

AGENDA  
WORK SESSION  
OF THE PERRY CITY COUNCIL  
May 2, 2016  
5:00 P.M.

1. Call to Order: Mayor James E. Faircloth, Jr.
2. Roll:
3. Items of Review/Discussion: Mayor James E. Faircloth.
  - 3a. Introduction and presentation from American Tank Maintenance.
  - 3b. Presentation by TSW for concept plans of Third Street Park site and Jaycees Park site.
  - 3c. Presentation by MCCA ReveLOCITY of the new customer service features.
  - 3d. Presentation relative to bond refunding and improvement refinancing.
  - 3e. Presentation of highlights of City of Perry Downtown Development Plan.
  - 3f. Consider proposed City of Perry Social Media Strategy.
  - 3g. Consider extension of gas services for phases 2 & 3 in Stonebridge Subdivision.
  - 3h. Discuss policies and procedures for closing of streets for events, etc.
  - 3i. Report on stormwater utilities contracting.
  - 3j. Utilities extension policy.
  - 3k. Discussion of Park Avenue improvements.
  - 3l. Discussion of code enforcement issues.
4. Council Member Items:
5. Department Head Items:
6. Adjourn.

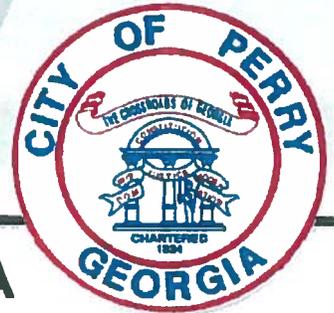
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# Electronic Presentment and Payment Solution



for the City of Perry, GA



**Bill Presentment and Electronic Payment Solutions**

**Chase Watkins**

Client Services Consultant  
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## Scope of Work

Municode will provide an electronic presentment and payment processing solution (Revalocity). The Revalocity platform is a true cloud-based out of the box configurable SAAS application. All features are quickly configurable to meet your business parameters and needs. Below describes the feature set available.

### General Platform Features

- **Branding Customization** - Website branding, content and features can be customized to suit your business requirements. The Customer Interface allows you, the client, complete control over the color scheme (accents, buttons, module frames, text, hyperlinks, etc.). Including uploading a customized banner to promote the look and feel of your branding. Additionally, all text can be customized with biller specific verbiage as needed. In addition, to enhance the customer experience, you can add a frequently asked questions page that is reached through a link at the bottom of each page.
- **Mobile Optimization** - Access is also supported from different devices, through the use of Responsive Web Design (RWD). This technology recognizes the size of the screen on the device that is being used to access the website and renders the page correctly for that screen by altering the position of text labels, shortening text and so on – as shown below.
- **Enrollment & Customer Authentication** - Residents enroll through the home page of the platform. A welcome page explaining the benefits of enrolling for the Web Portal can be configured to appear. The standard enrollment process requires them to authenticate themselves. The default authentication is to ask for the Account Number and a secondary authentication credential (i.e.: billing zip code, last four digits of SSN or Enrollment Authentication Code). Upon enrollment, residents are prompted to enter in their email address for paperless billing. Your residents can easily choose to receive a paper bill, an electronic bill, or both by simply checking a box. You could even make electric billing mandatory. The important thing is you have complete flexibility to configure according to your paperless billing strategy and can easily change the rules as your strategy and goals change.
- **Site Navigation and Account Summary Home Page** - Once the customer completes his or her enrollment or subsequent access to the site they will be taken to the Account Summary page. They can then navigate around the site using the Navigation bar. The main navigation accesses the key site functions, and then a sub-navigation bar allows access to pages within that function. Whenever a customer accesses the site they are taken to Account Summary. This page acts as the customer's home page, designed with easy quick links to main functionality. It contains a snapshot of their current account status and recent activity.
- **Link Accounts Access** - If your customers have multiple accounts with you they can easily link them together for the highest level in convenience. This sub-navigation option only appears if you have enabled the Multi-Account Profile option. Details of the account(s) linked to the customer's profile are displayed, and if there is more than one option to de-link an account. If the customer wants to link a further account they can click the Link Additional Accounts button. They can then enter the required authentication details (which will mirror your main authentication setup). Once the details have been validated, the customer will be able to review and confirm the account linking.

### Electronic/Paperless Billing Features

Building a successful electronic billing approach requires a patient, long-term strategy. Electronic billing simply isn't the slam-dunk choice that it appears. Some people still really appreciate receiving a hard-copy paper billing reminder every month. Whether that's for record-keeping or to avoid missing an email notification in a crowded inbox, to convince them to make the switch, you'll need a marketing strategy with the right mix of education and incentives. After they've decided to take the paperless switch, the right EBPP platform is crucial. In both cases the customer's chosen preference(s) are communicated daily in a batch file so paper suppression can be managed.

Despite the advantages of going paperless, some consumers seem reluctant to adopt. Why? Interestingly, however, 40% of survey respondents fear that if they go entirely paperless, they'll forget to pay their bills.

Consumers use paper bills as palpable reminders. They can't place an electronic notification in a 'to be paid' stack, attach it to the refrigerator with a magnet or leave it by the phone. This phenomenon may explain why about half of consumers receive both paper and electronic bills, and why roughly half of people who pay bills online would still rather receive bills via traditional mail.

Experience shows that the best way to neutralize this top barrier to adoption is to implement and promote notifications and alerts that advise consumers when an unpaid bill is due and about to be paid. Besides assuaging missed payment fears, bill-pay-due reminders help clients avoid late fees, in turn helping to create the impression of a biller that watches out for its customers rather than seeking to assess fees.

By introducing a risk-free environment for trying electronic billing, you can overcome mistrust and resistance to change. Fiserv's data collection observed that one biller who allowed clients to try without requiring them to switch off paper billing boosted adoption by nearly 300% over a three-month period.

*"One biller who allowed clients to try electronic billing without requiring them to switch off paper billing boosted adoption by nearly 300% over a three-month period."*

- **Additional Alerts & Notifications** - These notifications are completely self-managed by the customers so they can adjust their comfort level. By simply selecting the relevant checkbox, they can manage how and what they want to be notified about. Note: some alerts cannot be switched off (for example New Bill Ready) as the customer has to receive that alert.
  - Revalocity provides over 25 different alerts and notifications that can be sent by email or text.
- **Statement Viewing and History** - Statements generated by your bill printer can be uploaded and stored in Revalocity. The statements stored in the system are PDF reproductions of the statement normally sent to the customer. This ensures that customers who want to get information about current or past statements can retrieve them from your system without needing the intervention of a customer service representative. Since the statement is a replica, your customer will have a minimal chance for confusion. The default number of statements displayed is 13 months (one years' worth), this can be configