry safety standards. Even though materials last longer, the recommended replacement schedule for a playground is 25-30 years. The is mainly due to the ability to order replacement parts. In addition, as the warranty expires on equipment, funds need to be available to replace if repairs are not possible. Finally, infrastructure repairs and enhancements for drainage and fall impact must be addressed every five to ten years.

The FY 2027 funding request will support the replacement and upgrade of aging and damaged playground amenities at Cogburn Road Park. These improvements will enhance safety through updated equipment, improved borders, and drainage enhancements, while also increasing accessibility, durability, and long-term usability for children and families.

Operating Budget Impact: Routine replacement capital - operating costs decrease due to decline in repairs.

Park Shade Structure and Awning Replacements $30,000

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: This request is for the replacement of shade structures and dugout covers throughout the park system. Shade structures/dugout covers reduce exposure to harmful ultraviolet rays, provide protection from the elements, keep the area cooler, protect the equipment, and increase the comfort level for participants and visitors. The shades will be replaced as they begin to fade or tear, improving the functionality and esthetics.

The FY 2027 funding request is for the replacement of the existing shade fabric as well as the painting of the support post for Wills Park: two (2) at Tennis Courts, five (5) at Fields 1-4, and one (1) at the T-Ball fields.

Operating Budget Impact: Maintenance costs to decrease due to decline in repairs.

Athletic Court Resurfacing $300,000

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: This request supports the recurring maintenance and repair of the City's outdoor athletic courts. The tennis, pickleball, and basketball courts are among the park's most heavily used amenities, serving hundreds of participants each day. For player safety and optimal play conditions, industry standards recommend resurfacing or re-coating athletic courts on a five (5) year cycle.

The FY 2027 funding request is for the replacement of court surfacing at the Wills Park Tennis Center ($300,000). The existing court surfaces have deteriorated beyond the point where routine re-coating is effective. Based on evaluations from court maintenance vendors, asphalt milling, repair, and full surface replacement are recommended.

Operating Budget Impact: Routine replacement capital - operating costs decrease due to a decline in repairs.

Fountain and Pool Repairs (new to CIP) $75,000

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This capital request is for the replacement of critical components and pumps serving the City Center, Town Green, and Pocket Park fountains, as well as the Wills Park Pool.

The FY2027 funding request will support repairs to the Town Green Fountain and ongoing maintenance of other City fountains, as well as the Wills Park Pool, to ensure continued reliable operation and functionality.

Recently, one of the pool's water features required replacement due to age and wear. As additional features continue to age, further maintenance and repairs will be necessary. In addition, the pool's chlorine pumps are critical to daily operations and subject to failure over time; timely replacement is essential to maintaining proper water quality and keeping the pool operational.

Operating Budget Impact: This project is expected to have minimal operating impact. Replacing aging pumps and components will reduce the likelihood of equipment failures, emergency repairs, and unplanned downtime. The upgrades may result in modest reductions in maintenance costs and staff time while improving system reliability and extending the useful life of the fountains and pool assets.

Alpha Loop Maintenance and Repair (new to CIP) **$50,000**

Fiscal Year 2027 Annual Action Plan:

- The Alpha Loop and Greenway
- Recreation, Parks, and Culture

Description: As the Alpha Loop continues to serve as a key component of the City's park system, ongoing infrastructure repairs and enhancements are necessary to address normal wear associated with age and heavy public use. The Alpha Lopp is almost five years old. Anticipated needs include concrete repairs, lighting repairs, electrical repairs at crosswalk locations, drainage improvements, and supplemental landscaping.

For example, approximately 200 feet north of the Neon Garden Bridge, recurring drainage and erosion issues cause soil washout along the sidewalk during even minor rain events, creating muddy conditions and potential safety hazards for pedestrians.

Proactively addressing these maintenance items will reduce long-term repair costs, enhance public safety, and preserve the aesthetic quality of the corridor. Additionally, the department continues to receive requests for new amenities along the Alpha Loop, reflecting its growing popularity and importance to the community.

Operating Budget Impact: Proactive repairs will help minimize unplanned maintenance, reduce long-term operating costs, and support public safety and corridor appearance.

Tree Maintenance, Planting, and Removal in Parks **$125,000**

Fiscal Year 2027 Annual Action Plan:

- Recreation, Parks, and Culture

Description: This request is for the removal of dead or dying trees throughout the park system. By removing the dead or dying trees, we are reducing safety hazards, avoiding pest infestations and spreading infections, and improving the appearance of the parks. Tree removal services have averaged $180,000 per year for the past several years. Additionally, staff has added to the scope the purchase/planting of replacement trees. That said, staff have several other accounts they can leverage of tree maintenance/removal including Greenway maintenance, which allows for the $125,000 request included herein.

Operating Budget Impact: Reduces pressure on operating budget as an alternate source of funding is available to meet this need, which is often a public safety priority that takes precedent over all other potential uses.

General Equipment Replacement (Recreation) $62,500

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of one 2013 John Deere 6X4 Gator and one 2014 Kubota RTV. Replacement is requested due to age, hours of use, and estimated repair cost.

This equipment is utilized daily in support of ongoing operations, resulting in rapid accumulation of usage hours and/or mileage. Due to the frequency and intensity of use, the units have reached a high number of operating hours/miles.

As a general rule, once equipment exceeds approximately 5,000 operating hours, repair and maintenance costs increase significantly. At this stage, components experience greater wear and tear, breakdowns become more frequent, and downtime impacts productivity and service delivery. Continuing to invest in repairs beyond this threshold is no longer cost-effective and can lead to operational disruptions.

- 2013 John Deere 6X4 Gator, RP0619, is used by the Equestrian Staff. Depending on hours of use, the effective life is 10 years. This unit has 4,298 hours. During FY 2025 – FY 2026, repairs have cost more than $2,400.
- 2014 Kubota RTV, RP7541, is used by Greenway staff. Depending on hours of use, the effective life is 10 – 12 years. This unit has 7,813 hours. During FY 2025 – FY 2026, repairs have cost more than $5,015.

Replacing this equipment at this time will reduce escalating maintenance expenses, improve reliability, and ensure continued efficient service delivery.

Operating Budget Impact: Routine replacement capital - operating costs to decrease due to decline in repairs.

Alpharetta Public Arts Initiative (Outdoor On-Loan Sculptures) $45,000

Fiscal Year 2027 Annual Action Plan:

- Downtown Alpharetta
- Communications that Connect
- Economic Development
- Recreation, Parks, and Culture

Description: This request is for funding of public arts programs on an alternate year basis through Arts Alpharetta which is a nonprofit organization dedicated to bringing quality arts to Alpharetta. Arts Alpharetta, along with City staff, have several public art projects in-process. These projects include an Outdoor Sculpture Exhibit Contract, an on-loan, permanent, or lease-to-own installation in downtown Alpharetta/Art Walk Brochure. The City of Alpharetta contracts with Arts Alpharetta to locate, curate, install and deinstall on-loan sculptures on a bi-yearly rotation. The number of sculptures varies from 5-7 depending on the rental cost and install logistics for each piece. The project budget is $90,000 but split between two fiscal years at $45,000 per year. This is a continuation project that will require the installation of new outdoor art exhibits every two years. Art installations will be in place for an average of 1.5 – 2 years, subject to available funding.

The program supports the City's vision of promoting and supporting Arts & Culture through Public Art; and 2025 City Council Priorities and Annual Action Plan supporting: Downtown Alpharetta, Strategic Growth and Redevelopment, Communications that Connect, Economic Development, and Recreation, Parks & Culture.

The current exhibit is installed with 10 new sculptures for FY 2024 - FY 2026 Bi-Yearly Contract. The new exhibit will start being installed in FY 2027 and go through FY 2029. Staff and Arts Alpharetta are currently in the process of curating the next round of sculptures.

The City of Alpharetta, Arts Alpharetta, and the Alpharetta Convention & Visitors Bureau partner on an Art Walk Brochure that is available for locals and promoting tourism to the City.

The services provided by Arts Alpharetta, Inc. provide turn-key service for all aspects of the project. Services include all correspondence with artists (ranging from the online call for artists, to rental agreements, and payments), duration, installation, and deinstallation of the art, and marketing. Although Arts Alpharetta, Inc. is contracted for the Outdoor-On-Loan Sculpture Exhibit, the non-profit organization spends all funding on the project expenditures. Arts Alpharetta volunteers their time to the project.

The agreement is valid for a period of (2) two years and will need to be approved with each new exhibit, with the exhibit on display for calendar years 2024-2026, after which the City and Arts Alpharetta, Inc. may discuss a fifth Outdoor-On-Loan exhibit for Fiscal Years 2027-2029, calendar years 2026-2028.

Operating Budget Impact: In addition, staff has recognized there is a need to include funding for ongoing maintenance and repair for curated public art, whether the sculpture be a permanent City fixture or part of the on-loan rotational exhibits. This is due to the unforeseeable damage that could happen (and has happened) to art when on public display. When such instances occur, the City must repair and restore the art to its original state. To proactively plan for such occurrences, staff requests $10,000 annually to offset repair and maintenance costs for public art.

Public Art in the Parks $20,000

Fiscal Year 2027 Annual Action Plan:

- Communications that Connect
- Recreation, Parks, and Culture

Description: The City of Alpharetta has invested a great deal of money into the Parks System. With the last two bond referendums, the City has been able to purchase additional parkland for new parks and enhance the existing parks. To remain a vibrant and exciting park system, the need for art throughout the parks has been identified. Several pieces have been installed (Wills Park, Encore Park, and Brooke Street Park).

This program supports the City's vision of promoting and supporting Arts & Culture through Public Art. This request will allow for the strategic placement of public art in locations that are frequently visited and enjoyed by Alpharetta citizens. Our first priority

is Wills Park and the new spine walkway. Next would be Webb Bridge Park and the Alpharetta Greenway. Future opportunities include crosswalk murals, sculptures, retaining wall murals, dog park entrances, park gateway entrances, or other art installations that might enhance the quality of life for Alpharetta residents and visitors alike.

Examples include: The relocation of the "Torqued Chroma" sculpture to Webb Bridge Park by the new soccer fields, meeting the goal of the placement of more art on the east side of Alpharetta, the Park Bond Projects and the Alpharetta Greenway.

For FY 2027, the projects include updating the "Circle of Friends" sculpture at the East Gateway Entrance of the new Wills Park Spine and a Mural on the new wall at Wacky World in Wills Park.

The benefit of public art is contagious. To remain a vibrant and exciting community, we must invest in public art, public murals and cultural pieces. This request would place artwork in locations that can be enjoyed by our citizens up close and personally. We are seeing a growing number of citizens using our parks and additional public art would add greatly to their experience.

The goal of the capital account is to accrue funds over several years to support a project or to provide matching funds for an organization or grant. This allows city staff to plan effectively and coordinate public art with ongoing citywide development.

Operating Budget Impact: New art installations will incur maintenance costs but will not be determinable until the art investment decision is made (e.g., mural vs. statue, etc.).

Public Art Fund by Developers (City Property) **$10,000**

Fiscal Year 2027 Annual Action Plan:

- Downtown Alpharetta
- Communications that Connect
- Recreation, Parks, and Culture

Description: As development continues throughout the City of Alpharetta, the developers are required to set aside funds for public art that is on city property (right-of-way or easements). The issue is that the amount of the funds set aside is not enough to purchase and install large statement pieces. This fund would provide additional funds for larger pieces of artwork at key locations and intersections. Example, Alpharetta Off-Leash was required to give the City $15,000 for artwork to go at the corner of Old Milton Parkway and Main Street. For a piece of artwork of appropriate size and stature, $25,000 is estimated. We anticipate this happening in additional developments throughout the City.

This program supports the City's vision of promoting and supporting Arts & Culture through Public Art; and 2025 City Council Priorities and Annual Action Plan supporting: Downtown Alpharetta, Strategic Growth and Redevelopment, Communications that Connect, Economic Development, and Recreation, Parks & Culture.

Once sufficient funding is accumulated in the account, this will allow for the purchase of public art pieces that are suitable for various locations.

Currently, there is a Public Art Plan in the works to help with the corner of Old Milton Parkway and Main Street along with all prominent locations.

In addition, Community Development is designing an Alpharetta gateway piece on the opposite corner of Old Milton Parkway, and it was recommended to allow this to be approved before moving forward with a Public Art piece, so the two complement each other.

The benefit of public art is contagious. To remain a vibrant and exciting community, we must invest in public art, public murals, and cultural pieces. This request will match development dollars for more impactful and meaningful pieces of public art, murals, and cultural pieces.

Operating Budget Impact: New art installations will incur maintenance costs but will not be determinable until the art investment decision is made (e.g., mural vs. statue, etc.).

Public Art for City Projects **$25,000**

Fiscal Year 2027 Annual Action Plan:

- Communications that Connect
- Recreation, Parks, and Culture

Description: Working closely with the Economic Development and Community Development Departments, this continuous request will allow for the purchase and placement of public art, murals, and other cultural pieces throughout the City of Alpharetta. Currently, there are several locations along the existing Alpha Loop that have poured bases for pieces of art, but no funds exist for the placement of actual art.

The program supports the City's vision of promoting and supporting Arts & Culture through Public Art; and 2025 City Council Priorities and Annual Action Plan supporting: Downtown Alpharetta, Strategic Growth and Redevelopment, Communications that Connect, Economic Development, and Recreation, Parks & Culture.

The Arts Center is working on a partnership with the Alpha Loop Foundation and Arts Alpharetta. The first step is planning the locations and scale of each art piece. This will take place from December 2026 to February 2027. Then the Alpha Loop Foundation will begin fundraising for all the pieces along the Alpha Loop. The City will utilize these capital funds to seed the projects and/or pay for mural supplies, sculpture installations, etc.

For FY 2027, the projects include the Alpha Loop Tunnel Mural, the wall near Webb Bridge Park, and/or the wall at Kimball Bridge Road bridge.

The benefit of public art is contagious. To remain a vibrant and exciting community, we must invest in public art, public murals, and cultural pieces. We require developers to put artwork in their developments because of the value the artwork brings to the community. This request will allow us to begin backfilling artwork to keep Alpharetta on the cutting edge.

The goal of the capital account is to accrue funds over several years to support a project or to provide matching funds for an organization or grant. This allows city staff to plan effectively and coordinate public art with ongoing citywide development.

Operating Budget Impact: New art installations will incur maintenance costs but will not be determinable until the art investment decision is made (e.g., mural vs. statue, etc.).

Haynes Bridge Road Park Restroom $500,000 (Parks Impact Fees)

(Impact Fees of $459,500; General Sources of $40,500)

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: Currently, at Haynes Bridge Road Park, visitors only have access to a Port-a-John. This access park was opened in 1997. Funds were limited and plans were to construct a restroom later. Although the need for a permanent restroom at this facility is not specifically noted in the 2018 Alpharetta Recreation and Parks Master Plan, additional restrooms at the access points are the most requested improvement made by greenway users.

A pre-cast-type restroom (like the one at Windward Community Park) is preferred. Due to current flood plain constraints, the project will entail more site work prep, design, and surveying than routine pre-cast restroom installations. Approximately 100' of sewer lines will need to be installed. A waterline will have to be bored under Haynes Bridge Road and a new meter installed for connection to existing waterlines. Funding is proposed through Impact Fees (Parks) of $459,500 (91.91% is impact fee eligible) and $40,500 through general sources (Capital Project Fund).

Operating Budget Impact: Maintenance (including janitorial) and utility costs are estimated at a minimum of $1,000 annually.

Marconi Drive Park Restroom $500,000 (Parks Impact Fees)

(Impact Fees of $459,500; General Sources of $40,500)

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: Currently, at Marconi Drive Park, visitors only have access to a Port-a-John. This access park was opened in 2011. Funds were limited and plans were to construct a restroom later. Although the need for a permanent restroom at this facility is not specifically noted in the 2018 Alpharetta Recreation and Parks Master Plan, additional restrooms at the access points are the most requested improvement made by greenway users.

Based on the current market cost to install a pre-cast restroom to match the current park inventory, the estimated cost is $500,000 including sewer and water connections as well as design. Funding is proposed through Impact Fees (Parks) of $459,500 (91.91% is impact fee eligible) and $40,500 through general sources (Capital Project Fund).

Operating Budget Impact: Maintenance (including janitorial) and utility costs are estimated at a minimum of $1,000 annually.

Marietta-Roswell St. Corner Park **$250,000 (Parks Impact Fees)**

Fiscal Year 2027 Annual Action Plan:

- The Alpha Loop and Greenway
- Downtown Alpharetta
- Recreation, Parks, and Culture

Description: This funding is for construction of a passive park and Alpha Loop connection at the city-owned land at 114 Roswell Street. Design was funded as part of the FY 2026 capital budget.

The site is a 0.65-acre city-owned parcel at the southeast corner of Marietta Street and Roswell Street in downtown Alpharetta. It is currently wooded with a mix of hardwood trees and dense understory vegetation. It slopes from the northwest to the southeast at a slope of approximately seven percent. The site is bordered on the east and south by three privately owned parcels zoned C2 Commercial. A planned segment of the Alpha Loop is currently in the design phase along the site's western boundary.

The City proposes developing the site into a passive park space that will require minimal maintenance requirements. It will connect directly to the future Alpha Loop trail along Roswell Street and to the prominent corner of Marietta and Roswell Streets. Given the possibility of future development on the adjacent parcels, there is a desire to create a heavy vegetated buffer along the eastern and southern edges. Funding for construction will be provided through impact fees (100% allowable use; Park/Walking Trail).

Operating Budget Impact: Maintenance costs are estimated at $3,600 annually for lawn maintenance services.

Outdoor Electrical Connections for Roswell Steet and Canton Street $50,000 (Holiday Lighting) – new to CIP ($11,400 operations/$50,000 capital)

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community
- Recreation, Parks, and Culture
- Infrastructure and Facilities Maintenance

Description: This request is for the installation of twenty-five (25) permanent outdoor electrical service connections in designated tree wells within the City's public right-of-way along Roswell Street and Canton Street. Each installation will include underground conduit, wiring, weather-resistant electrical components, and code-compliant connections designed for long-term outdoor use.

Installing permanent electrical service will:

- Improve safety by avoiding temporary wiring and surface cords.
- Enhance reliability and consistency of holiday displays.
- Support expanded seasonal programming and special events.

- Preserve streetscape aesthetics through concealed infrastructure.

The electrical service will support seasonal holiday decor, promoting community engagement and downtown vibrancy.

In conjunction with this capital request, there is an operating initiative ($11,500 annually) to expand the installation, removal, and storage of holiday lighting to the Roswell Street and Canton Street area. This will enhance the Downtown Alpharetta experience during the holiday season by implementing a cohesive, high-quality outdoor holiday lighting program along Roswell Street and Canton Street. The initiative aims to increase foot traffic, support local businesses, reinforce Alpharetta's brand as a premier destination, and create a safe, festive public area. Improved ambient lighting enhances visibility and perceived safety during evening hours. By expanding the holiday lighting to Roswell Street and Canton Street, it reinforces Alpharetta's downtown identity with a consistent, photo-worthy streetscape.

Alpha Loop Electrical Installation (new to CIP) **$25,000**

Fiscal Year 2027 Annual Action Plan:

- The Alpha Loop and Greenway
- Safe and Welcoming Community
- Recreation, Parks, and Culture

Description: This request provides funding for the permanent installation of electrical service along the Alpha Loop from Northwinds Parkway to Old Milton Parkway. The Alpha Loop is a highly visible public corridor and a key community amenity and economic development asset.

The project will include installation of underground conduit and wiring, weather-resistant electrical components, and code-compliant connections designed for long-term outdoor use. Permanent electrical service will enhance safety and support seasonal lighting and special events.

The inaugural Lights on the Loop event was held in December 2024, presented by the Alpharetta Convention & Visitors Bureau and the Alpha Loop Foundation. The event was highly successful and generated strong interest in continuing it annually. Installing permanent electrical infrastructure will support the long-term sustainability and growth of this event and similar activations along the Alpha Loop.

Operating Budget Impact: Maintenance and energy costs are estimated at a minimum of $500 annually.

Design Services (Recreation, Parks & Cultural Services) **$10,000**

Fiscal Year 2027 Annual Action Plan:

- Recreation, Parks, and Culture

Description: This funding request supports a range of studies and professional services that arise annually from initiatives driven by the Council and/or Department. These services are integral to the continuous development and improvement of our community's recreation infrastructure and programming.

The services required may include but are not limited to:

- Revisions to the Recreation Master Plans to ensure alignment with evolving community needs and industry best practices.
- Development of construction plans for new or upgraded recreation amenities, such as pavilions, gazebos, and other public spaces that enhance community engagement.

These studies and professional services play a vital role in forecasting market trends, establishing standards that inform policy decisions, and improving project timelines and functionality. By securing the necessary funding, we can maintain the high level of service our residents and customers expect, while also ensuring that our recreation facilities are sustainable, accessible, and effective in meeting future demands.

Operating Budget Impact: N/A.

Detail (Unfunded Capital Initiatives)

Human Resources

HR Office Improvements **$70,000**

Fiscal Year 2027 Annual Action Plan:

- People Focused Workforce

Description: The new HR Specialist position funded in FY 2023 is responsible for recruitment and the administration of our human resources information systems (HRIS) current modules (applicant tracking system, onboarding, eForms, personnel records management system), and any future additions (i.e., performance evaluation).

The current configuration of the HR office presents challenges to fostering a cohesive departmental culture and collaboration. The HR Specialist is physically located in another department, creating a disconnect that affects the sense of belonging and teamwork.

The capital improvements requested herein are for the reorganization of the Human Resources office to better utilize current space for efficient workflow and to allow accommodation for future personnel growth. The objective is to have three offices (two currently) with doors to deal with confidential matters, one reception desk, one workspace (copy and other office machines) and space for an applicant computer kiosk.

Operating Budget Impact: Additional facility maintenance funding including janitorial costs will be incurred.

Police

911- 24 Hour Console Chair Replacement **$32,000 (911 Fund)**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community

Description: The Alpharetta Emergency Communications Center (AECC) requests funding to replace the operational chairs used at all 911 consoles. The current chairs are nearing the end of their functional life cycle, have experienced significant wear, and no longer provide the ergonomic support required for 24/7/365 emergency communications operations. As a result, staff are experiencing increased discomfort, reduced posture support, and a higher frequency of minor equipment repairs, all of which negatively impact both employee wellness and operational readiness.

911 communications chairs are specialized, heavy-duty, ergonomically engineered equipment specifically designed for continuous multi-shift use. Unlike conventional office chairs, public safety console seating must meet durability standards for prolonged usage, adjustable multi-user configurations, and compliance with occupational health and safety requirements for critical-task environments.

Quotes received to date range from $30,000 to $32,000 for a full replacement set. As this request is intended for FY 2027, cost projections must include expected inflation, supply chain variability, and vendor price adjustments typical for specialized public safety

equipment. Accordingly, the estimated project cost has been adjusted upward to ensure adequate funding.

Failure to replace these chairs will result in continued equipment degradation, increased maintenance costs, elevated staff discomfort and fatigue, and potential injury claims that could exceed the cost of proactive replacement. Reliable, supportive seating is foundational to sustained dispatcher performance and the delivery of high-quality emergency communications services to the public.

This project ensures AECC remains aligned with industry standards for ergonomics, employee safety, and operational efficiency.

This project includes the replacement of nine (9) 24/7-rated public safety dispatch chairs. Of these, six (6) chairs will be standard-duty ergonomic dispatch models, and three (3) chairs will be upgraded, heavy-duty "extended-size" models designed to safely and comfortably accommodate larger body types. All chairs selected will be rated for continuous 24/7/365 multi-operator use, meet occupational ergonomics requirements, and include full adjustability for a wide range of dispatcher body sizes and postures.

Funding would be provided through the 911 Fund but, due to the current subsidy requirement, the source of funding would be from the municipalities served (e.g. City of Alpharetta).

Operating Budget Impact: There are no ongoing operational costs anticipated beyond routine cleaning and normal warranty-covered maintenance.

Fire

Fire Station Renovations/Improvements **$3,500,000**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- People Focused Workforce

Description: This request is for full design, construction, and project management funding for Fire Station 83 and delivers on a portion of the Fire Station facility assessment/conceptual design work approved by the City Council in 2023.

- **Background (Fire Station Assessment/Design)**

  In January 2023, at the City Council retreat, directions were provided to conduct a facilities assessment of the city's fire stations.

  In April 2023, a complete list of requirements was created in preparation for an RFP process in May and June 2023. The expectation was to have the consultant identify improvement potential to update and modernize our fire stations within the current footprint, where possible, for each fire station, to comply with the Clean Station Concept. Facility expansion may be a consideration where cost and lot space allow. Assessments and recommendations may include architectural and engineering design services to improve the living and working environments; workflow and open floorplan; and building features, including public spaces, officer

/ non-officer areas, storage and maintenance areas, exterior improvements, etc. The RFP was awarded to Jericho Design Ground in August 2023.

Staff have worked with the Jericho design team to identify improvements to our fire stations that meet the intent of the assessment process and our strategic goals as identified above. The revised capital budget for FS 81 totals $3.4 million (design, construction, furniture/fixtures/equipment, project management services). This project is anticipated to begin construction during FY 2026.

- **Current Status**
  The request for FY 2027 includes funding for Fire Station 83 improvements totaling $3.5 million for design, construction, furniture/fixtures/equipment, and project management services.

Funding options include general capital appropriations and impact fee funds (100% of expansion cost is impact fee eligible – limiting factor is available public safety impact fees which, as of Spring 2026, were fully allocated to FS 81 improvements).

Operating Budget Impact: Facility maintenance costs are anticipated to be substantially similar to current operations or decline due to the renovations (e.g. energy efficiency improvements).

Public Works

Stormwater **$1,500,000 (unfunded)**

Fiscal Year 2027 Annual Action Plan:

- Infrastructure and Facilities Maintenance
- Transportation and Traffic

Description: This request is for stormwater design/studies, inspection, drainage maintenance, and pipe/structure repair and maintenance. Left unchecked, stormwater can contribute to costly flooding, erosion, and pollution issues that wreak havoc on our community.

Included in this request are various drainage, flood, and watershed studies that are required by state and federal regulations. Watershed studies identify capital projects to improve water quality in impaired streams. Additional studies include dam breach analysis, bacterial source testing, emergency planning and estimating damage, GIS maintenance, inventory updates, stream delisting, etc. These studies also identify future capital improvement projects or provide specific information that can be used by the city to meet regulatory compliance or further our service to our citizenry. This funding will also be utilized for the design of smaller drainage repairs, such as Harris Road drainage improvements, Haynes Bridge Road at Morrison Parkway drainage improvements, Pond retrofitting and dredging/permitting, etc.

The National Pollutant Discharge Elimination System (NPDES) Stormwater Permit requires Alpharetta to complete several inspections to protect our stormwater system. These inspections include site visits to private industrial facilities, private carwash and auto body repair shops, city ponds and stormwater management facilities, private ponds

and stormwater management facilities, and city-maintained storm structures and pipes. These inspections help us identify maintenance repair work, help us prioritize our crews and CIP lists, and help us recognize private violations of the stormwater ordinance. This project includes hiring a private consultant to complete the inspections so that city staff can focus their efforts on planning, maintenance, and enforcement activities. Additionally, this request is for continual maintenance and small drainage maintenance work within the City.

One section of the work is pond and best management practices (BMP) maintenance, testing, sampling, work crew materials, education materials, and tree impediment maintenance. Pond and BMP maintenance in required by the Georgia Environmental Protection Division MS4 permit and includes ponds, bioretention, green infrastructure, pervious pavers, etc. Water quality education, education materials, and testing on streams and runoff is also required by the Georgia Environmental Protection Division. Sampling and testing include laboratory and field materials, testing, analysis, etc. Funding is included herein for Retention Pond Maintenance and improvements for Webb Bridge Park and North Park.

Another section includes small drainage repair and maintenance designs, crew materials such as rip rap, pine straw, grout, sod, etc., street sweeping, and removal of trees and shrubs blocking storm flow from or to pipes and structures or otherwise impeding water flow.

The final component of this request is for stormwater pipe and structure maintenance, repair, and replacement. This category includes unclogging pipes and structures filled with sediment and debris, repairing pipes by relining, contractual repairs to stormwater structures, and pipe replacement projects citywide in addition to targeted projects such as Alpha Loop offline detention, Wills Park stream restoration, Northwinds Culvert Design/Construction, multiple on- call stormwater improvement task orders, and drainage Improvements in Clairmonte subdivision. The contractual pipe un-clogging and structure repair will be throughout the city based on inspection results.

Annual funding requests are approximately $3-4 million based on forecasted needs over a 10+ year project horizon. That said, current funding levels within the Stormwater account total more than $3.2 million (as of January 2026) and the FY 2027 funding allocation was adjusted to $1.5 million. This is the companion unfunded request for the remaining $1.5 million needed to augment the annual stormwater funding.

Operating Budget Impact: This program decreases maintenance costs as flooding and erosion will be reduced.

Tandem Dump Truck; Qty: 1 (Fleet Replacement) $200,000

Fiscal Year 2027 Annual Action Plan:

- N/A – General Capital Maintenance/Investment

Description: This request is for the replacement of Public Works Department vehicles in accordance with the City's Fleet Maintenance and Replacement Policy ("Policy"). Vehicle replacement requests for the upcoming budget year meet the established criteria within the Vehicle Replacement Framework section of the Policy while all other years are based on a forecast of vehicles meeting the established criteria (e.g. based on forecasted utilization rates, etc.).

The vehicle identified below will be recommended for replacement based on the Vehicle Replacement Framework within the Policy which includes multiple criteria such as age/mileage (minimum of 15 years and/or 150,000 miles for this vehicle category), idle time/engine hours, maintenance cost analysis, reliability and downtime, safety issues, obsolescence, and mission suitability.

The tentative request for FY 2027 includes the replacement of the following:

- Unit 70 = 1995 Ford LT9000 Dump (age = 21 years) with 43,670 miles as of February 2026. Engine hours are not readily accessible from this vehicle year/make/model. The replacement criteria are age, reliability, and difficulty in obtaining parts for necessary maintenance and repairs. This unit was purchased for $43,081. In FYs 2025-2026, the department has spent $9,233 on maintenance and repairs.

The above is subject to change based on prioritization of need pursuant to the Policy (e.g. in the case of an alternate vehicle taking priority in the replacement framework due to mechanical failure, downtime, etc.).

Operating Budget Impact: This program reduces fleet maintenance costs and increases utilization rates as the equipment is less susceptible to breaking down and/or requiring service. Operational costs consist of maintenance, fuel, insurance, etc. and are currently budgeted.

City Hall Generator and Enclosure $1,300,000

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community

Description: This request is for the purchase and installation of a generator for City Hall to ensure continued operations to citizens and stakeholders during times of power outages including natural disasters. Specifically, this cost estimate is for a natural gas generator sufficiently sized to allow for continued operations of City Hall (roughly 55,000 sq. ft.) as well as construction of an enclosure to house the generator that matches the aesthetics of City Hall. The generator is estimated at $850,000 and the enclosure is estimated at $400,000. Design and permitting is estimated at $50,000.

Operating Budget Impact: Operational costs would be minimal. Gas usage would be based solely on when the generator is operating, and inspection/maintenance cost would be approximately $3,000 a year.

Alpharetta Community Center Generator **$375,000**

Fiscal Year 2027 Annual Action Plan:

- Safe and Welcoming Community

Description: This request is for the purchase and installation of a generator for the Alpharetta Community Center. The budget requested would be for a 400 kw Blue Star generator. A 400 kw was priced due to the unit being capable of powering the entire building in the event of a power outage. A smaller generator could be installed at a lower cost if it's determined there is no need to power the entire building during times of power outages. Beyond the cost of the generator, other costs include gas meter upgrades, gas line upgrade and installation of a regulator. The total requested amount is $375,000.

Operating Budget Impact: Operational costs would be minimal. Gas usage would be based solely on when the generator is operating, and inspection/maintenance cost would be approximately $3,000 a year.

Construction Manager - Infrastructure (new position; +1 FTE) ($141,400 operations/$55,000 capital) **$55,000**

2027 City Council Priorities and Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: Public Works is requesting the addition of a Construction Manager position (pay grade 309; assumed 5% above pay grade minimum).

The City allocated over $4 million last year and is planning to do such over the next 10 years towards stormwater work throughout the City. Much of the construction work is contracted out to contractors to resolve various stormwater issues. Work varies from replacing a structure, lining, or replacing a pipe, or a large-scale construction project.

Due to the number of incoming projects and programmed projects, the Department is unable to adequately oversee construction oversight of the contractors in the field for the installation of City maintained infrastructure. Public Works is requesting an Infrastructure Construction Manager Position to oversee various field operations regarding stormwater improvements. The position not only requires knowledge of reading construction plans, communication skills with the public and contractors, as well as problem-solving skills when unknown issues arise in the field.

Public Works currently has seven stormwater projects in design or construction soon to be procured, over 1 million dollars a year in pipe lining, and numerous stormwater repairs (catch basin tops, grouting of manholes/pipes, and pipe replacements) throughout the City. Public Works staff is already committed to overseeing construction management of the Park's Bond Projects, TSPLSOT I/II projects, as well as capital projects.

Capital costs are estimated at $55,000 and include funding for a vehicle purchase (and upfitting). There is a companion operating initiative request to fund the personnel/operational costs. Personnel costs are estimated at $133,900 annually and reflect salary and benefit costs only. Operational costs in year one includes technology

equipment (computer, phone, iPad, etc.), professional development, uniforms, general supplies, and fuel costs totaling $7,500.

Facility Operations Manager (new position; +1 FTE) $71,500
($141,400 operations/$71,500 capital)

2027 City Council Priorities and Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: Public Works is requesting the addition of a Facility Operations Manager position (pay grade 309; assumed 5% above pay grade minimum).

The City embarked on an energy audit as well as a facility assessment over the last year. The report outlines various capital initiatives and improvements to all the City's facilities. Currently, there is one individual overseeing the crews accomplishing work orders and overseeing vendors accomplishing various tasks in the facilities (electrical, mechanical, structural, painting, etc.). This position will be responsible for overseeing execution of the program, procuring vendors to implement various improvements, maintaining the software system associated with the facility assessment, and overseeing the Engineering Technician(s) working in the Facility Group. Separating the responsibilities within the Facilities Group will enable supervisors to spend more time ensuring work is accomplished meeting the expectations of the City and enable individuals to become proactive instead of reactive when it comes to implementing improvements.

Capital costs are estimated at $71,500 and include funding for a vehicle purchase (and unfitting). There is a companion operating initiative request to fund the personnel/operational costs. Personnel costs are estimated at $133,900 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer, phone, iPad, etc.), professional development, uniforms, general supplies, and fuel costs totaling $7,500.

Infrastructure Crew (new positions; +4 FTE) $88,000
($363,700 operations/$88,000 capital)

2027 City Council Priorities and Annual Action Plan:

- Infrastructure and Facilities Maintenance

Description: Public Works is requesting the addition of the following new positions:

- +1 FTE - Public Works Crew Leader position (pay grade 305; assumed 5% above paygrade minimum).
- +2 FTEs - Public Works Technician II position (pay grade 303; assumed 5% above paygrade minimum).
- +1 FTE - Public Works Technician I position (pay grade 302; assumed 5% above paygrade minimum).

Currently the Public Works Department has 2 crews of 4 individuals that handle repairs to stormwater infrastructure, curb and gutter, sidewalks (concrete and brick paver), and City roads. One of the biggest challenges the department faces these days is making timely repairs to sidewalks. The Department maintains over 235 miles of sidewalk in the City, majority of the sidewalk is concrete. Over time, sidewalks have settled, cracked, and/or tree roots have uplifted the sidewalk causing trip hazards. Crews can accomplish repairs primarily in subdivisions. This crew will be able to handle concrete and brick paver sidewalk repair, curb and gutter repair, and other concrete work within the City's right of way. Work along busier streets throughout the City require significant traffic control measures and the crews are not equipped size wise to handle work of this nature. A crew of four individuals will consist of a Crew Leader, (2) Tech II's and (1) Tech I.

Capital costs are estimated at $88,000 and include funding for a vehicle purchase (and unfitting). There is a companion operating initiative request to fund the personnel/operational costs. Personnel costs for the four new positions are estimated at $353,700 annually and reflect salary and benefit costs only. Operational costs in year one includes technology equipment (computer, phone, iPad, etc.), professional development, uniforms, general supplies, and fuel costs totaling $10,000.

Summary 5-Year CIP

A summary version of the city's five-year capital improvement plan ("CIP") is included below. The CIP forecasts the city's available funding for capital investment over a five-year period and provides a preliminary project prioritization (subject to adjustment in future years). These figures do not include the city's existing capital initiatives (i.e., initiatives funded prior to FY 2026) and do not represent full funding of departmental capital project requests. Please refer to Appendix A for the detailed 5-Year CIP.

FY 2027-2031 Capital Improvement Plan

April 28, 2026

	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total
Sources						
General Fund (Annual Appropriation)	$ 475,000	$ 484,500	$ 494,190	$ 504,074	$ 514,155	$ 2,471,919
General Fund (Fund Balance)	5,661,572	9,369,363	7,450,310	7,643,538	8,205,549	38,330,332
General Fund (Tree Bank)	-	150,000	75,000	75,000	75,000	375,000
	$ 6,136,572	$ 10,003,863	$ 8,019,500	$ 8,222,612	$ 8,794,704	$ 41,177,251
Other Funds (Investment Earnings) - not incl. TSPLOST	$ 500,000	$ 480,000	$ 480,000	$ 480,000	$ 480,000	$ 2,420,000
Other Funds (Fund Balance) - not incl. TSPLOST	3,950,000	-	-	-	-	3,950,000
Impact Fees	2,500,000	-	-	-	-	2,500,000
Hotel Fund (TPD; Wayfinding Monuments)	-	125,000	600,000	-	-	725,000
TSPLOST 1 and 2 (TSPLOST, Investment Earnings)	19,589,099	-	-	-	-	19,589,099
TSPLOST 3 (forecast)	-	60,888,767	-	10,745,076	-	71,633,843
	$ 26,539,099	$ 61,493,767	$ 1,080,000	$ 11,225,076	$ 480,000	$ 100,817,942
Capital Lease						
Capital Lease (ESPC): City Facility Preventative Maintenance Assessment and Implementation	$ 2,275,000	$ -	$ -	$ -	$ -	$ 2,275,000
Fire Extrication Equipment Replacements	-	179,000	-	-	-	179,000
Portable (Handheld) Radios Replacement	-	-	1,766,000	-	-	1,766,000
Mobile (Vehicle) Radio Replacements	-	-	600,000	-	-	600,000
Fleet Replacement: Fire Apparatus Replacements	-	-	-	800,000	-	800,000
Heart Monitor & AEDs Replacements	-	-	-	-	700,000	700,000
Grant/Contribution						
LMIG (Milling and Resurfacing)	731,300	753,200	775,800	799,100	823,100	3,882,500
LRA (Milling and Resurfacing)	838,403	-	-	-	-	838,403
	$ 3,844,703	$ 932,200	$ 3,141,800	$ 1,599,100	$ 1,523,100	$ 11,040,903
Total Sources	**$ 36,520,374**	**$ 72,429,830**	**$ 12,241,300**	**$ 21,046,788**	**$ 10,797,804**	**$ 153,036,096**

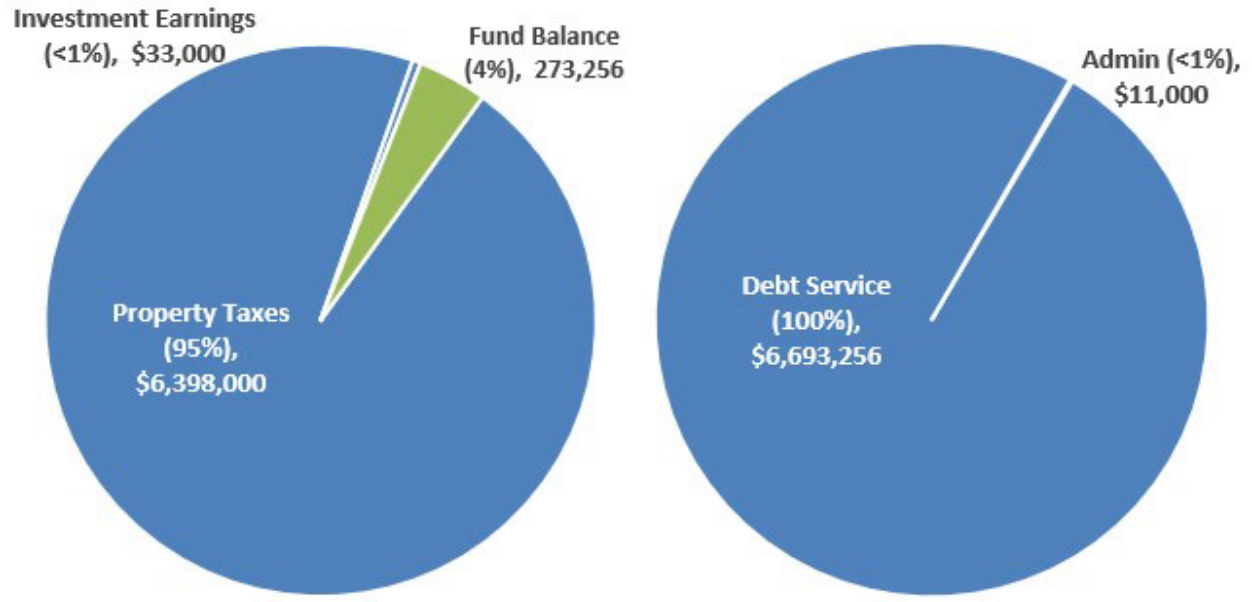
	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total
Uses (by Department)						
Economic Development	$ 100,000	$ 100,000	$ 200,000	$ 100,000	$ 100,000	$ 600,000
Information Technology	567,800	955,800	614,000	422,300	1,270,800	3,830,700
Police	1,556,249	2,185,000	4,636,000	2,355,000	2,446,000	13,178,249
Fire	-	600,750	441,838	1,262,804	1,107,195	3,412,587
Public Works	13,226,300	66,486,467	3,797,300	14,971,776	3,236,900	101,718,743
Recreation, Parks & Cultural Services	2,862,500	1,738,000	1,757,000	1,718,000	1,945,000	10,020,500
Community Development	-	361,200	752,500	154,900	458,800	1,727,400
Total Uses	**$ 18,312,849**	**$ 72,427,217**	**$ 12,198,638**	**$ 20,984,780**	**$ 10,564,695**	**$ 134,488,179**
Non-Allocated (Sources-Uses)	**$ 18,207,525**	**$ 2,613**	**$ 42,662**	**$ 62,008**	**$ 233,109**	**$ 18,547,917**
Total Uses + Non-Allocated	**$ 36,520,374**	**$ 72,429,830**	**$ 12,241,300**	**$ 21,046,788**	**$ 10,797,804**	**$ 153,036,096**

Debt Service Fund Summary

Overview

Pursuant to the Governmental Accounting Standards Board's Codification, Section 1300.107, debt service funds are used to account for the accumulation of resources for the payment of principal and interest on general long-term debt (not including capital leases).

FY 2027 Budget: $6,704,256



Revenues by Source | **Expenditures by Use**

The city has one debt service fund that accounts for debt service on the following obligations (except where noted) along with the principal amounts outstanding as of the start of FY 2027.

GENERAL OBLIGATION (GO) BONDS	$
GO Bonds, Series 2016	$ 46,190,000
GO Refunding Bonds, Series 2020	16,165,000
GO Bonds, Series 2022	24,500,000
Total GO Debt	$ 86,855,000

DEVELOPMENT AUTHORITY	$
Revenue Bonds, Series 2013[14]	$ 1,770,000
Revenue Bonds, Series 2016[13]	20,215,000
Total Development Authority Debt	$ 21,985,000

[14] This obligation is funded out of the General Fund (Series 2013) and Hotel/Motel Fund (Series 2016) and shown herein for the purposes of providing a comprehensive overview of all bond debt obligations.

DEBT SERVICE FUND SUMMARY

Debt Issuance Methodology

The city's preferred method for funding the acquisition and construction of major items, such as buildings, infrastructure, parks, streets, and other major capital facilities shall be through current revenue when available (i.e., pay-as-you-go) or from outside funding sources such as grant funding and related aid.

General obligation bonds have been issued to fund numerous large-scale projects including public safety facilities, parks and recreation facilities, and transportation improvements that continue to define Alpharetta as a desirable community to work and live in. The city issues general obligation bonds to provide capital improvement funding when the project(s) are of sufficiently large scale, and it is appropriate to achieve a fair allocation of costs between current and future beneficiaries.

Debt Issuance Activity

GO Bonds, Series 2022: In November 2021, the voters of the City of Alpharetta approved the issuance of General Obligation Bonds (the "2022 Alpharetta Parks Bonds") to fund $29.5 million in improvements aimed at constructing a variety of park enhancements and projects including:

- Wills Park Equestrian renovation build out (50% match with the Equestrian Foundation).
- Turf for Webb Bridge Park large soccer field.
- Wills Park Master Plan projects.
- Union Hill Park redevelopment/trailhead.
- Mid Broadwell Park build out.
- Old Rucker Park design and build out.
- Farmhouse Park design and build out.
- Waters Road Park design & build out.
- Alpha Loop.

The 2022 Alpharetta Parks Bonds were issued in February 2022 in a par amount of $27 million (not including a $2.5 million premium which assisted in funding the $29.5 million in project improvements) with a 25-year term and a true-interest cost of 2.38%.

GO Refunding Bonds, Series 2020: In April 2020, the city issued $18 million (par) of City of Alpharetta General Obligation Bonds Refunding Bonds, Series 2020, for refunding of the outstanding Series 2012 General Obligation Bonds (saving over $300,000 annually).

The Series 2012 General Obligation Bonds funded the redevelopment of 22-acres in the heart of Downtown Alpharetta (the "City Center" project) to include a vibrant environment of parks and civic spaces that serve as a gathering place for citizens and attract business and investment to this important area of our community.

The Public portion of City Center includes a new Fulton County Library (funded separately through Fulton County); 5-acre Public Park; Town Square; new Alpharetta City Hall; and 450+/- space Public Parking Garage. These components create a place and an atmosphere where people naturally want to be.

While there, many also patronize the unique shops and restaurants that call Downtown Alpharetta home.

The environment created through these civic elements attracted private investment that drove the second phase of the development (mixed-use residential, retail, and office).



City Center

GO Bonds, Series 2016: In May 2016, the voters of the City of Alpharetta approved the issuance of General Obligation Bonds (the "2016 Alpharetta Parks and Transportation Bonds") to fund $52 million in improvements aimed at alleviating traffic congestion, expanding sidewalk connectivity, improving park amenities, extending the Big Creek Greenway north to connect with Forsyth County's Greenway, and securing parkland for future passive and active park systems.

The 2016 Alpharetta Parks and Transportation Bonds were issued in July 2016 in a par amount of $52 million (including premium) with a 25-year term and a true-interest cost of 2.83%.



Bond Ratings

The city's AAA bond rating was reaffirmed by Moody's and Standard & Poor's ("S&P") during January 2022 in conjunction with the sale of $27 million (par) of Series 2022 General Obligation Bonds to fund a variety of park enhancements and projects.

The AAA rating represents the highest rating available to municipalities and translates to significant savings to our citizens and stakeholders through reduced borrowing costs. This rating demonstrates the strongest creditworthiness relative to other US municipal or tax-exempt issuers and reflects the city's current sound financial position as well as strong financial management practices guiding our ongoing decision making.

These practices are supported by formal policies to guide budget and procurement practices, capital investment, and debt management. Other positive factors include a relatively strong economic base and manageable debt/pension burdens. The FY 2027 Budget is mindful of these factors and the importance of maintaining the highest rating, not only for our citizens but also our bondholders.

Bond Smoothing

The city's primary method of funding large-scale capital projects is through the issuance of bonds (e.g., general obligation bonds, Development Authority bonds, etc.). General obligation bonds have been issued to fund numerous large-scale projects including public safety facilities, parks and recreation facilities, and transportation improvements that continue to define Alpharetta as a desirable community to work and live in. General obligation bonds are funded through a separate millage levy (discussed below).

The Alpharetta Development Authority, a component unit of the city that is focused on economic development within our borders, issued bonds in 2016 to fund construction of our state-of-the-art Conference Center. These bonds are funded by a portion of the Hotel/Motel Tax.

Principal and interest payments for fiscal year 2027 are budgeted at $8.5 million with the following forecast: 2028 - 2041[15]: $8.8 million (annual average); 2042-2046[16] totaling $1.6 million (annual average). These figures include City and Development Authority obligations and span multiple Funds.

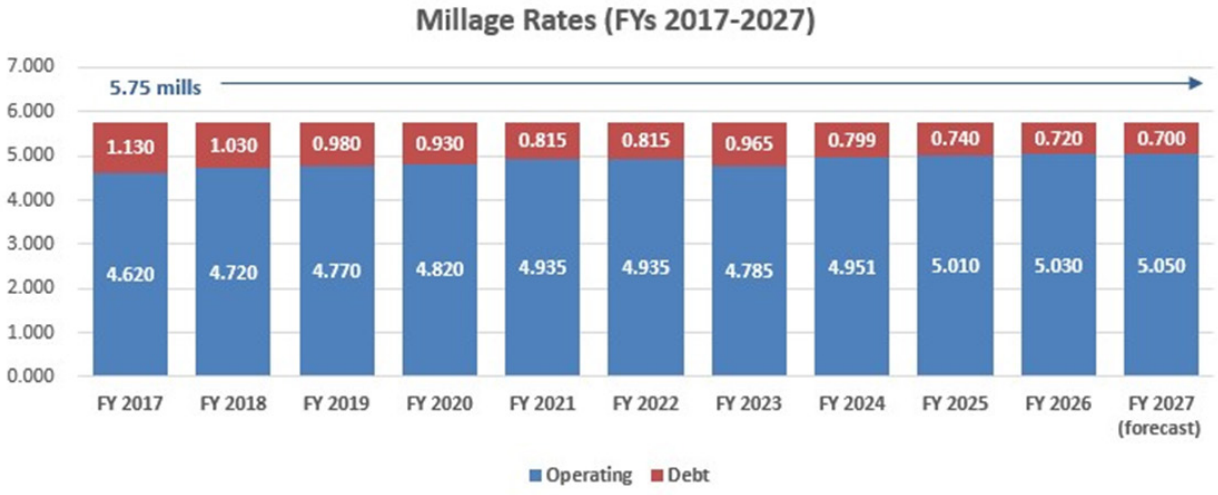
[15] Represents the final maturity of the Series 2016 Alpharetta Parks and Transportation Bonds and the Series 2016 Development Authority Revenue Bonds.

[16] Represents the final maturity of the Series 2022 General Obligation Bonds.

DEBT SERVICE FUND SUMMARY

Millage Rates

The city has historically acknowledged the need to provide a taxation rate commensurate with the government's level of service. The chart below illustrates the annual millage rates levied by the city for the last 10 years including the request for FY 2027.



The FY 2027 Budget is based on maintenance of the city's millage rate at 5.750 mills.

- The portion of the millage rate funding debt service (Debt Service Fund) is estimated to decrease 0.020mills compared to FY 2026 to a total of 0.700 mills. As our annual debt service obligations are relatively flat, growth in the tax digest allows for a reduction in the debt service millage rate. The decrease in tax revenue associated with the debt service millage shift is estimated at -$180,000.
- The portion of the millage rate funding operations and capital investment (General Fund) is estimated to increase 0.020 mills compared to FY 2026 to a total of 5.050 mills. The increase in tax revenue associated with the operations millage shift is estimated at +$145,000 and has been allocated towards operating initiatives and capital funding. The shift from debt service millage to operations millage results in additional tax savings for our homeowners as the operations millage rate is subject to homestead exemptions.

General Obligation Bond Debt

General Obligation ("GO") bonds are direct obligations and pledge the full faith and credit of the city. Original issue GO bonds are generally issued as 20/25-year serial bonds. Refunding GO bonds are issued in a maturity not exceeding the maturity of the refunded bonds. The following schedule provides a detailed listing of total debt service requirements of the city's GO bonds through maturity.

General Obligation Bonds (All Series)

	Principal	Interest	Total Debt Service
FY 2027	3,745,000.00	2,948,255.00	$ 6,693,255.00
FY 2028	3,940,000.00	2,778,105.00	$ 6,718,105.00
FY 2029	4,170,000.00	2,598,655.00	$ 6,768,655.00
FY 2030	4,400,000.00	2,408,755.00	$ 6,808,755.00
FY 2031	4,615,000.00	2,207,442.50	$ 6,822,442.50
FY 2032	4,850,000.00	1,995,117.50	$ 6,845,117.50
FY 2033	5,465,000.00	1,782,667.50	$ 7,247,667.50
FY 2034	5,625,000.00	1,618,717.50	$ 7,243,717.50
FY 2035	5,790,000.00	1,449,967.50	$ 7,239,967.50
FY 2036	5,960,000.00	1,286,382.50	$ 7,246,382.50
FY 2037	6,115,000.00	1,117,342.50	$ 7,232,342.50
FY 2038	6,295,000.00	942,607.50	$ 7,237,607.50
FY 2039	5,985,000.00	753,757.50	$ 6,738,757.50
FY 2040	6,120,000.00	574,207.50	$ 6,694,207.50
FY 2041	6,295,000.00	398,707.50	$ 6,693,707.50
FY 2042	1,415,000.00	217,475.00	$ 1,632,475.00
FY 2043	1,450,000.00	182,100.00	$ 1,632,100.00
FY 2044	1,495,000.00	138,600.00	$ 1,633,600.00
FY 2045	1,540,000.00	93,750.00	$ 1,633,750.00
FY 2046	1,585,000.00	47,550.00	$ 1,632,550.00
FY 2047	-	-	$ -
	$ 86,855,000.00	**$ 25,540,162.50**	**$ 112,395,162.50**

Development Authority Revenue Bond Debt

Development Authority Revenue Bonds, Series 2013: The purpose of this bond issue was to fund a portion of the development, equipping, and construction of Gwinnett Technical College's Alpharetta campus. The Series 2013 Development Authority Revenue Bonds were issued in June 2013 in a par amount of $4.1 million with a 20-year term and a true-interest cost of 3.13%. The City is obligated to pay 100% of the total principal and interest payments on the bonds. This obligation is funded from the General Fund through non-advalorem revenue.



Development Authority Revenue Bonds, Series 2016: The purpose of this bond issue was to fund the new state-of-the-art 44,000 square foot Conference Center through a public-private partnership with North American Properties (developer of Avalon). Along with the Conference Center, North American Properties constructed a 330-room Marriott Autograph hotel abutting the Center. North American Properties is operating the Conference Center that includes the largest meeting room in the north Fulton market. Economic impact studies have indicated that a conference center could bring in almost $23.5 million in visitor spending, generating 545 jobs with more than $15.7 million in earnings and over $51.3 million in total economic output annually.



The FY 2027 budget includes funding within the Hotel/Motel Fund to cover debt service associated with bonds issued to fund construction of the Center. The debt service is fully funded through the hotel/motel tax.

Development Authority Revenue Bonds (City Portion)

	Principal	Interest	Total Debt Service
FY 2027	1,140,000.00	626,027.50	$ 1,766,027.50
FY 2028	1,195,000.00	600,640.00	$ 1,795,640.00
FY 2029	1,255,000.00	573,802.50	$ 1,828,802.50
FY 2030	1,310,000.00	544,377.50	$ 1,854,377.50
FY 2031	1,375,000.00	510,765.00	$ 1,885,765.00
FY 2032	1,445,000.00	474,050.00	$ 1,919,050.00
FY 2033	1,525,000.00	429,350.00	$ 1,954,350.00
FY 2034	1,315,000.00	382,200.00	$ 1,697,200.00
FY 2035	1,390,000.00	342,750.00	$ 1,732,750.00
FY 2036	1,465,000.00	301,050.00	$ 1,766,050.00
FY 2037	1,545,000.00	257,100.00	$ 1,802,100.00
FY 2038	1,625,000.00	210,750.00	$ 1,835,750.00
FY 2039	1,710,000.00	162,000.00	$ 1,872,000.00
FY 2040	1,800,000.00	110,700.00	$ 1,910,700.00
FY 2041	1,890,000.00	56,700.00	$ 1,946,700.00
FY 2042	-	-	$ -
	$ 21,985,000.00	**$ 5,582,262.50**	**$ 27,567,262.50**

Legal Debt Margin

The legal debt limit for the City is equal to 10% of the assessed value of the tax digest. For fiscal year 2026, the debt margin is estimated at $852 million with currently outstanding general obligation debt representing 10% of capacity.

City Of Alpharetta
Legal Debt Margin (last five fiscal years)

	2026*	2025	2024	2023	2022
Debt limit	$ 941,929,521	$ 890,756,854	$ 852,897,473	$ 747,366,776	$ 683,511,318
Total net debt applicable to limit	89,538,991	94,483,873	98,569,941	102,601,142	106,876,818
Legal Debt Margin	**$ 852,390,530**	**$ 796,272,981**	**$ 754,327,532**	**$ 644,765,634**	**$ 576,634,500**
Total net debt applicable to the limit as a percentage of debt limit	10%	11%	12%	14%	16%

Legal Debt Margin Calculation for Fiscal Year 2026

Taxable Assessed Value	$ 9,235,882,700
Add back: Exemptions	183,412,509
Total assessed value	*9,419,295,209*
Debt limit (10% of total assessed value)	$ 941,929,521
Debt applicable to limit:	
General obligation bonds	90,395,000
Less: Amount set aside for repayment of general obligation debt	(856,009)
Total net debt applicable to limit	*$ 89,538,991*
Legal Debt Margin	**$ 852,390,530**

Source: City of Alpharetta Finance Department

** FY 2026 data represents estimates.*

DEBT SERVICE FUND SUMMARY

Statement of Budgetary Comparisons

Debt Service Fund
Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Property Taxes					
Current Year	$ 6,778,913	$ 6,247,147	$ 6,174,534	$ 6,150,000	$ 6,370,000
Delinquent	114,423	69,520	79,819	17,000	20,000
Penalties/Interest	10,842	13,062	19,972	3,000	3,000
Motor Vehicle	12,664	9,635	21,370	6,000	5,000
Investment Earnings	114,853	158,317	152,438	50,546	33,000
Other					
Fund Balance	-	-	-	1,286,906	273,256
TOTAL	**$ 7,031,694**	**$ 6,497,681**	**$ 6,448,133**	**$ 7,513,452**	**$ 6,704,256**
EXPENDITURES					
Maintenance & Operations:					
Professional Services	$ 7,700	$ 15,525	$ 5,175	$ 11,000	$ 11,000
subtotal	*$ 7,700*	*$ 15,525*	*$ 5,175*	*$ 11,000*	*$ 11,000*
Debt Service					
General Obligation Bonds					
Series 2014 (refunding)	$ 1,913,129	$ 1,907,296	$ 1,895,644	$ 1,893,290	$ -
Series 2016	1,925,188	1,925,588	1,925,188	1,923,988	1,921,988
Series 2020 (refunding)	1,116,750	1,129,250	1,150,500	1,160,000	3,138,250
Series 2022	1,635,390	1,633,268	1,636,768	1,633,268	1,633,018
subtotal	*$ 6,590,457*	*$ 6,595,401*	*$ 6,608,099*	*$ 6,610,546*	*$ 6,693,256*
Non-Allocated					
Reserve	$ -	$ -	$ -	$ 891,906	$ -
subtotal	*$ -*	*$ -*	*$ -*	*$ 891,906*	*$ -*
TOTAL	**$ 6,598,157**	**$ 6,610,926**	**$ 6,613,274**	**$ 7,513,452**	**$ 6,704,256**

DEBT SERVICE FUND SUMMARY

Statement of Revenues, Expenditures, and changes in Fund Balance

Debt Service Fund
Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$ 1,095,855	$ 1,529,393	$ 1,416,149	$ 1,251,009	$ 856,009
REVENUES BY CATEGORY					
Property Taxes (incl. Motor Vehicles)	$ 6,916,841	$ 6,339,364	$ 6,295,696	$ 6,176,000	$ 6,398,000
Investment Earnings	114,853	158,317	152,438	50,546	33,000
Other	-	-	-	-	-
TOTAL	**$ 7,031,694**	**$ 6,497,681**	**$ 6,448,133**	**$ 6,226,546**	**$ 6,431,000**
EXPENDITURES BY FUNCTION					
Professional Services	$ 7,700	$ 15,525	$ 5,175	$ 11,000	$ 11,000
Debt Service/Refunding	6,590,457	6,595,401	6,608,099	6,610,546	6,693,256
TOTAL	**$ 6,598,157**	**$ 6,610,926**	**$ 6,613,274**	**$ 6,621,546**	**$ 6,704,256**
ACFR Rounding Adjustments	$ -	$ 1	$ 1	$ -	$ -
Ending Fund Balance: (1)	$ 1,529,393	$ 1,416,149	$ 1,251,009	$ 856,009	$ 582,753
Changes in Fund Balance (actual/est.)	$ 433,538	$ (113,244)	$ (165,140)	$ (395,000)	$ (273,256)

Notes:
(1) Fund Balance is utilized to offset debt service requirements.

Enterprise Fund Summary

Overview

The *Enterprise Fund Summary* section is intended to provide readers with an overall understanding of the fiscal year 2027 budget for the city's Solid Waste Fund.

Enterprise Funds are used to account for business-type activities whose operations are primarily funded by customer fees. The enterprise fund utilizes the accrual basis of budgeting and accounting.

The following schedules are set forth by Fund and provide readers with revenue and expenditure summaries/narratives from several different perspectives including:

- **Fund Summary**

  This section provides a brief description of the Fund.

- **Statement of Budgetary Comparisons**

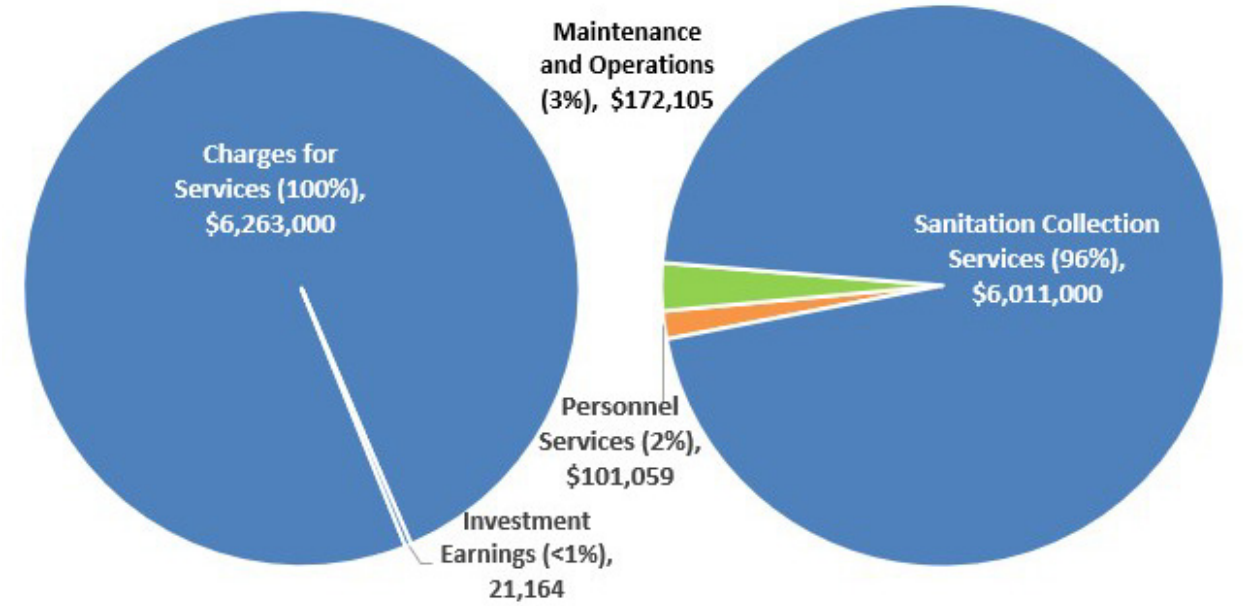
  This statement provides a detailed comparison of revenues and expenditures across multiple fiscal years. Revenues are presented by source and expenditures are presented by use.

- **Statement of Revenues, Expenditures, and changes in Fund Balances**

  This statement provides a historical comparison of revenues and expenditures for fiscal years 2023-2027. Also included are changes in fund balance. The financial forecast utilizes revenue collection patterns (historical and current patterns as adjusted for seasonal fluctuations), expenditure trends and mandates, etc.

Solid Waste Fund Summary

FY 2027 Budget: $6,284,164



Revenues by Source | **Expenditures by Use**

The Solid Waste Fund accounts for fees received from users of the city's residential solid waste program (i.e., garbage, yard waste, and recycling collection).

Services are provided on a user-charge basis and managed through a contract with a private sanitation hauler (Republic Services). The Finance Department manages the Solid Waste Program including billing, collection, and customer service functions. Commercial solid waste customers are authorized to contract commercial solid waste collection and disposal services from any contractor that has obtained a solid waste collection permit from the city.

Trends

The FY 2027 Budget for the Solid Waste Fund totals $6.3 million and represents an increase of 1%, or $86,596, compared to FY 2026 due primarily to contractual cost growth for our private sanitation hauler of 4% annually coupled with forecasted growth in the service base which is partially offset through an elimination of downtown sanitation services ($150,000 budget in FY 2026; dumpster locations downtown were transitioned in January 2026 to private restaurant operators through a permit process and said operators now pay for trash service directly with the carriers).

As it relates to private sanitation hauler services, the City issued an RFP in 2021 for sanitation services to ensure optimal value for customers. Republic Services (our current provider) was the highest-ranking vendor and the most cost effective ($1 million lower on

an annual basis than other proposers). Republic Services was awarded the contract with an annual 4% inflation adjustment.

The Personnel Services category is flat, or +$254, due to multiple factors including:

- 3% performance-based merit program, coupled with targeted market-based compensation adjustments (2%, where applicable), scheduled for July 1, 2026.
- Market growth in group insurance costs (e.g. health, dental, vision), pension costs, etc., changes in staff benefit options (e.g. employee-only vs family coverage, etc.), and adjustments in the monetary value of employee service awards which had not changed in over 15 years (e.g., 5-year service award increased from $50 to $125).
- The above is offset through staff turnover and associated changes in salary, benefit elections, etc.

Authorized personnel total 1.0 FTE and represent the following:

	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Variance
Customer Account Representative	1.0	1.0	1.0	1.0	1.0	-
	1.0	1.0	1.0	1.0	1.0	-

The Maintenance and Operations category increased 1%, or $86,342, due primarily to contractual cost growth for our private sanitation hauler of 4% annually coupled with forecasted growth in the service base and offset through the elimination of downtown sanitation services as previously discussed.



Statement of Budgetary Comparisons

Solid Waste Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Charges for Services:					
Collection Fees	$ 5,110,565	$ 5,394,125	$ 5,716,024	$ 6,059,000	$ 6,218,000
Commercial Hauler Fees	22,731	21,868	19,478	26,000	20,000
Penalties and Interest	35,045	35,253	35,890	20,000	25,000
Investment Earnings	15,066	47,253	65,485	17,568	21,164
Other					
Miscellaneous	1,405	(175)	-	-	-
General Fund Subsidy	-	-	-	75,000	-
TOTAL	**$ 5,184,812**	**$ 5,498,325**	**$ 5,836,878**	**$ 6,197,568**	**$ 6,284,164**
EXPENDITURES					
Personnel Services:					
Salaries	$ 38,462	$ 53,081	$ 58,060	$ 60,521	$ 58,511
Overtime	-	258	-	500	-
Group Insurance	21,363	20,537	20,353	23,258	26,651
FICA	2,681	3,908	4,120	4,668	4,476
Pension (401A Cont./Match)	5,441	7,709	8,287	9,015	8,709
Miscellaneous	2,376	2,692	2,847	2,843	2,712
subtotal	*$ 70,322*	*$ 88,185*	*$ 93,667*	*$ 100,805*	*$ 101,059*
Maintenance & Operations:					
Professional Services (e.g. haulers)	$ 5,156,260	$ 5,289,016	$ 5,630,760	$ 6,005,400	$ 6,091,400
Miscellaneous	63,265	116,713	58,239	91,363	91,705
subtotal	*$ 5,219,526*	*$ 5,405,729*	*$ 5,688,999*	*$ 6,096,763*	*$ 6,183,105*
Non-Allocated					
Reserve	$ -	$ -	$ -	$ -	$ -
subtotal	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
TOTAL	**$ 5,289,848**	**$ 5,493,914**	**$ 5,782,666**	**$ 6,197,568**	**$ 6,284,164**

Statement of Revenues, Expenditures, and changes in Fund Balance

Solid Waste Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$ 115,975	$ 10,939	$ 15,349	$ 69,560	$ 69,560
REVENUES BY CATEGORY					
Charges for Services	$ 5,168,342	$ 5,451,247	$ 5,771,392	$ 6,105,000	$ 6,263,000
Investment Earnings	15,066	47,253	65,485	17,568	21,164
Other	1,405	(175)	-	75,000	-
TOTAL	**$ 5,184,812**	**$ 5,498,325**	**$ 5,836,878**	**$ 6,197,568**	**$ 6,284,164**
EXPENDITURES BY FUNCTION					
Solid Waste Operations	$ 5,289,848	$ 5,493,914	$ 5,782,666	$ 6,197,568	$ 6,284,164
TOTAL	**$ 5,289,848**	**$ 5,493,914**	**$ 5,782,666**	**$ 6,197,568**	**$ 6,284,164**
ACFR Rounding Adjustments	$ (1)	$ (1)	$ -	$ -	$ -
Ending Fund Balance: (1),(2)	$ 10,939	$ 15,349	$ 69,560	$ 69,560	$ 69,560
Changes in Fund Balance (actual/est.)	$ (105,036)	$ 4,410	$ 54,211	$ -	$ -

Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/Reserve accounts.

(2) Fund balance utilization in FY 2023 was to subsidize operations.

Internal Service Fund Summaries

Overview

The *Internal Service Fund Summaries* section is intended to provide readers with an overall understanding of the respective fiscal year 2027 budgets for the city's Internal Service Funds.

Internal Service Funds are used to accumulate and allocate costs internally among the city's various functions and utilize the accrual basis of budgeting and accounting.

The following schedules provide readers with revenue and expenditure summaries/narratives from several different perspectives including:

- **Fund Summary**

  This section provides a brief description of the Fund.

- **Statement of Budgetary Comparisons**

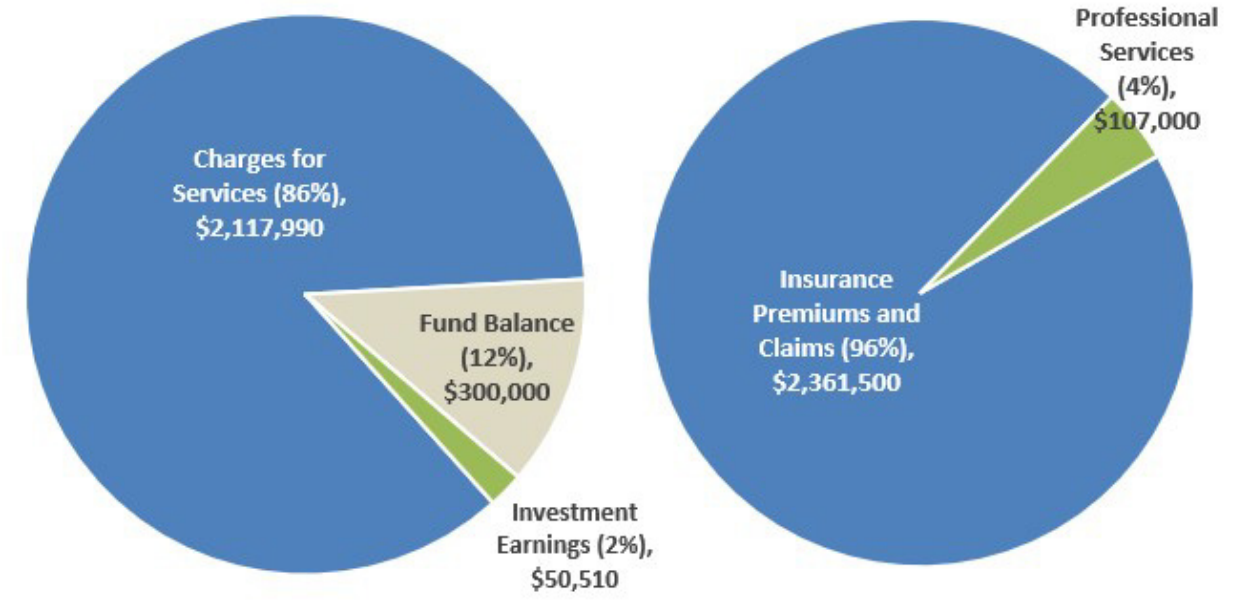
  This statement provides a detailed comparison of revenues and expenditures across multiple fiscal years. Revenues are presented by source and expenditures are presented by use.

- **Statement of Revenues, Expenditures, and changes in Fund Balances**

  This statement provides a historical comparison of revenues and expenditures for fiscal years 2023-2027. Also included are changes in fund balance. The financial forecast utilizes revenue collection patterns (historical and current patterns as adjusted for seasonal fluctuations), expenditure trends and mandates, etc.

Risk Management Fund Summary

FY 2027 Budget: $2,468,500



Revenues by Source | **Expenditures by Use**

The Risk Management Fund accounts for expenses related to providing and administering the general liability, automotive liability, workers' compensation, and property insurance coverage for the city. Funding is provided through an (approximate) 2% charge per employee (based on salary) for workers' compensation coupled with funding from the General Fund for insurance premiums. The Finance Department manages the Risk Management Program including all workers' compensation, general liability, and other insurance claims.

Trends

The FY 2027 Budget for the Risk Management Fund totals $2.5 million and represents a decrease of -41%, or -$1.7 million, compared to FY 2026. The main driver of this variance is the non-allocated reserve (i.e., available fund balance) budgeted in FY 2026[17]. After adjusting for the non-allocated reserve, the true operational budget change is 8% compared with 2026 and reflective of insurance premium and claims funding fluctuations.

[17] Annually after the year-end accrual period (i.e., September), the city carries-forward available fund balance and places in a Non-Allocated Reserve account. The purpose is to provide elected officials, city staff, citizens, and stakeholders with a transparent view of the funding available for future initiatives. The carry-forward for FY 2027 will occur subsequent to adoption of the budget.

Statement of Budgetary Comparisons

Risk Management Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Charges for Services:					
Risk Management Allocations	$ 855,000	$ 832,136	$ 820,436	$ 891,079	$ 911,490
Insurance Premium Funding	823,300	928,885	966,800	1,060,500	1,206,500
Investment Earnings	54,868	122,202	120,591	60,921	50,510
Other					
Insurance Proceeds	210,549	212,067	153,475	-	-
Fund Balance	-	-	-	2,154,322	300,000
TOTAL	**$ 1,943,717**	**$ 2,095,290**	**$ 2,061,302**	**$ 4,166,822**	**$ 2,468,500**
EXPENDITURES					
Maintenance & Operations:					
Professional Services	$ 75,694	$ 75,989	$ 75,277	$ 92,000	$ 107,000
Insurance Premiums					
Vehicle	245,445	289,590	369,846	410,000	447,000
Property/Equipment	108,596	116,780	124,257	202,416	223,000
Condo	62,950	43,614	51,681	48,000	58,000
Fine Art	3,201	3,425	3,665	4,000	4,500
General Liability	57,118	63,158	80,330	98,120	104,000
Law Enforcement Liability	81,694	143,466	150,032	160,808	170,000
Public Entity Liability	58,486	93,798	100,160	111,074	120,000
Workers Comp Excess	141,502	165,870	188,062	212,262	225,000
Criminal Liability	4,748	4,748	4,513	5,000	5,000
Cyber Liability	78,156	65,704	72,910	73,003	85,000
Umbrella Liability	69,472	89,758	27,690	40,000	45,000
Medical Services (PS Custody)	3,594	1,024	23,720	20,000	20,000
Claims/Judgments	264,190	768,437	835,176	846,432	855,000
subtotal	*$ 1,254,846*	*$ 1,925,361*	*$ 2,107,319*	*$ 2,323,115*	*$ 2,468,500*
Non-Allocated					
Reserve	$ -	$ -	$ -	$ 1,843,707	$ -
subtotal	*$ -*	*$ -*	*$ -*	*$ 1,843,707*	*$ -*
TOTAL	**$ 1,254,846**	**$ 1,925,361**	**$ 2,107,319**	**$ 4,166,822**	**$ 2,468,500**

Statement of Revenues, Expenditures, and changes in Fund Balance

Risk Management Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$ 1,341,541	$ 2,030,413	$ 2,200,341	$ 2,154,324	$ 1,843,709
REVENUES BY CATEGORY					
Charges for Services	$ 1,678,300	$ 1,761,021	$ 1,787,236	$ 1,951,579	$ 2,117,990
Investment Earnings	54,868	122,202	120,591	60,921	50,510
Other	210,549	212,067	153,475	-	-
TOTAL	**$ 1,943,717**	**$ 2,095,290**	**$ 2,061,302**	**$ 2,012,500**	**$ 2,168,500**
EXPENDITURES BY USE					
Insurance Premiums/Claims	$ 1,179,152	$ 1,849,372	$ 2,032,042	$ 2,231,115	$ 2,361,500
Professional Services	75,694	75,989	75,277	92,000	107,000
TOTAL	**$ 1,254,846**	**$ 1,925,361**	**$ 2,107,319**	**$ 2,323,115**	**$ 2,468,500**
ACFR Rounding Adjustments	$ 1	$ (1)	$ -	$ -	$ -
Ending Fund Balance: (1),(2)	$ 2,030,413	$ 2,200,341	$ 2,154,324	$ 1,843,709	$ 1,543,709
Changes in Fund Balance (actual/est.)	$ 688,872	$ 169,928	$ (46,017)	$ (310,615)	$ (300,000)

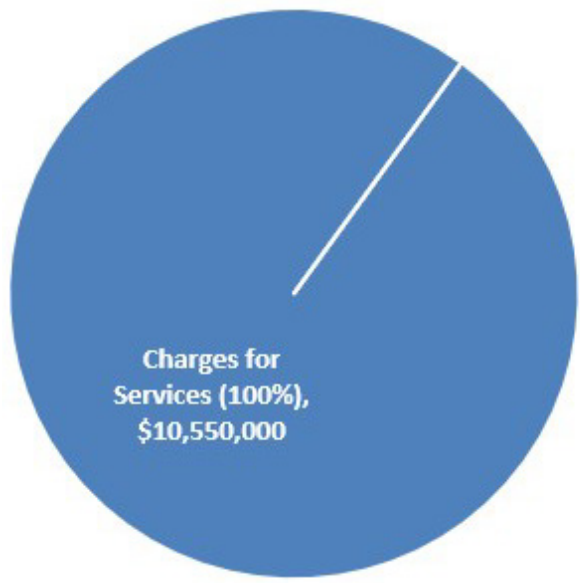
Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/Reserve accounts.

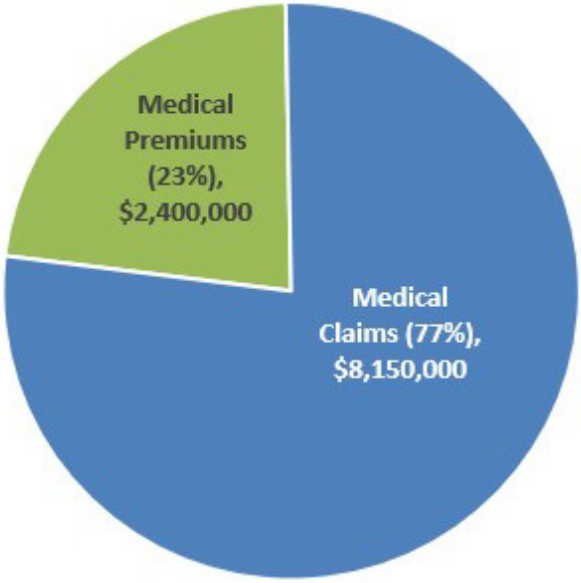
(2) Available Fund Balance was used in FY 2025 and is forecasted to be used in FYs 2026-2027 to supplement insurance premiums and claims/judgements.

Medical Insurance Fund Summary

FY 2027 Budget: $10,550,000



Revenues by Source



Expenditures by Use

The Medical Insurance Fund accounts for activity under the City's Minimum Premium Plan (MPP) in accordance with Generally Accepted Accounting Principles.

Accounting rules dictate the creation of an Internal Service Fund to track activity under an MPP. As such, this fund does not represent new costs. Rather, it represents a flow of funds from the Operating Funds (e.g., employer/employee premiums) that does have the effect of grossing-up the totals as the appropriations are reflected in multiple Funds.

Under the MPP, the City and the medical insurer (CIGNA) agree that the City will be responsible for paying all claims up to an agreed-upon aggregate level, with the insurer responsible for the excess. The insurer will continue to process claims and administrative services. Through the MPP arrangement, the City can reduce premium taxes while maintaining coverage benefits. The MPP is still a fully insured medical plan.

Trends

The FY 2027 Budget totals $10.6 million and represents premiums (employer and employee) and the associated expenditures (administration, claims, and reserves). The operating funds (e.g., General Fund, E911 Fund, DEA Fund, and Sanitation Fund) all include group insurance expenses that represent the city's costs.

Statement of Budgetary Comparisons

Medical Insurance Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Charges for Services:					
Medical Insurance Premiums					
Employer Contribution	$ 7,327,558	$ 7,269,126	$ 7,812,849	$ 9,100,000	$ 9,500,000
Employee Contribution	736,897	744,969	784,484	950,000	1,050,000
Other					
Fund Balance	-	-	-	91,269	-
TOTAL	**$ 8,064,455**	**$ 8,014,095**	**$ 8,597,333**	**$ 10,141,269**	**$ 10,550,000**
EXPENDITURES					
Maintenance & Operations:					
Medical Premiums	$ 1,879,540	$ 2,084,735	$ 2,262,854	$ 2,300,000	$ 2,400,000
Medical Claims	6,068,704	5,941,927	6,306,251	7,750,000	8,150,000
subtotal	*$ 7,948,244*	*$ 8,026,662*	*$ 8,569,105*	*$ 10,050,000*	*$ 10,550,000*
Non-Allocated					
Reserve	$ -	$ -	$ -	$ 91,269	$ -
subtotal	*$ -*	*$ -*	*$ -*	*$ 91,269*	*$ -*
TOTAL	**$ 7,948,244**	**$ 8,026,662**	**$ 8,569,105**	**$ 10,141,269**	**$ 10,550,000**

Statement of Revenues, Expenditures, and changes in Fund Balance

Medical Insurance Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$ (40,603)	$ 75,608	$ 63,041	$ 91,269	$ 91,269
REVENUES BY CATEGORY					
Charges for Services	$ 8,064,455	$ 8,014,095	$ 8,597,333	$ 10,050,000	$ 10,550,000
TOTAL	**$ 8,064,455**	**$ 8,014,095**	**$ 8,597,333**	**$ 10,050,000**	**$ 10,550,000**
EXPENDITURES BY USE					
Medical Premiums/Claims	$ 7,948,244	$ 8,026,662	$ 8,569,105	$ 10,050,000	$ 10,550,000
TOTAL	**$ 7,948,244**	**$ 8,026,662**	**$ 8,569,105**	**$ 10,050,000**	**$ 10,550,000**
ACFR Rounding Adjustments	$ -	$ (1)	$ -	$ -	$ -
Ending Fund Balance: (1),(2)	$ 75,608	$ 63,041	$ 91,269	$ 91,269	$ 91,269
Changes in Fund Balance (actual/est.)	$ 116,211	$ (12,568)	$ 28,228	$ -	$ -

Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/Reserve accounts.

Fiduciary Fund Summaries

Overview

The *Fiduciary Fund Summaries* section is intended to provide readers with an overall understanding of the respective fiscal year 2027 budgets for the Other Post Employment Benefit (OPEB) Funds.

Fiduciary Funds are used to account for resources held for the benefit of parties outside the government. Fiduciary funds utilize the accrual basis of accounting.

The following schedules provide readers with revenue and expenditure summaries/narratives from several different perspectives including:

- **Fund Summary**

  This section provides a brief description of the Fund.

- **Statement of Budgetary Comparisons**

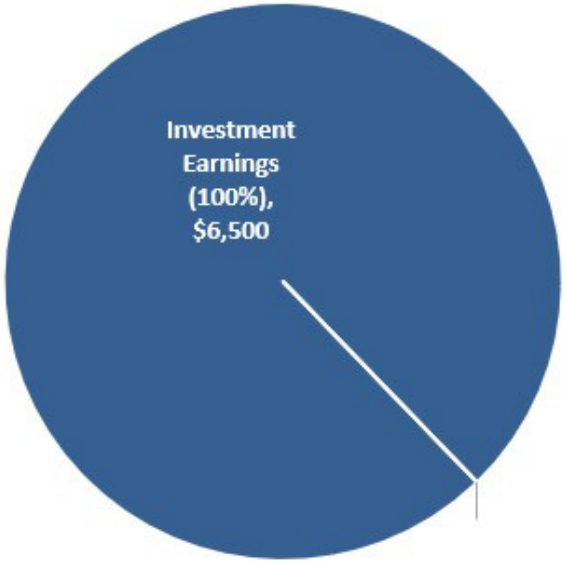
  This statement provides a detailed comparison of revenues and expenditures across multiple fiscal years. Revenues are presented by source, and expenditures are presented by use.

- **Statement of Revenues, Expenditures, and changes in Fund Balances**

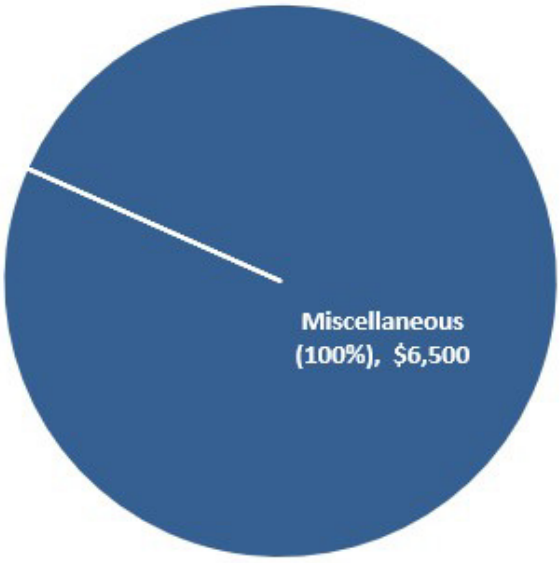
  This statement provides a historical comparison of revenues and expenditures for fiscal years 2023-2027. Also included are changes in fund balance. The financial forecast utilizes revenue collection patterns (historical and current patterns as adjusted for seasonal fluctuations), expenditure trends and mandates, etc.

Other Post Employment Benefit (OPEB) Plan Trust Fund Summary

FY 2027 Budget: $6,500



Revenues by Source



Expenditures by Use

The OPEB Plan Trust Fund represents activity associated with the other post-employment benefit plan (OPEB). Eligible retirees are offered the same health and prescription drug coverage as active employees. Each fiscal year, the city determines the Plan benefits and premium rate for participants (active and retirees). However, unlike active employees, retirees pay 100% of the blended premium afforded to the city. Therefore, as the retiree makes the full premium payment, the city's only exposure is the accounting treatment of this implicit rate subsidy caused by the difference in the blended rate offered to the retiree and his/her actual age adjusted premium. Coverage expires at age 65.

Please note, recent updates to the Plan, previously approved by City Council, have removed this option for employees ending service with the City on or after July 1, 2023.

OPEB related funding for FY 2027 is funded through anticipated utilization of fund balance (existing resources). Specifically, the Actuarially Determined Contribution for 2027 is $0; hence the utilization of fund balance to cover premium expenses in 2027.

Statement of Budgetary Comparisons

OPEB Plan Trust Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Investment Earnings	$ 218,138	$ 430,865	$ 6,424	$ -	$ 6,500
Other					
OPEB Health Benefit Funding Employer Contribution	13,008	-	-	-	-
Miscellaneous Revenue	21,965	-	-	-	-
Fund Balance	-	-	-	398,752	-
TOTAL	**$ 253,111**	**$ 430,865**	**$ 6,424**	**$ 398,752**	**$ 6,500**
EXPENDITURES					
Maintenance & Operations:					
OPEB Health Benefit	$ 47,545	$ 46,754	$ 39,983	$ -	$ -
Miscellaneous	23,331	17,228	18,492	-	6,500
subtotal	*$ 70,876*	*$ 63,982*	*$ 58,475*	*$ -*	*$ 6,500*
Other					
Transfer to OPEB Health Reimbursement Fund	$ -	$ 1,475,506	$ 216,579	$ -	$ -
subtotal	*$ -*	*$ 1,475,506*	*$ 216,579*	*$ -*	*$ -*
Non-Allocated					
Reserve	$ -	$ -	$ -	$ 398,752	$ -
subtotal	*$ -*	*$ -*	*$ -*	*$ 398,752*	*$ -*
TOTAL	**$ 70,876**	**$ 1,539,488**	**$ 275,054**	**$ 398,752**	**$ 6,500**

Statement of Revenues, Expenditures, and changes in Fund Balance

OPEB Plan Trust Fund

Finance Department

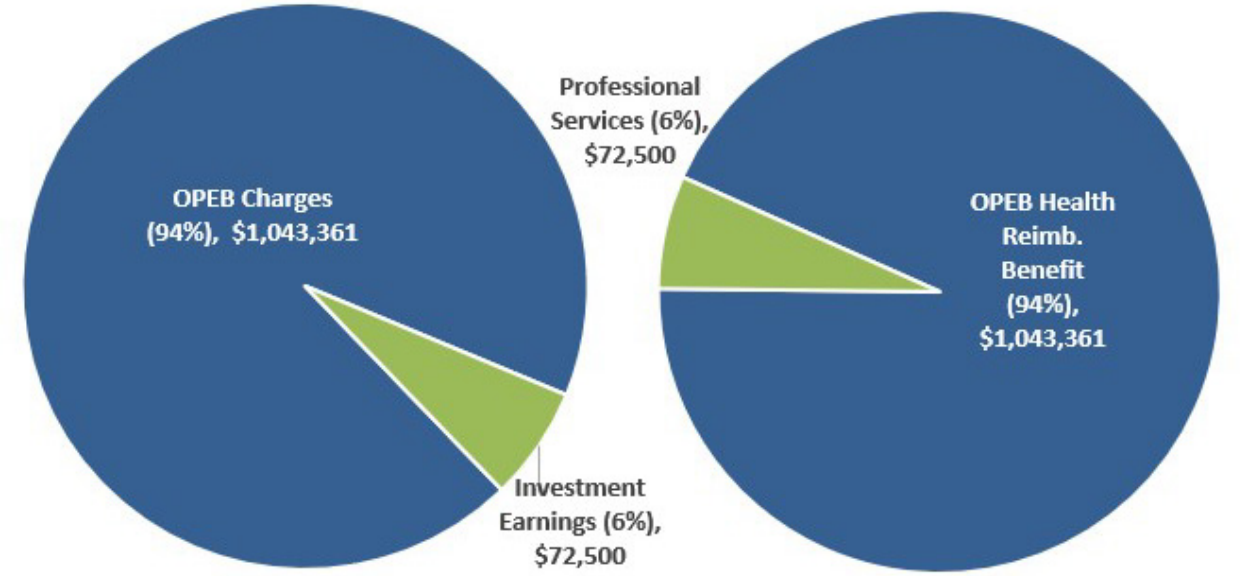
	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$1,593,770	$ 1,776,006	$ 667,382	$ 398,752	$ 398,752
REVENUES BY CATEGORY					
OPEB Health Benefit Funding	$ 13,008	$ -	$ -	$ -	$ -
Investment Earnings	218,138	430,865	6,424	-	6,500
Other	21,965	-	-	-	-
TOTAL	**$ 253,111**	**$ 430,865**	**$ 6,424**	**$ -**	**$ 6,500**
EXPENDITURES BY USE					
OPEB Health Benefit	$ 47,545	$ 46,754	$ 39,983	$ -	$ -
Miscellaneous (Professional Services)	23,331	17,228	18,492	-	6,500
TOTAL	**$ 70,876**	**$ 63,982**	**$ 58,475**	**$ -**	**$ 6,500**
OTHER					
Transfer to OPEB Health Reimbursement Fund	$ -	$ 1,475,506	$ 216,579	$ -	$ -
subtotal	*$ -*	*$ 1,475,506*	*$ 216,579*	*$ -*	*$ -*
ACFR Rounding Adjustments	$ 1	$ (1)	$ -	$ -	$ -
Ending Fund Balance: (1)	$1,776,006	$ 667,382	$ 398,752	$ 398,752	$ 398,752
Changes in Fund Balance (actual/est.)	$ 182,236	$(1,108,624)	$ (268,630)	$ -	$ -

Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/Reserve accounts. It should be noted that the fund balance figures represent funding for the OPEB Trust.

Other Post Employment Benefit (OPEB) Retirement Reimbursement Plan Trust Fund Summary

FY 2027 Budget: $1,115,861



Revenues by Source | **Expenditures by Use**

Starting with Fiscal Year 2019, the city implemented a new post-employment healthcare benefit to assist our employees in funding one of their primary cost drivers during retirement, healthcare.

Costs for this benefit approximate 2.5% of payroll ($1 million citywide for FY 2027) and require a minimum 15-year vesting (maximum benefit achieved at 25-years[18]) which assists in not only recruitment, but also in retention of our most valuable assets, our employees.

[18] Credited years-of-service for current employees will count towards vesting (subject to a maximum of 15-years).

Statement of Budgetary Comparisons

OPEB Health Reimbursement Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
REVENUES					
Investment Earnings	$ 704,445	$ 943,053	$ 1,355,813	$ 55,500	$ 72,500
Other					
OPEB Health Reimbursement Funding					
Employer Contribution	686,459	926,297	988,436	977,678	1,043,361
Transfer-In					
OPEB Health Fund	-	1,475,506	216,579	-	-
Fund Balance	-	-	-	8,106,439	-
TOTAL	**$ 1,390,904**	**$ 3,344,856**	**$ 2,560,828**	**$ 9,139,617**	**$ 1,115,861**
EXPENDITURES					
Maintenance & Operations:					
OPEB Reimbursement Benefit	$ 118,012	$ 163,978	$ 5,285	$ 977,678	$ 1,043,361
Miscellaneous	76,620	84,109	64,501	55,500	72,500
subtotal	*$ 194,632*	*$ 248,088*	*$ 69,786*	*$ 1,033,178*	*$ 1,115,861*
Non-Allocated					
Reserve	$ -	$ -	$ -	$ 8,106,439	$ -
subtotal	*$ -*	*$ -*	*$ -*	*$ 8,106,439*	*$ -*
TOTAL	**$ 194,632**	**$ 248,088**	**$ 69,786**	**$ 9,139,617**	**$ 1,115,861**

Statement of Revenues, Expenditures, and changes in Fund Balance

OPEB Health Reimbursement Fund

Finance Department

	FY 2023 Actual	FY 2024 Actual	FY 2025 Actual	FY 2026 Amended Budget	FY 2027 Recommended Budget
Beginning Fund Balance:	$ 4,025,890	$ 5,222,162	$ 8,318,930	$10,809,971	$ 10,809,971
REVENUES BY CATEGORY					
OPEB Health Reimb. Benefit Funding	$ 686,459	$ 926,297	$ 988,436	$ 977,678	$ 1,043,361
Investment Earnings	704,445	943,053	1,355,813	55,500	72,500
TOTAL	**$ 1,390,904**	**$ 3,344,856**	**$ 2,560,828**	**$ 1,033,178**	**$ 1,115,861**
EXPENDITURES BY USE					
OPEB Health Reimb. Benefit	$ 118,012	$ 163,978	$ 5,285	$ 977,678	$ 1,043,361
Miscellaneous (Professional Services)	76,620	84,109	64,501	55,500	72,500
TOTAL	**$ 194,632**	**$ 248,088**	**$ 69,786**	**$ 1,033,178**	**$ 1,115,861**
ACFR Adjustments	$ -	$ -	$ (1)	$ -	$ -
Ending Fund Balance: (1)	$ 5,222,162	$ 8,318,930	$10,809,971	$10,809,971	$ 10,809,971
Changes in Fund Balance (actual/est.)	$ 1,196,272	$ 3,096,768	$ 2,491,040	$ -	$ -

Notes:

(1) In order to accurately measure anticipated fund balance usage, this schedule omits Carryforward Fund Balance and Non-Allocated/Reserve accounts. It should be noted that the fund balance figures represent funding for the OPEB Trust.

Appendix A (Detailed 5-Year CIP)

Capital Improvement Plan (CIP)

The city's five-year capital improvement plan is included herein. The CIP forecasts the city's available funding for capital investment over a five-year period and provides a preliminary project prioritization (subject to adjustment in future years). These figures do not include the city's existing capital initiatives (i.e., initiatives funded prior to FY 2027) and do not represent full funding of departmental capital project requests.

Capital investments for Fiscal Year 2027 are appropriated as part of the FY 2027 Budget. These appropriations are detailed within the *Capital Project Fund Summaries* section of this document.

Capital plans for Fiscal Years 2028 through 2031 are presented for planning purposes only and do not constitute formal appropriations. The CIP is inherently a dynamic planning tool—new projects may be introduced as priorities evolve, while others may be deferred or removed from consideration.

The last column represents additional capital requests for the FY 2027–2031 period that currently lack an identified funding source. These projects may be funded in the future based on City Council and staff prioritization, as well as the availability of financial resources. Additionally, some FY 2027 capital requests that are presently unfunded are anticipated to receive funding during the later years of the plan (FY 2028–2031).

THE CITY OF
ALPHARETTA
GEORGIA

APPENDIX A (DETAILED 5-YEAR CIP)

5-Year CIP Summary

FY 2027-2031 Capital Improvement Plan

April 28, 2026

	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total
Sources						
General Fund (Annual Appropriation)	$ 475,000	$ 484,500	$ 494,190	$ 504,074	$ 514,155	$ 2,471,919
General Fund (Fund Balance)	5,661,572	9,369,363	7,450,310	7,643,538	8,205,549	38,330,332
General Fund (Tree Bank)	-	150,000	75,000	75,000	75,000	375,000
	$ 6,136,572	$ 10,003,863	$ 8,019,500	$ 8,222,612	$ 8,794,704	$ 41,177,251
Other Funds (Investment Earnings) - not incl. TSPLOST	$ 500,000	$ 480,000	$ 480,000	$ 480,000	$ 480,000	$ 2,420,000
Other Funds (Fund Balance) - not incl. TSPLOST	3,950,000	-	-	-	-	3,950,000
Impact Fees	2,500,000	-	-	-	-	2,500,000
Hotel Fund (TPD; Wayfinding Monuments)	-	125,000	600,000	-	-	725,000
TSPLOST 1 and 2 (TSPLOST, Investment Earnings)	19,589,099	-	-	-	-	19,589,099
TSPLOST 3 (forecast)	-	60,888,767	-	10,745,076	-	71,633,843
	$ 26,539,099	$ 61,493,767	$ 1,080,000	$ 11,225,076	$ 480,000	$ 100,817,942
Capital Lease						
Capital Lease (ESPC): City Facility Preventative Maintenance Assessment and Implementation	$ 2,275,000	$ -	$ -	$ -	$ -	$ 2,275,000
Fire Extrication Equipment Replacements	-	179,000	-	-	-	179,000
Portable (Handheld) Radios Replacement	-	-	1,766,000	-	-	1,766,000
Mobile (Vehicle) Radio Replacements	-	-	600,000	-	-	600,000
Fleet Replacement: Fire Apparatus Replacements	-	-	-	800,000	-	800,000
Heart Monitor & AEDs Replacements	-	-	-	-	700,000	700,000
Grant/Contribution						
LMIG (Milling and Resurfacing)	731,300	753,200	775,800	799,100	823,100	3,882,500
LRA (Milling and Resurfacing)	838,403	-	-	-	-	838,403
	$ 3,844,703	$ 932,200	$ 3,141,800	$ 1,599,100	$ 1,523,100	$ 11,040,903
Total Sources	**$ 36,520,374**	**$ 72,429,830**	**$ 12,241,300**	**$ 21,046,788**	**$ 10,797,804**	**$ 153,036,096**

	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total
Uses (by Department)						
Economic Development	$ 100,000	$ 100,000	$ 200,000	$ 100,000	$ 100,000	$ 600,000
Information Technology	567,800	955,800	614,000	422,300	1,270,800	3,830,700
Police	1,556,249	2,185,000	4,636,000	2,355,000	2,446,000	13,178,249
Fire	-	600,750	441,838	1,262,804	1,107,195	3,412,587
Public Works	13,226,300	66,486,467	3,797,300	14,971,776	3,236,900	101,718,743
Recreation, Parks & Cultural Services	2,862,500	1,738,000	1,757,000	1,718,000	1,945,000	10,020,500
Community Development	-	361,200	752,500	154,900	458,800	1,727,400
Total Uses	**$ 18,312,849**	**$ 72,427,217**	**$ 12,198,638**	**$ 20,984,780**	**$ 10,564,695**	**$ 134,488,179**
Non-Allocated (Sources-Uses)	**$ 18,207,525**	**$ 2,613**	**$ 42,662**	**$ 62,008**	**$ 233,109**	**$ 18,547,917**
Total Uses + Non-Allocated	**$ 36,520,374**	**$ 72,429,830**	**$ 12,241,300**	**$ 21,046,788**	**$ 10,797,804**	**$ 153,036,096**

APPENDIX A (DETAILED 5-YEAR CIP)

5-Year CIP Detail

FY 2027-2031 Capital Improvement Plan

April 28, 2026

	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total
Sources						
General Fund (Annual Appropriation)	$ 475,000	$ 484,500	$ 494,190	$ 504,074	$ 514,155	$ 2,471,919
General Fund (Fund Balance)	5,661,572	9,369,363	7,450,310	7,643,538	8,205,549	38,330,332
General Fund (Tree Bank)	-	150,000	75,000	75,000	75,000	375,000
	$ 6,136,572	$ 10,003,863	$ 8,019,500	$ 8,222,612	$ 8,794,704	$ 41,177,251
Other Funds (Investment Earnings) - not incl. TSPLOST	$ 500,000	$ 480,000	$ 480,000	$ 480,000	$ 480,000	$ 2,420,000
Other Funds (Fund Balance) - not incl. TSPLOST	3,950,000	-	-	-	-	3,950,000
Impact Fees	2,500,000	-	-	-	-	2,500,000
Hotel Fund (TPD; Wayfinding Monuments)	-	125,000	600,000	-	-	725,000
TSPLOST 1 and 2 (TSPLOST, Investment Earnings)	19,589,099	-	-	-	-	19,589,099
TSPLOST 3 (forecast)	-	60,888,767	-	10,745,076	-	71,633,843
	$ 26,539,099	$ 61,493,767	$ 1,080,000	$ 11,225,076	$ 480,000	$ 100,817,942
Capital Lease						
Capital Lease (ESPC): City Facility Preventative Maintenance Assessment and Implementation	$ 2,275,000	$ -	$ -	$ -	$ -	$ 2,275,000
Fire Extrication Equipment Replacements	-	179,000	-	-	-	179,000
Portable (Handheld) Radios Replacement	-	-	1,766,000	-	-	1,766,000
Mobile (Vehicle) Radio Replacements	-	-	600,000	-	-	600,000
Fleet Replacement: Fire Apparatus Replacements	-	-	-	800,000	-	800,000
Heart Monitor & AEDs Replacements	-	-	-	-	700,000	700,000
Grant/Contribution						
LMIG (Milling and Resurfacing)	731,300	753,200	775,800	799,100	823,100	3,882,500
LRA (Milling and Resurfacing)	838,403	-	-	-	-	838,403
	$ 3,844,703	$ 932,200	$ 3,141,800	$ 1,599,100	$ 1,523,100	$ 11,040,903
Total Sources	**$ 36,520,374**	**$ 72,429,830**	**$ 12,241,300**	**$ 21,046,788**	**$ 10,797,804**	**$ 153,036,096**

	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total	Add'l CIP Requests (Funding TBD; 2027-2031)
Uses (by Department)							
Economic Development							
Economic Development Toolbox	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 100,000	$ 500,000	$ -
Economic Development Strategic Plan	-	-	100,000	-	-	100,000	-
	$ 100,000	$ 100,000	$ 200,000	$ 100,000	$ 100,000	$ 600,000	$ -
Information Technology							
Technology Replacements (all City Departments)	$ 397,800	$ 405,800	$ 414,000	$ 422,300	$ 430,800	$ 2,070,700	$ -
Citywide Network Devices Replacement	-	350,000	200,000	-	-	550,000	-
City Council A/V Equipment Replacement	-	200,000	-	-	-	200,000	-
Data Center Server Replacement (all City Departments)	-	-	-	-	600,000	600,000	-
(2) Telephony VOIP Network Switches Replacement	-	-	-	-	100,000	100,000	-
(2) Wireless Access Points	-	-	-	-	140,000	140,000	-
Data Center Auxiliary A/C Replacement	45,000	-	-	-	-	45,000	-
AI Strategy (study)	125,000	-	-	-	-	125,000	
	$ 567,800	$ 955,800	$ 614,000	$ 422,300	$ 1,270,800	$ 3,830,700	$ -
Human Resources							
HR Office Improvements	$ -	$ -	$ -	$ -	$ -	$ -	$ 70,000
	$ -	$ -	$ -	$ -	$ -	$ -	$ 70,000

FY 2027-2031 Capital Improvement Plan

April 28, 2026

		FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total	Add'l CIP Requests (Funding TBD; 2027-2031)
Uses (by Department)								
Police								
	Police (Fleet Replacement)	$ 1,481,249	$ 2,110,000	$ 2,195,000	$ 2,280,000	$ 2,371,000	$ 10,437,249	$ -
	Portable (Handheld) Radios (Equipment Replacement)	-	-	1,766,000	-	-	1,766,000	-
	Mobile (Vehicle) Radios (Equipment Replacement)	-	-	600,000	-	-	600,000	-
	Citywide Camera Infrastructure	75,000	75,000	75,000	75,000	75,000	375,000	-
	911 - 24 Hour Console Chair Replacement	-	-	-	-	-	-	32,000
		$ 1,556,249	$ 2,185,000	$ 4,636,000	$ 2,355,000	$ 2,446,000	$ 13,178,249	$ 32,000
Fire								
	Fire (Fleet Replacement)	$ -	$ 421,750	$ 441,838	$ 462,804	$ 407,195	$ 1,733,587	$ -
	Fire Apparatus (Fleet Replacement; Capital Lease)	-	-	-	800,000	-	800,000	-
	Fire Extrication Equipment (Replacement; Capital Lease)	-	179,000	-	-	-	179,000	-
	Heart Monitor (Equipment Replacement; Capital Lease)	-	-	-	-	700,000	700,000	-
	Fire Station Renovations/Improvements	-	-	-	-	-	-	19,334,000
		$ -	$ 600,750	$ 441,838	$ 1,262,804	$ 1,107,195	$ 3,412,587	$ 19,334,000
Public Works								
	Milling and Resurfacing	$ 4,731,300	$ 22,587,467	775,800	799,100	823,100	$ 29,716,767	$ -
	Pavement Resurfacing and Preservation for Parks Locations	-	-	600,000	-	-	600,000	-
	Roadway Pavement Rating and Sidewalk Analysis	-	-	-	450,000	-	450,000	-
	Traffic Striping and Signage	320,000	1,970,000	-	-	-	2,290,000	-
	Signalized Intersection Maintenance (incl. Traffic Control Equipment)	210,000	1,200,000	-	-	-	1,410,000	-
	Bridge and Guardrail Maintenance	250,000	1,366,500	-	-	-	1,616,500	-
	Traffic Calming Improvements	50,000	250,000	-	-	-	300,000	-
	Traffic Signal Pole Maintenance	150,000	750,000	-	-	-	900,000	-
	Streetlight Maintenance	-	498,000	-	-	-	498,000	-
	Traffic Responsive System Maintenance	-	400,000	-	-	-	400,000	-
	Sidewalk and Brick Paver Maintenance and Repair	750,000	2,250,000	-	-	-	3,000,000	-
	Tree Planting and Landscape Improvements	-	180,000	185,000	190,000	195,000	750,000	-
(1)	Stormwater	1,500,000	1,000,000	1,000,000	1,000,000	1,500,000	6,000,000	14,230,000
	Department Pool Vehicles (Fleet Replacement)	95,000	-	40,000	-	-	135,000	-
	F-150 Truck (Fleet Replacement)	220,000	70,000	150,000	150,000	130,000	720,000	-
	F-250 Crew Cab Service Truck (Fleet Replacement)	80,000	-	-	-	90,000	170,000	-
	F-350 Crew Cab Service Bed Truck (Fleet Replacement)	85,000	-	-	-	-	85,000	-
	F-450 Crew Cab Dump Truck (Fleet Replacement)	-	90,000	-	-	-	90,000	-
	F-550 Crew Cab Dump Truck (Fleet Replacement)	200,000	250,000	125,000	125,000	-	700,000	-
	F-750 Trucks (Fleet Replacement)	-	270,000	-	-	-	270,000	-
(2)	Tandem Dump Truck (Fleet Replacement)	-	400,000	-	-	-	400,000	-
	Trailers (Equipment Replacement)	30,000	35,000	40,000	-	-	105,000	-
	Variable Message Boards (Equipment Replacement)	-	54,000	-	-	-	54,000	-
	Asphalt Paver (Equipment Replacement/Upgrade)	240,000	-	-	-	-	240,000	-
	General Equipment Replacement (Public Works)	-	145,000	-	-	-	145,000	-
	Winter Weather Equipment Storage	45,000	-	-	-	-	45,000	-
	City Facility Preventative Maintenance Assessment and Implementation	3,425,000	150,000	150,000	150,000	150,000	4,025,000	-
	Police Headquarters (Facility Maintenance/Improvements)	200,000	160,000	160,000	160,000	-	680,000	-
	Fire Facilities (Facility Maintenance/Improvements)	40,000	40,000	50,000	40,000	30,000	200,000	-

FY 2027-2031 Capital Improvement Plan

April 28, 2026

		FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total	Add'l CIP Requests (Funding TBD; 2027-2031)
Uses (by Department)								
Public Works *continued*								
	Fire Facilities (Roof Repairs/Replacements and Wall Restoration)	90,000	160,000	80,000	-	-	330,000	-
	City Hall (Facility Maintenance/Improvements)	35,000	35,500	36,500	37,600	38,800	183,400	-
	City Hall (Roof Repairs/Replacements and Wall Restoration)	-	275,000	-	-	-	275,000	-
	Recreation Facilities (Facility Maintenance/Improvements)	50,000	50,000	50,000	50,000	-	200,000	-
	Recreation Facilities (Roof Repairs/Replacements and Wall Restoration)	-	-	-	800,000	-	800,000	-
(2)	Public Works Headquarters (Facility Maintenance/Improvements)	-	80,000	80,000	-	80,000	240,000	-
	Public Works Headquarters (Roof Repairs/ Replacements and Wall Restoration)	-	1,200,000	75,000	-	-	1,275,000	-
	Parking Garages (Facility Maintenance/Improvements)	125,000	50,000	50,000	125,000	50,000	400,000	-
	HVAC Replacements (Facility Maintenance/Improvements)	165,000	100,000	100,000	100,000	100,000	565,000	-
	Generator Replacements (Facility Maintenance/Improvements)	100,000	-	-	-	-	100,000	-
	City Hall (New Generator and Enclosure)	-	-	-	-	-	-	1,300,000
	Alpharetta Community Center (New Generator)	-	-	-	-	-	-	375,000
	Police Headquarters (Parking Maintenance/Expansion)	-	-	-	-	-	-	620,000
	Alpharetta Arts Center (Parking Expansion)	-	-	-	-	-	-	950,000
	City Center Decorative Sign Posts	-	-	-	-	-	-	140,000
	Streetlight Expansion	-	370,000	-	-	-	370,000	-
	Academy St Improvements (TSPLOST 3)	-	-	-	-	-	-	6,000,000
	Brookside Pkwy Corridor Improvements (TSPLOST 3)	-	8,000,000	-	-	-	8,000,000	-
	Canton St – Hopewell Road Improvements (TSPLOST 3)	-	-	-	-	-	-	9,500,000
	Charlotte Drive Mini-Roundabout (design/temporary install)	-	-	-	-	-	-	25,000
	Charlotte Drive Mini Roundabout (TSPLOST 3)	-	-	-	-	-	-	500,000
	Douglas Rd (Traffic Calming; Design)	-	-	-	-	-	-	200,000
	Encore Pkwy 2-Way Bike Lane	-	-	-	-	-	-	1,500,000
	Haynes Bridge Rd Widening (Mansell Rd to city limits)	-	-	-	-	-	-	8,000,000
	Haynes Bridge Rd at Mansell Road Improvements (TSPLOST 3)	-	-	-	-	-	-	2,000,000
	Haynes Bridge Rd Lane Diet and Linear Park (OMP to Rainwater)	-	-	-	-	-	-	6,750,000
	Hembree Rd Corridor Improvements (TSPLOST 3)	-	3,500,000	-	-	-	3,500,000	-
	Henderson Pkwy Traffic Calming (study)	-	-	-	-	-	-	50,000
	Hopewell Rd at Vaughan Dr (TSPLOST 2; Roundabout)	-	-	-	-	-	-	1,500,000
(1)	Kimball Bridge Rd Widening (TSPLOST 3)	-	-	-	4,750,000	-	4,750,000	7,250,000
	Mansell Rd Improvements (TSPLOST 3)	-	-	-	3,250,000	-	3,250,000	-
	Mayfield Rd at Canton St Intersection Improvements (Design)	-	-	-	-	-	-	80,000
	Mayfield Rd at Providence Rd (TSPLOST 2; Roundabout)	-	-	-	-	-	-	2,000,000
	Mayfield Rd Improvements (TSPLOST 3)	-	5,000,000	-	-	-	5,000,000	-
	Milton Ave at Canton/Roswell St Intersection Improvements (Design)	-	-	-	-	-	-	50,000

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		FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total	Add'l CIP Requests (Funding TBD; 2027-2031)
Uses (by Department)								
Public Works *continued*								
	Milton Ave Streetscape (TSPLOST 2)	-	-	-	-	-	-	3,935,740
	Roswell St/Old Roswell St Intersection Improvements (Design)	-	-	-	-	-	-	50,000
	Southlake Dr (Traffic Calming)	-	-	-	-	-	-	2,000,000
	Traffic Calming (TSPLOST 3)	-	-	-	-	-	-	5,000,000
	Waters Rd (Traffic Calming)	-	-	-	-	-	-	2,000,000
	Windward Pkwy at Clubhouse Dr Intersection Improvements (Design)	-	-	-	-	-	-	50,000
	Roundabout Studies	-	-	-	-	-	-	100,000
	Alpha Loop Extension on Northwinds Parkway (TSPLOST 3)	-	3,500,000	-	-	-	3,500,000	-
	Westside Parkway Alpha Loop (TSPLOST 3)	-	6,000,000	-	-	-	6,000,000	-
	Big Creek Greenway Boardwalk (TSPLOST 3)	-	-	-	-	-	-	7,500,000
	Canton Street Sidewalk	-	-	-	-	-	-	2,800,000
	Kimball Bridge Sidewalk (Waters to City Limits; TSPLOST 3)	-	-	-	-	-	-	8,000,000
	Milton Ave Sidewalk (TSPLOST 3)	-	-	-	2,745,076	-	2,745,076	-
	Providence Road (Sidewalk Improvements)	-	-	-	-	-	-	1,300,000
	Waters Road (Sidewalk Improvements)	-	-	-	-	-	-	1,200,000
	Wills Drive (Sidewalk Improvements)	-	-	-	-	-	-	190,000
	Wills Road Sidewalk Gap	-	-	-	-	-	-	380,000
	Windward Parkway Sidewalk (TSPLOST 3)	-	4,000,000	-	-	-	4,000,000	-
	Jayne Ellen Curb and Gutter	-	-	-	-	-	-	750,000
	Public Works (Design Services)	40,000	50,000	50,000	50,000	50,000	240,000	-
	Operating Initiative - Infrastructure Crew (new position; +4 FTE): Vehicle Purchase	-	-	-	-	-	-	88,000
	Operating Initiative - Facility Operations Manager (new position; +1 FTE): Vehicle Purchase	-	-	-	-	-	-	71,500
	Operating Initiative - Construction Manager - Infrastructure (new position; +1 FTE): Vehicle Purchase	-	-	-	-	-	-	55,000
		$ 13,226,300	$ 66,486,467	$ 3,797,300	$ 14,971,776	$ 3,236,900	$ 101,718,743	$ 98,490,240
Recreation, Parks & Cultural Services								
	Park Repairs and Improvements	$ 200,000	$ 200,000	$ 150,000	$ 15,000	$ 50,000	$ 615,000	$ -
	Park Security Repairs & Improvements (security cameras, etc.)	60,000	23,000	60,000	23,000	-	166,000	-
	Park Trail Maintenance	25,000	-	-	100,000	-	125,000	-
	Wood Lightpole/LED Replacement Initiative	450,000	-	-	-	-	450,000	-
	Playground Equipment Replacement	50,000	350,000	500,000	75,000	75,000	1,050,000	-
	Park Shade Structure & Awning Replacements	30,000	30,000	30,000	40,000	10,000	140,000	-
	Athletic Court Resurfacing	300,000	75,000	50,000	75,000	-	500,000	-
	Fountain and Pool Repairs	75,000	100,000	50,000	50,000	50,000	325,000	-
(1)	Synthetic Turf Field Replacement	-	-	-	500,000	1,000,000	1,500,000	500,000
	Alpha Loop Maintenance and Repair	50,000	50,000	50,000			150,000	-
(1)	Greenway Improvements/Repairs	-	350,000	250,000	225,000	150,000	975,000	375,000
	Tree Maintenance, Planting and Removal in Parks	125,000	225,000	225,000	225,000	225,000	1,025,000	-
	Recreation (Fleet Replacement)	-	120,000	210,000	180,000	220,000	730,000	-
	General Equipment Replacement (Recreation)	62,500	90,000	57,000	85,000	40,000	334,500	-
	Alpharetta Public Arts (Outdoor On-Loan Sculpture Exhibit)	45,000	45,000	45,000	45,000	45,000	225,000	-
	Public Art in the Parks	20,000	20,000	20,000	20,000	20,000	100,000	-

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		FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	Total	Add'l CIP Requests (Funding TBD; 2027-2031)
Uses (by Department)								
Recreation, Parks & Cultural Services *continued*								
	Public Art Fund by Developers - City Property	10,000	10,000	10,000	10,000	10,000	50,000	-
	Public Art for City Projects	25,000	25,000	25,000	25,000	25,000	125,000	-
	Haynes Bridge Road Park Restroom	500,000	-	-	-	-	500,000	-
	Marconi Drive Park Restroom	500,000	-	-	-	-	500,000	-
	Marietta-Roswell St. Corner Park	250,000	-	-	-	-	250,000	-
	Outdoor Electrical Connections for Roswell Street and Canton Street (Holiday Lighting)	50,000	-	-	-	-	50,000	-
	Alpha Loop Electrical Installation	25,000	-	-	-	-	25,000	-
	Recreation (Design Services)	10,000	25,000	25,000	25,000	25,000	110,000	-
		$ 2,862,500	$ 1,738,000	$ 1,757,000	$ 1,718,000	$ 1,945,000	$ 10,020,500	$ 875,000
Community Development								
	Community Development (Fleet Replacement)	$ -	$ 170,000	$ 85,000	$ 86,000	$ 88,000	$ 429,000	$ -
	North Point District Thresholds (monuments)	-	125,000	-	-	-	125,000	-
(1)	Alpharetta Entry Monuments	-	-	600,000	-	-	600,000	600,000
	North Fulton Comprehensive Transportation Plan (NFCTP) Updates	-	-	-	-	75,000	75,000	-
	Impact Fee Program & Capital Improvement Element (CIE) Updates	-	-	-	-	75,500	75,500	-
	Comprehensive Plan Updates	-	-	-	-	150,000	150,000	-
	Brookside Parkway Road Diet- Phase 1	-	-	-	-	-	-	300,000
	Old Roswell Street Park and Plaza	-	-	-	-	-	-	1,500,000
	Milton Avenue Quick Safety and Operational Improvements	-	-	-	-	-	-	350,000
	Old Milton Parkway at Brookside Parkway (Intersection Upgrades)	-	-	-	-	-	-	300,000
	Brookside Parkway Road Diet and Streetscape (Phase II)	-	-	-	-	-	-	8,600,000
	South Main Street Park Entrances	-	-	-	-	-	-	100,000
	South Main Street Reclaiming of Right of Way Remnants	-	-	-	-	-	-	850,000
	Community Development (Design Services)	-	66,200	67,500	68,900	70,300	272,900	-
		$ -	$ 361,200	$ 752,500	$ 154,900	$ 458,800	$ 1,727,400	$ 12,600,000
General Government								
	Matching Funds for City Grants	$ -	$ -	$ -	$ -	$ -	$ -	$ 600,000
		$ -	$ -	$ -	$ -	$ -	$ -	$ 600,000
	Total Uses	**$ 18,312,849**	**$ 72,427,217**	**$ 12,198,638**	**$ 20,984,780**	**$ 10,564,695**	**$ 134,488,179**	**$ 132,001,240**
	Non-Allocated (Sources-Uses)	**$ 18,207,525**	**$ 2,613**	**$ 42,662**	**$ 62,008**	**$ 233,109**	**$ 18,547,917**	**$ -**
	Total Uses + Non-Allocated	**$ 36,520,374**	**$ 72,429,830**	**$ 12,241,300**	**$ 21,046,788**	**$ 10,797,804**	**$ 153,036,096**	**$ 132,001,240**

(1) Represents capital requests that are not fully funded within the proposed CIP (i.e. included within both the CIP and the Unfunded Project Listing).
(2) Represents capital requests where the anticipated funding years have been adjusted (from Department requests) to reflect forecasted funding availability.

Appendix B (ACVB Budget)

Alpharetta Convention & Visitors Bureau (ACVB)

The ACVB, while a separate legal entity from the city, is funded through a portion of the city's hotel/motel tax (as detailed within the Hotel/Motel Fund budget). As a component of our operational relationship, the city reports on certain economic activities of the ACVB such as the annual adopted budget. This section is provided for informational purposes only.

- **Vision Statement**
  To positively impact the economic life of Alpharetta.
- **ACVB Mission Statement**
  To position the city of Alpharetta as a regionally, nationally and globally recognized premier tourism destination by developing quality programs and facilities to attract overnight visitors.
- **How We Are Funded**
  Alpharetta's 31 hotels collect an 8 percent hotel occupancy tax from their visitors and pay it to the city on a monthly basis. The city keeps 37.5% of the tax to spend on enhancements for its citizens, 18.75% is given to the conference center (facility portion of the tax) and 43.75% is distributed to the ACVB to market and promote the city of Alpharetta.
- **What We Do**

  The ACVB uses innovative and targeted marketing strategies, along with aggressive sales efforts, to attract overnight visitors to the city. We do this in three key areas:

  - Increasing the awareness and identity of Alpharetta as a destination for leisure and individual travelers and raising awareness of the economic importance of the visitor industry to Alpharetta by placing advertisements, writing press releases, utilizing social media, and maintaining a technologically advanced website.
  - Employing a variety of sales strategies to increase the number of group room nights booked in Alpharetta's 31 hotels through attendance at tradeshows, association meetings and conferences as well as sales calls and site visits with event organizers.
  - Providing leadership for the visitor industry, coordinating activities, encouraging marketing activities and partnerships, and projecting an appealing image on behalf of the city of Alpharetta.

Alpharetta Convention & Visitors Bureau (ACVB)
Fiscal Year 2027 Adopted Budget

Occupancy Tax Revenues	$	4,156,250
Interest Income		1,600
Accumulated Surplus		650,000
TOTAL REVENUE	**$**	**4,807,850**
Salary & Benefits	$	1,798,640
Accounting & Legal Fees		28,000
Advertising		
Georgia/Metro Atlanta Ads		243,625
National/Regional Ads		556,000
Business License		500
Computer Equipment		18,200
Business Development		
Ameris Bank Amphitheatre		173,000
Conference Center		500,000
Computer Software/Maintenance		98,150
Research		15,000
Contingency Fund		185,883
Insurance		6,500
Meeting Expenses		48,300
Membership Dues		59,536
Subscriptions		650
Office Equipment/Leases		10,000
Office Rent (utilities, cleaning, security)		120,096
Office Supplies/Furniture		23,000
Postage/Shipping		18,000
Premiums/Gifts		35,000
Printing/Production		157,750
Taxes/Leased Equipment		1,200
Public Relations		205,400
Sponsorships/Bid Fees		328,000
Telephone/ISP		36,000
Tradeshows/Conference/Professional Development		137,820
Staff Development		3,600
TOTAL EXPENSES	**$**	**4,807,850**

Appendix C (Financial Management Policies)

The *Financial Management Policies* section is intended to provide readers with a sampling of the city's financial management policy program. Due to size constraints, several of the city's larger policies have been excluded. First and foremost is the city's procurement policy which guides the purchasing of goods/services of the highest quality at the most reasonable cost through ensuring fair and open competition. Details of the city's procurement policy as well as any of the policies contained within our financial management policy program can be obtained from the city's Finance Department[19].

Section I: General Budget Policies

The budget process provides the primary mechanism by which key decisions are made regarding the levels and types of services to be provided within estimated resources. Budget policy guides this process. Budget policy also directs the city's financial health and stability. Georgia law (e.g., O.C.G.A. 36-81-2 et seq.) provides the budget requirements for Georgia's local governments. The information below provides an outline of the city's application of those laws.

The city's goal is to adopt operating budgets where current revenues equal anticipated expenditures. All departments supported by the resources of this city must function within the limits of the financial resources identified or available specifically to them. A balance must be struck between revenues and expenditures, so the public can realize the benefits of a strong and stable government. It is important to understand that this policy is applied to budget entities over periods of time which extend beyond current appropriations. By law, budgets cannot exceed available resources, defined as revenues generated in the current period added to balances carried forward from prior years.

A. Scope

This policy applies to all budgeted funds, which are the responsibility, and under the management of the City of Alpharetta and its Department of Finance.

B. Financing Current Costs

Current costs shall be financed with current revenues, including the use of authorized fund balances. The city shall avoid balancing current expenditures through the obligation of future year's resources. The city shall strive to avoid short-term borrowing to meet cash flow requirements. However, the city may enter short-term borrowings should a critical need arise.

[19] City of Alpharetta – Finance Department: 2 Park Plaza, Alpharetta, Georgia 30009. Phone (678) 297-6094. Fax (678) 297-6063.

C. Budget Objective by Fund Type

The following budget objectives are established for the different funds the city uses:

- General Fund – The annual budget for the General Fund shall provide for general government operations of the city and maintain working capital necessary for the city's financial health and stability.
- Special Revenue Fund(s) – The city adopts annual budgets for each special revenue fund that demonstrates that any legally restricted revenue sources are used consistent with the applicable laws and/or regulations (e.g., Emergency 911 Fund, Impact Fee Fund, etc.).
- Capital Project Fund(s) – The city adopts project budgets for each of its capital project funds. These adopted appropriations do not lapse at the end of a fiscal year; rather they remain in effect until project completion or re-appropriation by City Council.
- Debt Service Fund(s) – The city adopts annual budgets for its debt service funds. Any remaining fund balances from prior years plus current years projected revenues shall be enough to meet all annual debt service requirements.
- Proprietary Fund(s) - Although generally accepted accounting principles (GAAP) or Georgia statutes do not require the city to adopt budgets for enterprise funds, the city does adopt budgets for its enterprise funds to monitor revenues and control expenses. The city uses a business approach when budgeting enterprise funds. Enterprise funds shall be self-supporting whenever possible and subsidized losses will be minimized when break-even is not possible. Also, the city adopts annual budgets for its Internal Service Funds.

Additionally, the city classifies funds as either operating funds or non-operating funds. Operating funds are those funds that include appropriations for the payment of salary/benefits and whose maintenance & operating appropriations are necessary to continue the daily operations of the city. The General Fund will always be an operating fund. Other examples of operating funds are the Emergency 911 Fund and the Solid Waste Fund. Non-operating funds are those funds that do not include appropriations for the payment of salary/benefits and whose maintenance & operating appropriations are not critical to the daily operations of the city. Examples of non-operating funds are the Hotel/Motel Fund, Impact Fee Fund, and the Drug Enforcement Agency Fund.

Section II: Operating Budget Policies

The operating budget shall be prepared on an annual basis and include those funds detailed in Section I that are subject to annual appropriation (all funds excluding the Capital Project Funds and the Fiduciary Fund). Prior year budget appropriations and prior year actual expenditures will be provided as reference data, with the current year's appropriation and two years projection of expenditures. At a minimum, the city shall adopt annual balanced budgets for the general fund, each special revenue fund, and each debt service fund in accordance with O.C.G.A. 36-81-3.

The annual proposed budget should be submitted to the governing authority while being held by the Department of Finance for public review/inspection in accordance with O.C.G.A. 36-81-3. Public meetings will be conducted after proper advertisement prior to the City Council adopting and approving the annual budget document. (O.C.G.A. 36-81-5 and 36-81-6).

A. Departmental Appropriations

The budget shall be developed based upon "line-item" expenditures within each department. This type of budget focuses on categories of expenditure such as personal services, contractual services, supplies, equipment, etc. within each department. At a minimum, each department's appropriation in each fund shall be detailed within the budget document. (O.C.G.A. 36-81-3 and 36-81-5).

B. Performance Budget

In addition to requesting expenditures by line item, the budget document shall include "performance" budget information. A performance budget provides information on each of the departments' goals and objectives to be accomplished in the upcoming budget year. Goals and objectives should be SMART – Specific, Measurable, Achievable, Relevant, and Timed. Ultimately, the goals and objectives should result in efficiency/effectiveness improvements.

A performance budget also utilizes "Service Efforts and Accomplishments" which measure services rendered and department efficiency/effectiveness on a historical basis and project targets of the indicators for the upcoming budget year. The city shall strive to minimize and reduce, if possible, staffing levels required to accomplish its service delivery.

C. Budget Preparation Categories

Each department shall submit budget requests separately for:

- Current services - A current services budget is defined as that level of funding which is necessary to provide the same level of service for the upcoming year

that is currently being provided. The current services budget will include replacement capital equipment; and

- Expanded services - An expanded services budget includes funding requests associated with new services, additional personnel or new capital projects/equipment.

D. Balanced Budget

The budget shall be balanced for each budgeted fund. Total anticipated revenues plus that portion of fund balance in excess of authorized reserves (see operating budget policy H below) designated as a budget-funding source shall equal total estimated expenditures for each fund.

E. Basis of Budgeting

Neither GAAP nor Georgia statutes address a required budgetary basis of budgeting; the city adopts budgets in conformity with GAAP for all budgeted funds. All governmental funds use the modified accrual basis of accounting and proprietary fund budgets use the accrual basis of accounting.

F. Level of Budget Adoption and Control

All budgets shall be adopted at the legal level of budgetary control, which is the department level within each individual fund. See policy K below for amending the budget.

G. Budget Stabilization Resources

The city shall establish a fund balance reserve in all operating funds (defined in Section I of this policy) for working capital. The purpose of working capital is to cover the cost of expenditures caused by unforeseen emergencies, cover shortfalls caused by revenue declines, and to eliminate any short-term borrowing for cash flow purposes. This reserve shall accumulate and then be maintained at an amount, which represents no less than two (2) months of operating and debt expenditures[20].

H. Utilization of Prior Year's Fund Balance

If necessary, the city may use fund balance in excess of the reserve for working capital (see operating budget policy G above) as a funding source for that fund's budget. The amount of unreserved fund balance shall be estimated conservatively, taking into consideration future year needs. The minimum requirement for the reserve for

[20] This equates to approximately 16%. In keeping with the strong financial management practices that allowed Alpharetta to become one of the few cities in the country with a AAA credit rating (highest available), the city currently maintains a Fund Balance Designation of 25%.

working capital, equal to two (2) months of operating and debt expenditures, must first be met before utilizing the excess fund balance as a funding source for the budget.

I. Appropriation Lapses at Year End

All operating budget appropriations (including encumbered appropriations) shall lapse at the end of the fiscal year. Purchases encumbered in the current year, but not received until the following year, must be charged against a department's subsequent year's appropriation.

J. Budget Control Reports

The city shall maintain a system of budgetary control reports to assure adherence to the budget. The city will prepare and distribute to departments, timely monthly financial reports comparing actual revenues, and outstanding encumbrances and expenditures with budgeted amounts.

K. Authorization of Budget Adjustments and Amendments

The budget is a dynamic rather than static plan, which requires adjustments and formal budget amendments as circumstances change. The City Council must approve all increases in total departmental appropriations, increases in the personal services budgets (i.e., moving salary or employee benefit budget to other line items), and increases in the number of authorized positions (full and part-time).

Department heads must submit budget amendment requests transferring appropriations from one line-item to another, other than those prohibited above, and obtain approval by the Director of Finance and the City Administrator. Adjustments from appropriations that have been obligated, committed, or reserved for a designated purpose shall not be transferred until a formal de-obligation occurs.

At the mid-point of each year, any necessary budgetary appropriations, including budgets for any projects authorized but not funded during the year, shall be appropriated through a supplementary budget ordinance. This mid-point adjustment is limited to requesting additional resources. Such supplemental appropriations shall be balanced with additional revenues for each fund. A justification for each requested change must be prepared (O.C.G.A. 38-81-3).

L. Contingency

The city shall establish an appropriated contingency of one percent of the total annual expenditure appropriation in all operating funds (defined in Section I of this policy) in order to accommodate unexpected operational changes, legislative impacts, or other economic events affecting the city's operations which could not have been reasonably anticipated at the time the budget was prepared. Non-operating funds

(defined in Section I of this policy) shall not require a contingency reserve appropriation.

This contingency reserve appropriation will be a separate line item within the budget. This amount shall be subject to annual appropriation. The approval of the Mayor and the City Administrator is required before this appropriation can be expended. If approved, the Finance Department will transfer the appropriation from the contingency line item to the applicable line item(s) with the applicable department's budget.

M. Maintenance and Replacement of Capital Equipment

The City Council will give budget priority to requests that provide adequate maintenance of capital equipment and facilities and for their orderly replacement.

N. Contributions

Unless authorized by City Council, outside contributions to programs operated by city departments shall be subject to the city's accounting and budgetary policies. The city welcomes both unrestricted and restricted contributions compatible with the city's programs and objectives. The Finance Director is authorized via the annual budget ordinance to amend the budget to reflect donation and/or contribution revenues and expenditures upon documented approval by the director of the benefiting department and the actual receipt of the donation and/or contribution.

O. Administrative Service Fee/Cost Allocation

Whenever possible, the city may assess an administrative service fee from the General Fund to any other fund, based upon documentation and/or an outside independent study. This assessment will be based upon a percentage of the operating revenues, or services provided to the fund and shall be used to reimburse the General Fund for the administrative and support services provided to the assessed fund.

Section III: Cash-flow Budget Policies

For analysis and internal management purposes, the city shall prepare an annual cash flow budget in conjunction with the Operating Budget. The purpose of this document will be to provide the necessary guidelines to ensure that cash will be available to pay budget costs on a timely basis.

A. Budget Allotments

Budget allocations (i.e., budget allotments) are used in the operating budget, when needed to manage cash flows. The annual appropriation may be divided into segments in order to ensure that the projected revenue streams will be adequate to fund the appropriated expenditures. The cash flow budget will provide details as to

the periods in which the revenues will be collected and thereby provide for available resources to pay obligations.

Section IV: Capital Project Improvement Plan Policies

The city will prepare a ten-year capital project improvement plan (CIP) which they will update annually. This plan will assist in the planning, acquisition, and financing of capital projects. A major capital project generally is defined as an expenditure that has an expected useful life of more than three years with an estimated total cost of $25,000 or more, or an improvement/addition to an existing capital asset. Examples include building/infrastructure construction, park improvements, streetscapes, land acquisitions, and vehicles.

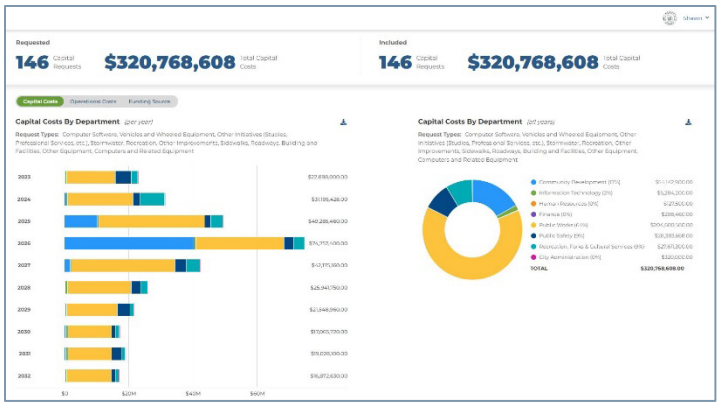
Major capital projects will be budgeted in the Capital Improvement Fund along with all identified funding resources. With the involvement of the responsible departments, the Finance Department will prepare the capital budget in conjunction with the operating budget.

A. Project Length Budget

The CIP budget shall be developed based upon defined projects approved by the Mayor and City Council. Budget appropriation shall include the complete project costs with contingency amounts as appropriate and if available. (O.C.G.A. 36-81-3)

B. Budget Preparation

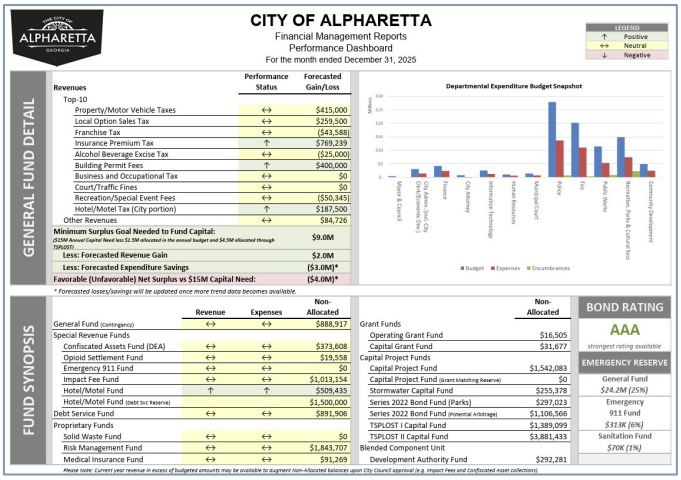
Each department, in conjunction with the Mayor and City Council, will identify potential capital projects throughout the year. All identified projects will be added to the CIP document, regardless of available funding. These needed projects will provide a method of tracking and planning for future needs of the city. Every effort will be made to identify those projects committed by the City Council through legislative action.



The graphic to the right depicts the dashboard for our CIP tracking software that is updated annually by departments during the budget process and serves as the foundation of the city's 10-Year CIP.

C. Budget Control Reports

The city shall maintain a system of budgetary control reports to assure adherence to the budget. The city will prepare and distribute to departments, timely monthly financial reports comparing actual revenues, and outstanding encumbrances and expenditures with budgeted amounts.



The graphic above depicts the city's monthly Performance Dashboard which provides trend information on revenues, expenditures, and contingency balances.

D. Authorization of Budget Adjustments and Amendments

Department heads must submit budget amendment requests, transferring appropriations from one line-item to another within the same project. The Director of Finance and the City Administrator shall review and approve all requests for budget adjustments. Adjustments from appropriations that have been obligated, committed, or reserved for a designated purpose shall not be transferred until a formal de-obligation occurs. The de-obligation of budget dollars to a specific project will only occur after the completion of the project or when a project was identified, and budget and funding is no longer necessary.

E. Appropriations at Year End

Capital project appropriations shall carry forward to the subsequent budget period an equal amount of any encumbrances/purchase orders issued as of the close of the fiscal year. Purchases encumbered in the current year, but not received until the following year, must be charged against each department's subsequent year carry-over appropriation. Any remaining appropriation available by project at year-end must be re-appropriated.

F. Contingency

The city shall include an appropriated contingency of three percent of the total annual expenditure appropriation in the Capital Project Fund in order to accommodate expenditures that may not have been expected during the duration of a capital project. Expenditure of contingency funds shall only be authorized in accordance with the city's Change Order Policy. Any contingency budgets shall be subject to annual appropriation.

Section V: Revenue Administration Policies

The city levies, collects, and records certain taxes, license and permit fees, intergovernmental revenues, charges for service, investment income, fines and forfeitures, and other miscellaneous revenues and financing sources. This policy provides direction in the application, acceptance, and administration of revenues the city receives.

A. Diversification and Stability

All revenues have specific characteristics in terms of stability, growth, sensitivity to inflation or business cycle effects, and impact on the tax and ratepayers. A diversity of revenue sources can improve a city's ability to handle fluctuations in revenues and potentially help to better distribute the cost of providing services.

The city shall strive to maintain a diversified and stable revenue structure to shelter it from short-term fluctuations in any primary revenue source. When possible, the revenue mix shall combine elastic and inelastic revenue sources to minimize the effect of economic downturns. The city will work towards diversifying its revenue base to reduce its dependence upon property taxes.

B. Conservative Revenue Estimates

As part of the annual budget process, an objective analytical process will estimate revenues realistically and prudently. The city will estimate revenues of a volatile nature conservatively.

C. User Based Fees and Charges (Exchange Revenue)

The level of user fee cost recovery should consider the *community-wide* versus *special service* nature of the program or activity. The use of general-purpose revenues is appropriate for community-wide services, while user fees are appropriate for services that are of special benefit to easily identified individuals or groups.

The city will strive to keep the revenue system simple that will result in a decrease in compliance costs for the taxpayer or service recipient and a corresponding decrease in avoidance to pay. The city will avoid nuisance taxes, fees, or charges as revenue sources.

The city's revenue system will strive to maintain equity in its structure. That is, the city will seek to minimize or eliminate all forms for subsidization between entities, funds, services, utilities, and customers. However, it is recognized that public policy decisions may lead to subsidies in certain circumstances (e.g., senior citizen partial tax abatement).

Fees will be reviewed and updated on an ongoing basis to ensure that they keep pace with changes in the cost-of-living as well as changes in methods or levels of service

delivery. The Finance Department shall forward any proposed changes to the City Council for approval.

For services associated with a user fee or charge, a fee shall offset the costs of that service, where possible. Costs of services include direct and indirect costs such as operating and maintenance costs, administrative costs, and charges for the use of capital (e.g., depreciation and/or debt service).

D. Alternative Revenue Sources

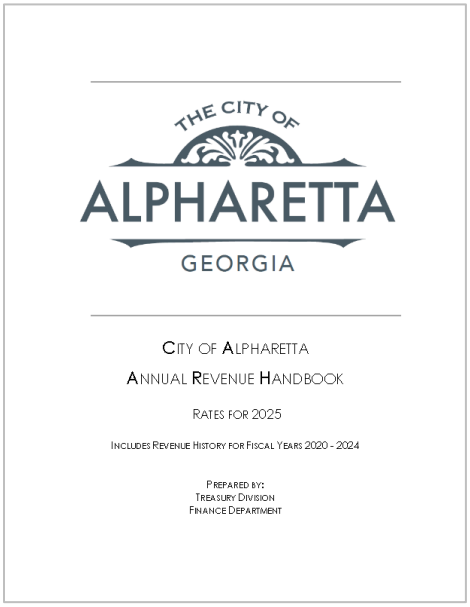
The city shall seek alternative funding sources whenever possible to reduce the required revenue from non-exchange transactions (e.g., property taxes). Such alternative sources include private and public grants, federal or state assistance, and public and private contributions.

E. Revenue Collection

The city will follow an aggressive policy of collecting revenues, consistent with state and federal laws. This policy includes charging penalties and interest, revoking city licenses, and providing for the transferring and assignment of tax executions.

F. Rates and Charges

The City Council shall approve all revenue rates, charges, and processes in association with receipted funds that are deposited by the city, in accordance with the Code of Ordinances.



G. Revenue Handbook

The revenue handbook is updated annually as part of the budget process. This information contained therein is utilized to adjust fees and user charges. The handbook includes (at a minimum) the following information:

- Revenue Source
- Legal Authorization
- Method of Collection
- Department responsible for collection
- Rate or charge history
- Total revenue history

Section VI: Capital Asset Policies

A. Introduction

The Capital Asset Policy is designed to provide a comprehensive description of the capital asset and property systems of the City of Alpharetta. The primary purpose of the policies is to provide for consistent and uniform accounting of capital asset transactions throughout the city; guidelines for physical control and accountability of capital assets; and guidelines for disposal and depreciation of capital assets.

B. Definitions

- Asset Acquisition: There are various methods by which the city acquires assets. These methods include, but are not limited to purchase, donation, lease/purchase, trade-in, forfeiture, condemnation, internal/external construction, transfers from other governments, or any other method which transfers title of any property to the city.
  - *Leased Assets:* The city capitalizes assets, acquired under capital lease, provided they meet the capitalization threshold, and a buy-out option is included in the lease agreement. The capital lease must meet accounting standards for capitalization purposes. For capital leases, where the title of the asset will ultimately be transferred to the city, the asset will be capitalized at the net present value of future minimum lease payments. The city does not capitalize assets they acquired under operating leases.
  - *Gifts/Donations:* The city capitalizes all equipment acquired through donations at fair market value on the date of the transaction, provided such gift or donation meets the capitalization threshold of this policy. If the equipment is new and the donor can furnish an invoice, the invoice would determine the fair market value. If the equipment is used or no information is available regarding the cost of new equipment on date of acquisition, an appraisal will be conducted to establish the capitalization amount.
- Property: Property is divided into several classes including:
  - *Real property:* Land and whatever is attached to the land that cannot be readily removed, such as buildings and permanent improvements to the land. Infrastructure is included within this classification.
  - *Personal property:* Property that is movable and further classified as tangible and intangible.

- *Tangible personal property:* Property that is moveable such as furniture, machinery, automobiles, or works of art.
- *Intangible personal property:* The right of ownership in property such as bonds, notes, contracts, computer software, programs, and proprietary assets that are created or purchased and owned by the city.

- Capital Asset: Any real or personal property acquired by the city which has an estimated useful life of three (3) or more years with an acquisition value of $5,000 or more. This includes land, improvements to land, easements, buildings, building improvements, vehicles, machinery, equipment, works of art and historical treasures, infrastructure, and all other tangible or intangible assets that are used in the operations of the government.
- Asset Capitalization Amount: The city will capitalize purchased assets at acquisition cost plus costs incurred in preparing the asset for use. The city will recognize acquisition costs based on individual unit prices.
- Generally Accepted Accounting Principles (GAAP) Reporting: All assets capitalized under this policy shall be included in the financial statements issued by the city and in the annual external audit.
- Gifts/Donations: Gifts and donations are capitalized at fair market value on the date donated, if the value of the asset meets the threshold levels.

B. Classification Categories

- Land: The city will capitalize all costs incurred to acquire land (without regard to a dollar threshold) and to place it in use. The acquisition costs of land should include: (1) the purchase price; (2) ancillary charges; (3) the assumption of any liens or mortgages on the property; and (4) improvements made to the land that are permanent in nature. Examples of ancillary charges to be included in the capitalization costs are legal and title fees, closing costs, appraisal and negotiation fees, surveying fees, site preparation fees, demolition costs, architect and accounting fees, insurance premiums during construction phase, and transportation charges.
- Land Improvements: The city classifies improvements to land with limited lives, such as fences, parking lots, and walkways as land improvements.
- Buildings: If the city purchases a building, the capitalized cost should include the purchase price and other incidental expenses incurred at the time of acquisition. If the building is constructed, the capitalized cost should include material, labor, supervision, and overhead, or the contract price, including

costs such as permits and licenses, architectural and engineering fess, insurance, title costs, and interest incurred on tax exempt debt (the latter is applicable to enterprise funds only).

- Building Improvements: The city capitalizes costs of improvements to a building if the following criteria are met: (1) the expenditure increases the service potential of the building and (2) the total improvement costs, including the contract price, engineering, architectural, and attorney's fees, etc., meet the capitalization threshold of this policy.

  Items considered as improvements include ramps, fire escapes, truck doors or other appurtenances; modifications to comply with fire, health, or safety codes; conversion of unusable to useable floor space, upgrade of the space.

  Repairs to a building are not considered an improvement unless it extends the useful life of the structure or increases the value of the structure (i.e., a betterment). The city considers ordinary repairs as operating costs.

- Construction in Progress: Construction in progress includes accumulation of on-going project costs that increase the value or life of the asset. Upon completion, the construction account in progress will be closed out and costs will be capitalized into the appropriate asset category (infrastructure, land improvement, building).

- Moveable Equipment: Expenditures for individual items or pieces of equipment meeting the capitalization threshold shall be capitalized, consistent with the designations of personal property, both tangible and intangible outlined above.

- Infrastructure: Long-lived capital assets that normally are stationary in nature and normally can be preserved for a significantly greater number of years than most capital assets shall be capitalized based on the capitalization threshold requirement of this policy. Examples of infrastructure include roads, bridges, drainage systems, sidewalks, etc.

C. Annual Inventory

Annually, an asset listing is sent to each department for their verification of the existence of their department's capital assets. The department should identify any assets they have which are not included in the asset listing. Also, the department should identify any missing assets. The Finance Department will investigate any missing items with the assistance of the department. Significant unaccounted losses of assets will be brought to the attention of the Finance Director and/or the City Administrator for further actions. The Finance Department, with the cooperation of

the department, may make an annual physical inventory to verify the accuracy of inventory records.

D. Transfer or Disposal of Assets

All capital assets are the property of the city. They may not be donated, discarded or transferred to another owner without the Finance Department's direct authorization. Departments should send all surplus assets to the Finance Department for disposition. Transfer or disposal of vehicles must be coordinated with Fleet Services.

The disposition of capital assets the city purchased with Federal grant must follow Federal Guidelines. The guidelines of the specific grant, or Federal general guidelines, will dictate the duration of time that the asset must remain property of the city. The guidelines also will indicate the disposition of the proceeds from the sale of the assets.

All sales by the city of real property or personal property with an assigned value of more than $500 must be offered for purchase, either by sealed bids or by auction to the highest bidder. Notice about the sale must be published once in the official newspaper of the city or in a newspaper of general circulation in the city. The legal notice must appear not less than 15 days or more than 60 days prior to the date of the sale. The notice must contain a brief description of the property and the conditions of the sale. If the sale is by sealed bid, the bids shall be opened in public at the time and place stated in the legal notice. The bids shall be kept available for public inspection for 60 days. The city may reject any and all bids or cancel the proposed sale. Property with an estimated value of less than $500 may be sold without regard to the above provisions. Such sales may be made in the open market without advertising and without acceptance of bids. The city has the power to estimate the value of the property being sold.

E. Depreciation

The city records depreciation for its capital assets monthly. Depreciation is calculated using the straight-line method with no estimated salvage values. For purchased capital assets, the city uses the invoice date as the in-service date.

F. Estimated Useful Life

For purposes of depreciation, each asset is assigned an estimated useful life. Useful lives are based upon the category of assets. The life of the asset begins when it is put into service, which is recognized as the invoice date. The estimated lives shall be based upon those recommended by the Governmental Accounting Standards Board, the Government Finance Officers Association, and the city's experience.

G. Asset and Inventory Control Responsibility

It is the responsibility of the Finance Department to establish and maintain an accurate accounting of capital assets, and to design and implement operating procedures for activities required as a result of this policy. It shall be the responsibility of all city departments to cooperate in the capitalization process and to perform the annual inventory.

Section VII: Non-Capital Operating Inventory Policies

The primary purpose of the Non-Capital Inventory Policy is to provide:

- Consistent and uniform tracking of assets which are not capitalized under the Capital Asset policy.
- Guidelines for physical control and accountability of items which should be inventoried and tracked based upon purpose.
- Guidelines for disposal and yearly reporting of inventoried, non-capital assets.

A. Acquisition

Operating Inventory Acquisition: There are various methods by which the city acquires operating inventories. The acquisition means may require different methods to identify inventories. The city acquires inventories in the following ways:

- New Purchases
- Donations
- Transfer from Other Departments
- City Surplus
- Lease Purchase
- Internal/External Construction

B. Inventory

Operating Inventory Criteria: The city will track inventories when one of the following criteria is met:

- Goods or supplies are purchased with use scheduled for a future date. Examples of this type of inventory include water meters purchased for future installation or bulk paper purchased with the intent of distribution to departments when previous stock has been depleted; or
- The operating inventory is such that for non-financial related reasons, the tracking of the item(s) is beneficial to the safekeeping of governmental

property. Examples of this type of inventory include firearms or official uniforms. Further, specialized tools and equipment may be determined applicable to this policy.

C. Classification Categories

All inventories shall be classified and reported in compliance with Generally Accepted Accounting Principles (GAAP). Classifications and categories shall be compliant with the Georgia Department of Community Affairs chart of accounts.

D. Annual Inventory

Annually, an inventory listing shall be sent from all departments to the Department of Finance for verification of the existence of their department's non-capitalized assets. The department should identify any inventories that their department has that are not included on the capitalized asset listing. Also, the department should identify any missing items from inventory. The Department of Finance will investigate any missing items with the assistance of the department. Significant unaccounted losses of assets will be brought to the attention of the Finance Director and/or the City Administrator for further actions. The Department of Finance, with the cooperation of the department, may make an annual physical inventory to verify the accuracy of inventory records.

E. Transfer or Disposal of Assets

All inventory assets are the property of the city. They may not be donated, discarded, transferred, or consumed to/by another department without the Finance Department's notification. Departments should notify Finance for assistance in the disposal of all surplus inventories. Disposal of inventories to surplus is accomplished by completing the "*Inventory/Transfer*" form and indicating that the asset is being transferred to surplus.

All sales by the city of real property or personal property with an assigned value of more than $500 must be offered for purchase, either by sealed bids or by auction, to the highest bidder. Notice about the sale must be published once in the official newspaper of the city or in a newspaper of general circulation in the city. The legal notice must appear not less than 15 days or more than 60 days prior to the date of the sale. The notice must contain a description of the property and the conditions of the sale. If the sale is by sealed bid, the bids shall be opened in public at the time and place stated in the legal notice. The bids shall be kept available for public inspection for 60 days. The city may reject any and all bids or cancel the proposed sale.

Property with an estimated value of less than $500 may be sold without regard to the above provisions. Such sales may be made in the open market without advertising

and without acceptance of bids. The city has the power to estimate the value of the property being sold.

Section VIII: Accounting, Auditing and Financial Reporting Policies

Section I: Accounting

The city shall maintain a system of financial monitoring, control, and reporting for all operations and funds in order to provide an effective means of ensuring that financial integrity is not compromised. In addition, such practices shall provide city officials with the necessary resources in order to make sound financial decisions.

A. Scope

This policy applies to all accounting records that are the responsibility and under the management of the city's Department of Finance

B. Generally Accepted Accounting Principles (GAAP)

The city will establish and maintain a high standard of accounting practices. Accounting standards will conform to generally accepted accounting principles of the United States as promulgated by the Governmental Accounting Standards Board (GASB). The city will also follow the Financial Accounting Standards Board's pronouncements, as applicable.

C. Fund Structure

The city will maintain the minimum number of funds consistent with legal compliance and sound financial administration. The city will adhere to the mandatory fund structure included in the Georgia Department of Community Affairs' (DCA) chart of accounts (see below). Funds shall be classified in conformity with GAAP. Further, all funds shall be reported within the annual financial statements.

D. Chart of Accounts

The Georgia General Assembly passed the Local Government Uniform Chart of Accounts and Reporting act in 1997 (House Bill 491). This law requires the DCA to prepare and issue a standardized chart of accounts for Georgia governments. It shall be the policy of the city to implement and utilize the account classifications as the chart of accounts prescribes.

Section II: Auditing

Georgia Law on Local Government Audits, O.C.G.A. Section 36-81-7, requires an independent annual audit for the city. The annual independent audit shall be conducted in accordance with generally accepted auditing standards (GAAS) and generally accepted governmental auditing standards (GAGAS). In addition, the city shall comply with the requirements of the General Accounting Office (GAO) and the Office of Management and Budget (OMB) when audits are conducted relating to federal funding consistent with the 1996 (and any future) amendments to the Single Audit Act.

A. Scope

This policy applies to all funds that are the responsibility and under the management of the City of Alpharetta and its Department of Finance.

B. Auditor Qualifications

A properly licensed Georgia independent public accounting firm shall conduct the audit.

C. Choosing the Audit Firm

Every three to five years, the city will issue a request for proposal to choose an audit firm for a period of three years with two one-year options. The city will request two proposals from qualified public accounting firms. One proposal shall contain the firm's costs, and a second will contain the firm's qualifications. The cost proposals shall only be opened after three qualified firms are determined. When awarding the contract for the independent audit, not less than 70% of the decision will be based upon technical qualifications rather than cost.

D. Auditing Agreement

The agreement between the independent auditor and the city shall be in the form of a written contract or an engagement letter. The contract or engagement letter shall include the request for proposal as an appendix to the written document and all issues addressed in the request for proposal shall be required as part of the contract or engagement letter.

E. Internal Audit

The city shall develop and maintain a strong internal audit function whereby applying financial practices and policies to transactions. The city shall develop accounting practices and procedures which will be documented for use in internal control evaluation.

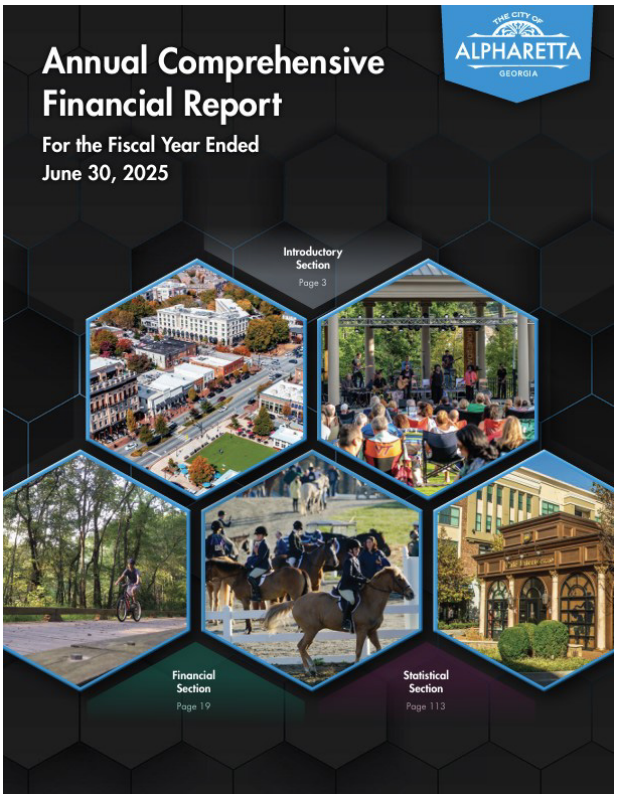
F. Malfeasance and Embezzlement

Any employee will be prosecuted to the extent of the law in any instance where the employee is proven to have committed an illegal act such as theft.

Section III: Financial Reporting Policies

The Department of Finance shall develop and maintain an ongoing system of financial reporting to meet the information needs of the government, authorities, and regulatory agencies. In addition, the City Administrator, Mayor, Council, Department Heads, and the public shall have access to reports to allow them to monitor, regulate, and use as a basis for future financial decisions.

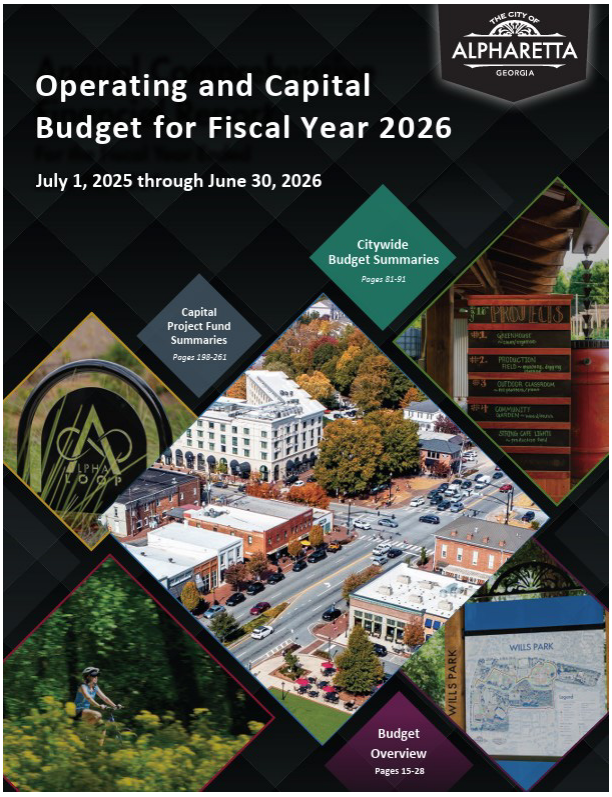
A. Annual Comprehensive Financial Report (ACFR)[21]



In conjunction with the annual independent audit, the city shall prepare and publish an Annual Comprehensive Financial Report (ACFR). The city shall prepare the ACFR in conformity with GAAP and the Government Finance Officers Association's (GFOA) program requirements.

The city will submit its annual ACFR to the GFOA to determine its eligibility to receive the GFOA's "*Certificate of Achievement for Excellence in Financial Reporting*." The city shall make this report available to the elected officials, bond rating agencies, creditors, and citizens. All financial statements and schedules contained within the ACFR shall be audited with the purpose of effectively communicating the complete financial affairs of the city to all interested readers.

[21] Available for download from the City's website: https://www.alpharetta.ga.us/346/Audited-Financial-Statements.



B. Annual Budget Document[22]

The city shall prepare and publish an annual budget document. This budget shall measure the annual funding and forecast the financial position of the city for the two subsequent fiscal years.

C. Annual Citizens Report[23]

To provide citizens with financial information that is easily disseminated, the Finance Department shall coordinate the publication of an annual report to the citizens (e.g., a popular report).

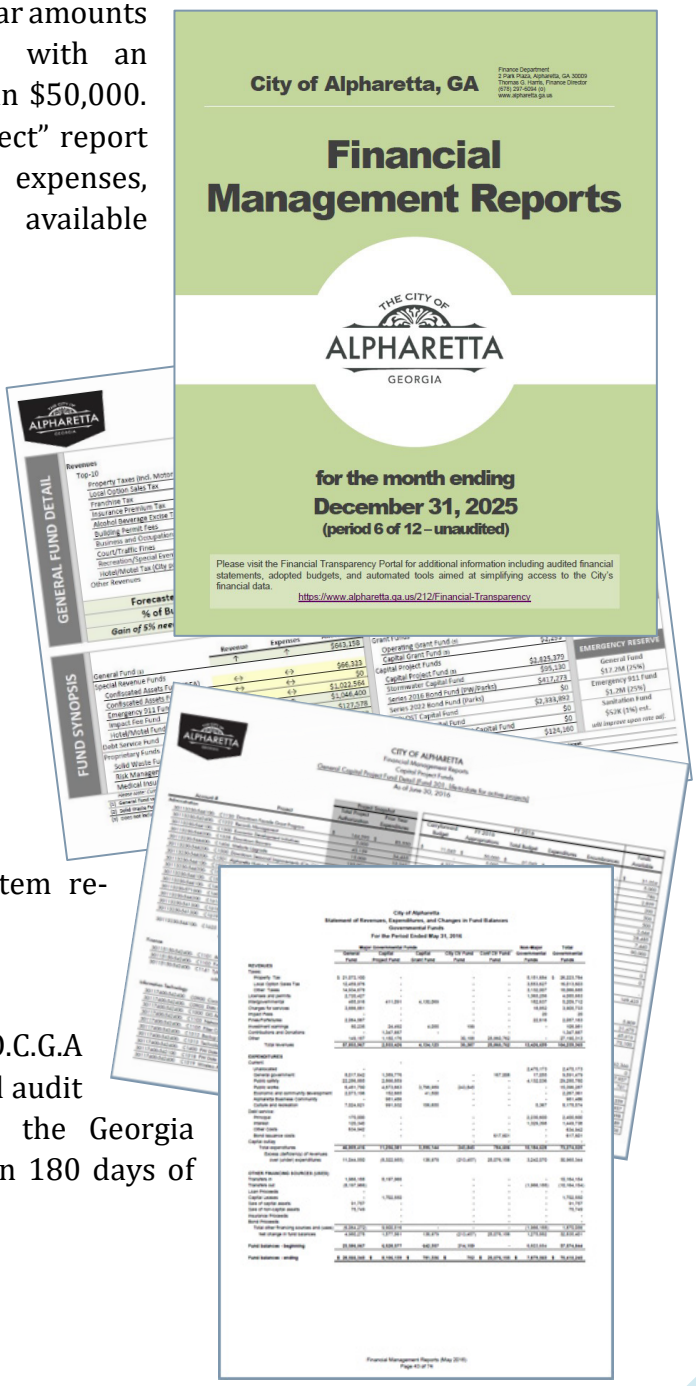
This report is in addition to the ACFR and shall be in conformance with GAAP and follow the recommendations of the GFOA's "Popular Annual Financial Report" (PAFR) program guidelines. The city shall submit the Annual Citizen's Report to the PAFR program to determine if it is eligible to receive the award.



[22] Available for download from the City's website: https://www.alpharetta.ga.us/343/Annual-Operating-Capital-Budget.
[23] Available for download from the City's website: https://www.alpharetta.ga.us/341/Annual-Citizens-Reports.

D. Financial Reporting to the City Council[24]

On a monthly basis, the Finance Department shall prepare and present a summarized "*Statement of Revenues and Expenditures*" to the City Council for all city operating funds. This report shall detail prior year's comparisons to provide data for analysis. In addition, this report shall include all checks issued in dollar amounts over $5,000, and all purchase orders with an estimated cost of over $5,000 but less than $50,000. The city also shall prepare a "Capital Project" report outlining appropriations (if any), expenses, outstanding encumbrances, and available appropriable balances.



E. Financial Reporting to City Administration

In addition to the external reporting detailed above, the Finance Department shall coordinate the reporting needs of each department to design and implement those reports which the departments need to make sound business decisions. At a minimum, departments will receive reports detailing monthly department financial activity including expenses, any personnel costs in excess of the approved budget, and recommended budget line-item re-allocations.

F. External Financial Reporting

The city shall report in conformity with O.C.G.A Section 36-81-7. A copy of the city's annual audit (i.e., the ACFR) shall be submitted to the Georgia Department of Audits and Accounts within 180 days of year-end as required.

[24] Available for download from the City's website: https://www.alpharetta.ga.us/347/Financial-Management-Reports.

Section IX: Debt Management Reporting

The goal of the city's debt policy is to maintain a sound fiscal position; thereby only utilizing long-term debt to provide resources to finance needed capital improvements, while accumulating adequate resources to repay the debt. In addition, it is the city's goal to maintain and improve its credit rating through strong financial administration. The city acknowledges that failure to meet the demands of growth may inhibit its continued economic viability but also realizes that excess outstanding debt may have detrimental effects on the ability of the city to meet its continuing operational needs. Issuing debt commits the city's revenues several years into the future and may limit its flexibility to respond to changing service priorities, revenue inflows, or cost structures. Adherence to this debt policy helps ensure that the city issues and manages its debt prudently in order to maintain a sound financial position and protect its credit rating. Credit ratings are the rating agencies' assessment of the city's ability and willingness to repay debt on a timely basis. Credit ratings are an important indicator in the credit markets and can influence interest rates a borrower must pay. Implementing debt management practices will be viewed positively by the rating agencies and could influence the city's credit rating and ultimately lower borrowing costs.

A. Conditions for Issuing Long-term Debt

Debt financing for capital improvements and equipment will be generally used when at least one of the following conditions exists:

- When one-time, non-continuous projects (those not requiring annual appropriations) are desired.
- When the city determines that future users will receive a benefit from the capital improvement that the debt financed.
- When the project is necessary to provide basic services to the city residents.
- When total debt, including debt issued by overlapping governments (e.g., the county), does not constitute an unreasonable burden to the taxpayers.
- Exhaustion of the use of all other possible revenue sources provides no alternative funding for capital projects.

B. Sound Financing of Debt

When the city utilizes debt financing, the following will occur to ensure that the debt is soundly financed:

- Analysis of the financial impact, both short-term and long-term, of issuing the debt.
- Conservatively projecting the revenue sources that the city will use to repay the debt.
- Ensuring that the term of any long-term debt the city incurs shall not exceed the expected useful life of the asset the debt financed.
- Maintaining a debt service coverage ratio (i.e., for revenue secured debt) that ensures that the revenues pledged for the repayment of the outstanding debt will be adequate to make the required debt service payments.

C. Debt Retirement

Generally, borrowings by the city should be of a duration that does not exceed the economic life of the capital improvement that it finances and, where feasible, should be shorter than the projected economic life. To the extent possible, the city should design the repayment of debt to recapture rapidly its credit capacity for future use.

D. Disclosure

The city shall follow a policy of full disclosure in financial reporting and in the preparation of a bond prospectus.

E. Legal Compliance

When issuing debt, the city shall comply with all legal and regulatory requirements, including the continuing disclosure requirements. This compliance includes adherence to local, state, and federal legislation as well as bond covenants. More specifically, the Director of Finance is responsible for maintaining a system of record keeping and reporting to meet the arbitrage rebate compliance requirements of the federal tax code. This effort includes tracking investment earnings on bond proceeds, calculating rebate payments in compliance with tax law, and remitting any rebatable earnings to the federal government in a timely manner in order to preserve the tax-exempt status of the city's outstanding debt issues. Additionally, general financial reporting and certification requirements embodied in bond covenants are monitored to ensure compliance that all covenants. The city will comply with Amended SEC Rule 15c2-12 (the "Rule") by providing secondary market disclosure for all long-term debt obligations which are subject to the Rule. As required, the city will submit annual financial information to all nationally recognized municipal securities repositories.

F. Credit Ratings

The Director of Finance is responsible for maintaining relationships with the rating agencies that assign ratings to the city's various debt obligations. This effort includes providing periodic updates on the city's general financial condition along with coordinating meetings and presentations in conjunction with a new debt issuance.

G. Other Policies

All bond issue requests shall be coordinated by the Department of Finance. Requests for new bonds must be identified during the Capital Improvement Program (CIP) process. Opportunities for refunding outstanding bonds shall be communicated by the Department of Finance. Annual budget appropriations shall include debt payments (interest and principal) and reserve requirements for all debt outstanding. Long-term borrowing shall be incorporated into the city's capital improvement plan.

Section X: Grant Management Policies

This policy provides direction in the application, acceptance and administration of funds awarded through grants to the city from other local governments, the state or federal government, non-profit agencies, philanthropic organizations, and the private sector.

A. Grant Applications

The city's Grants Administrator is responsible for the submission of all grant applications on behalf of the City of Alpharetta. Departments who wish to submit grant applications must work in conjunction with the Grants Administrator. Once a grant opportunity has been identified, the Grants Administrator documents the application, the financial reporting requirements, and any required matching funds or other city resources needed to meet the grant requirements. Prior to the acceptance of the grant, the Finance Department, in cooperation with the submitting/receiving department shall complete an analysis of financial requirements to ensure the city can meet the grant program's financial requirements and the city can fulfill the applicable obligations required by the grant. All grant revenues and expenditures, including matching requirements, must be appropriated, either in the current budget or included for appropriation in the subsequent budget. The Mayor and City Council shall approve grant applications and submissions by adopting an official resolution, certified by the City Clerk that will allow both the submission of the grant application and the acceptance of the grant award.

B. Grant Administration

The Grants Administrator is responsible for fulfilling the financial reporting and accountability requirements of each grant the city accepts. The Grants Administrator and receiving departments are responsible for adhering to the grant program requirements and tracking all applicable expenditures for reporting purposes. The Department of Finance is responsible for accounting for grant transactions according to the Accounting, Auditing, and Financial Reporting Policy and in compliance with Generally Accepted Accounting Principles (GAAP).

The Grants Administrator is responsible for maintaining the following records for each grant award.

- Copy of Grant Application.
- Resolutions authorizing application and acceptance.
- Notification of Grant Award.
- Financial reporting and accounting requirements.
- Schedule of funding needs.

C. Auditing

The Finance Department shall comply with all local, state, and federal requirements with respect to the auditing of information as they pertain to the acceptance of grant funds. This includes the Single Audit Act with any future revisions or additional that may be applicable to city grant projects.

Appendix D (Glossary of Terms)

The Glossary section is included to assist readers with understanding the many terms used in city government (general) as well as the city's budget process (specific). Please refer to the *Acronyms/Abbreviations* section for a complete listing of the acronyms used throughout this document.

Account Number:	A system of numbering used to categorize a "group" of accounting transactions into common areas, such as salaries, utilities, etc. Account numbers are the numerical equivalent of descriptive terms (e.g., 511100 represents the account number for salaries and wages).
Accounting Period:	A period at the end of which financial statements, budgets, and other reports are prepared. Typically, an annual period within governmental finance. The city's fiscal year reporting period begins on July 1st and ends of June 30th.
Accounting Procedures:	All processes that identify, record, classify and summarize financial information to produce financial reports.
Accrual Basis of Accounting:	The method of accounting under which revenues are recorded when they are earned (whether or not cash is received at that time), and expenditures are recorded when goods and services are received (whether or not cash disbursements are made at that time).
ACFR:	The Annual Comprehensive Financial Report summarizes financial data for the previous fiscal year in a standardized format.
Acronyms:	Please see the section entitled *Acronyms/Abbreviations* for a complete listing of the acronyms used throughout this document.
Adopted Budget:	The funds appropriated by the City Council at the beginning of the year.

APPENDIX D (GLOSSARY OF TERMS)

Ad Valorem Tax:	Property taxes computed as a percentage of the value of real or personal property expressed in mills (1/100th of a dollar or $1.00 per $1,000 of taxable property value).
Amortization:	The reduction of debt by regular payments of principal and interest sufficient to retire the debt by maturity.
Appropriation:	A legal authorization granted by a legislative body to make expenditures and to incur obligations for specific purposes.
Assessed Valuation:	The Fulton County Board of Assessor's estimation of the fair market value of real and personal property.
Audit:	An independent examination of a city's financial records, transactions, and internal controls to verify accuracy, compliance with laws and regulations, and proper stewardship of public funds
Balanced Budget:	A budget in which planned revenues available equals planned expenditures.
Basis of Accounting:	A system used by an individual government to determine when revenues have been realized and when expenditures have been incurred.
Basis of Budgeting:	A system used by an individual government to determine when budgetary revenues have been realized and when budgetary expenditures have been incurred.
Bond:	A written promise to pay a designated sum of money (i.e., principal) at a specified date in the future, together with periodic interest payments at a specified rate. In the budget, these payments are identified as debt service. Bonds are typically used to obtain long-term financing for major capital improvements.
Bond Rating:	A rating provided by an independent professional credit rating agency indicating the credit worthiness of the entity.

APPENDIX D (GLOSSARY OF TERMS)

Budget:	A statement of financial position of an entity for a definite period based on estimates of expenditures during the period and proposals for financing them. The financial plan for the operation of a department, program, or project for the current year or for the duration of the project.
Budget Amendment:	The transfer of funds from one appropriation account to another (within a department within a fund), requiring approval of City Administrator, Finance Director, and Department Director. Amendments between departments and between funds require City Council approval.
Budget Calendar:	The schedule of key dates or milestones which the city follows in the preparation, adoption, and administration of the budget.
Budget Officer:	The local government officials charged with budget preparation and administration for the local government. The official title of the local government budget officer shall be as provided by local law, charter, ordinance, or appropriate resolution of the governing authority.
Budget Ordinance:	"Ordinance" or "Resolution" means that governmental action which appropriates revenues and fund balances for specified purposes, functions, or activities for a budget period.
Budget Period:	Budget period, means the period for which a budget is proposed, or a budget ordinance or resolution is adopted.
Budget Transfer:	A procedure utilized by city departments to revise budget appropriations within the departmental operating budget accounts. They transfer monies from one account to another account and does not increase or decrease the overall budget appropriation for the department.

Budgetary Control:	The control or management of a governmental unit or enterprise in accordance with an approved budget for the purpose of keeping expenditures within the limitations of available appropriations and available revenues.
Capital Assets:	Assets of significant value and having a useful life of several years. Capital assets for the City of Alpharetta have a purchase cost of $5,000 or more, and a useful life of three years or longer.
Capital Budget:	A plan of proposed capital expenditures and the means of financing them. The capital budget is usually enacted as part of the complete annual budget which includes both operating and capital outlays. The capital budget is based in a capital improvement plan ("CIP").
Capital Outlay:	An expenditure for the acquisition of, or addition to, a capital asset. Items acquired for less than $25,000 are not considered capital outlay.
Capital Projects:	Projects that result in the acquisition or construction of capital assets of a local government which are of a long-term and permanent nature. Such assets include land, buildings, and related improvements, streets and highways, bridges, sewers, and parks.
Capital Projects Fund:	A fund used to account for the financial resources to be used for the acquisition or construction of major capital facilities other than those financed by resources from enterprise fund activities.
Cash Basis of Accounting:	A basis of accounting under which transactions are recognized only when cash is received or disbursed.

APPENDIX D (GLOSSARY OF TERMS)

Chart of Accounts:	A numbering system that assigns a unique number to each type of transaction and to each budgetary unit in the organization. The City of Alpharetta utilizes the Uniform Chart of Accounts for Local Governments in Georgia as mandated by the Georgia Department of Community Affairs ("DCA").
Consumer Price Index ("CPI"):	A statistical description of price levels provided by the U.S. Department of Labor. The index is used as a measure of the increase in the cost of living (i.e., inflation).
Contingency:	A budgetary reserve set aside for emergencies, revenue shortfalls, and unanticipated expenditures.
Debt:	An obligation resulting from the borrowing of money or from the purchase of goods and services over a period of time. Debts of government include bonds, time warrants, notes, and floating debts. Examples include General Obligation Bonds and Revenue Bonds.
Debt Service:	The payment of principal and interest on borrowed funds such as bonds.
Debt Service Fund:	A fund that is used to account for the accumulation of resources for the payment of general long-term debt principal and interest.
Deficit:	The excess of an entity's liabilities over its assets or the excess of expenditure or expenses over revenues during a single accounting period.
Department:	A major administrative division of the city with indicated overall management responsibility for an operation or a group of related operations within a functional area.

Depreciation:	(1) Expiration of the service life of capital assets attributable to wear and tear, deterioration, action of the physical elements, inadequacy and obsolescence. (2) The portion of the cost of a capital asset which is charged as an expense during a period. In accounting, the cost of a fixed asset, less any salvage value, is pro-rated over the estimated service life of said asset, and each period charged with a portion of such cost. Through this process, the entire cost of the asset is ultimately charged off as an expense.
Effectiveness:	Depicts the degree to which performance objectives are being achieved or otherwise reflects the quality of local government performance.
Efficiency:	Reflects the relationship between work performed and the resources required performing it. Compares outputs to inputs.
Encumbrance:	A commitment of funds against appropriations in which the expenditure has not actually been made at the time of recording. It may be in the form of a purchase order, purchase requisition, or a contract for goods and services.
Enterprise Fund:	A fund in which the activities are supported wholly or primarily by charges and fees paid by the users of the services.
Expenditures:	The cost of goods delivered, or services rendered including operating expenses, capital outlays and debt service.
Fiduciary Fund:	A fund used to account for assets held by the city in a trustee capacity or as an agent for other governmental units and/or other funds.
Fiscal Year:	The time period designated by the city signifying the beginning and ending period for recording financial transactions. The city has specified July 1st to June 30th as its fiscal year.

Full-Time-Equivalent (FTE):	A standardized unit of measurement used to represent the total workload of one full-time employee over a defined period, typically a year. It expresses staffing levels by converting the combined hours worked by all employees [full-time (1.0 FTE) and part-time (0.5 FTE)] into the equivalent number of full-time positions
Fund:	An independent fiscal and accounting entity with a self-balancing set of accounts. These accounts record cash and other assets together with all related liabilities, obligations, reserves and equities. Funds are segregated so that revenues will be used only for the purpose of carrying out specific activities in accordance with special regulations, restrictions, or limitations.
Fund Balance:	Fund equity for governmental funds and trust funds which reflects the accumulated excess of revenues and other financing sources over expenditures and other uses for governmental functions.
GASB:	Governmental Accounting Standards Board - The body that sets accounting standards, specifically for governmental entities at the state and local levels.
General Fund:	The government's primary operating fund. It accounts for all financial resources of the general government, except those required to be accounted for in another fund. Revenue is derived primarily from property taxes, state & federal distributions, grants, and other intergovernmental revenue.
GAAP:	Generally Accepted Accounting Principles - Uniform minimum, standards used by state and local governments for financial accounting, recording and reporting, encompassing the conventions, rules and procedures that define accepted accounting principles; established by the Governmental Accounting Standards Board (GASB).

General Obligation ("GO") Bonds:	Upon voter approval at a general referendum, a project will be financed through a millage increase in ad valorem taxes for a specified period. This source of revenue is especially appropriate when the life of project or an improvement is expected to exceed 20 years and is citywide in nature or benefit.
Georgia Municipal Association:	Organization representing municipal governments in Georgia.
GFOA:	Government Finance Officers Association - Professional association of state/ provincial and local finance officers in the United States and Canada, dedicated to the sound management of government financial resources.
Goals:	A measurable statement of desired conditions to be maintained or achieved.
Governmental Fund:	This fund is an accounting segregation of financial resources. Expendable assets are assigned to the various governmental funds according to the purposes for which they may or must be used; current liabilities are assigned to the fund from which they are to be paid; and the differences between governmental fund assets and liabilities is referred to as "Fund Balance". The primary measurement focus is "flow of current financial resources". In other words, are there more or less resources than can be spent soon as a result of transactions of the period? Increases in resources are reported in the operating statement as revenues or other financing sources, and decreases are reported as expenditures or other financing uses
Governing Authority:	Governing authority means that official or group of officials responsible for governance of the unit of local government.

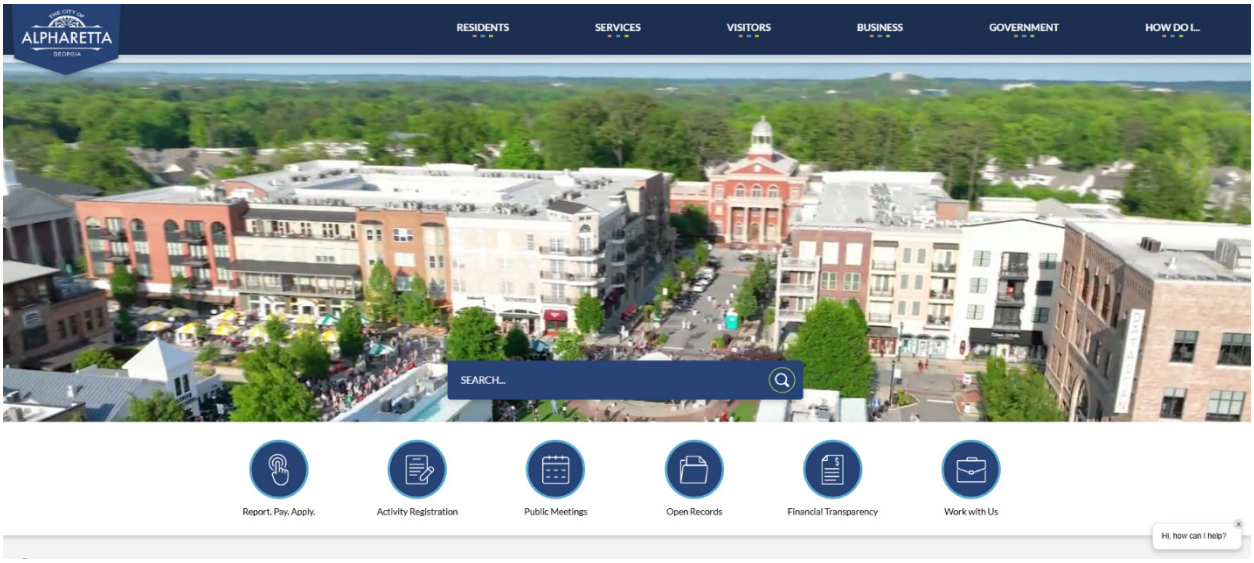
Grants:	A financial gifts, donation, or award that is made from a funding source, usually a governmental entity, to the city for the acquisition of goods, services, or land. The grant award agreement defines the city's responsibilities and duties to be exchanged for the grant. Grants are often earmarked for a specific purpose of program.
Infrastructure:	The basic installation and facilities on which the continuance and growth of the city depends, such as roads, schools, and water and sewer systems.
Inter-fund Transfer:	Payments made from one operating fund to another as a contribution to defray a portion of the recipient fund's costs.
Investments:	Securities and real estate held to produce revenue in the form of interest, dividend, rental or lease payments. The term does not include fixed assets used in governmental operations.
Legal Level of Control:	Legal level of control is the lowest level of budgetary detail at which a local government's management or budget officer may not reassign resources without approval of the governing authority. The legal level of control shall be, at a minimum, expenditures for each department for each fund for which a budget is required.
Levy:	(Verb) To impose taxes, special assessments, or service charges for the support of government activities. (Noun) The total amount of taxes, special assessments or service charges imposed by a government.
Liability:	Debt or other legal obligations arising out of transactions in the past which must be liquidated, renewed, or refunded at some future date.
Liquidity (of investments):	The ability to convert an investment to cash promptly with a minimum of risk to principal and accrued interest.

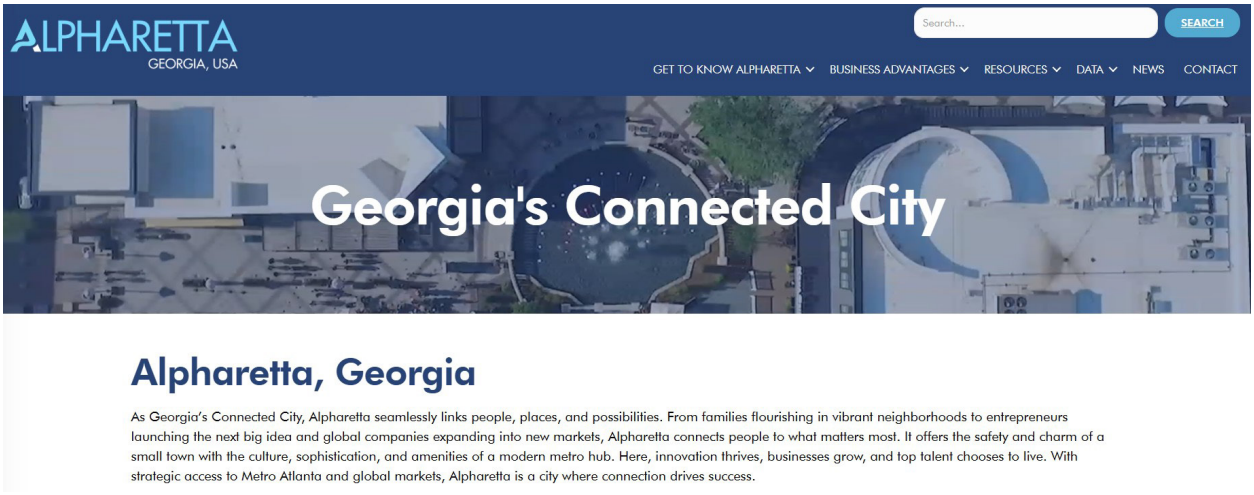
Millage Rate:	The amount of property tax stated in terms of a unit of the tax base; for example, each mill generates $1.00 of tax for every $1,000 of taxable assessed valuation on real or personal property. The millage rate is the total number of mills assessed against this value.
Mission:	The reason or purpose for the organizational unit's existence.
Modified Accrual Basis of Accounting:	The basis of accounting under which expenditures other than accrued interest on general long-term debt are recorded at the time liabilities are incurred and revenues are recorded when received in cash except for material and/or available revenues which should be accrued to reflect properly the taxes levied and revenue earned.
Objectives:	Unambiguous statements of performance intentions expressed in measurable terms.
Operating Budget:	The portion of the budget pertaining to daily operations that provide basic governmental services. The operating budget contains appropriations for such expenditures as personal services, fringe benefits, commodities, services and capital outlay.
Proprietary Fund:	These funds are sometimes referred to as "income determination," "non-expendable" or "commercial type" funds and are used to account for a government's on-going organizations and activities which are like those often found in the private sector.
Retained Earnings:	A fund equity account that reflects accumulated net earnings (or losses) in a proprietary fund. As in the case of fund balance, retained earnings may include certain reservations of fund equity.

Reserve:	An account to indicate that a portion of funds have been legally restricted for a specific purpose, or not available for appropriation and subsequent spending. A reserve for working capital is a budgetary reserve set aside for cash flow needs, emergencies, or unforeseen expenditure/revenue shortfalls.
Revenue:	Additions to assets which (a) do not increase any liability; (b) do not represent the recovery of an expenditure; (c) do not represent the cancellation of certain liabilities or decrease in assets; and (d) do not represent contributions of fund capital in enterprise and internal service funds.
Rolled-Back Millage Rate:	The millage rate necessary to raise the same amount of Ad Valorem tax revenue as the previous year, excluding taxes for new growth.
Sinking Fund:	A reserve fund accumulated over a period of time for retirement of a debt.
Special Revenue Fund:	A fund in which the revenues are designated for use for specific purposes or activities.
Tax Digest:	Official list of all property owners, the assessed value, and the tax due on their property.
Taxes:	Compulsory charges levied by a government for the purpose of financing services performed for the common benefit. Taxes levied by the City of Alpharetta are approved by the City Council and are within limits determined by the State.
User Fee:	Charges for specific services rendered only to those people paying such charges as, for example, sewer service charges.
Working Capital:	A financial metric that represents the difference between an organization's current assets and current liabilities. It measures the short-term liquidity and operational efficiency of an entity, indicating its capacity to meet near-term obligations using readily available resources.

To learn more about our great City, please visit us on the Web

www.alpharetta.ga.us





Alpharetta, Georgia

As Georgia's Connected City, Alpharetta seamlessly links people, places, and possibilities. From families flourishing in vibrant neighborhoods to entrepreneurs launching the next big idea and global companies expanding into new markets, Alpharetta connects people to what matters most. It offers the safety and charm of a small town with the culture, sophistication, and amenities of a modern metro hub. Here, innovation thrives, businesses grow, and top talent chooses to live. With strategic access to Metro Atlanta and global markets, Alpharetta is a city where connection drives success.

www.connectedalpharetta.com

THE CITY OF

ALPHARETTA

GEORGIA

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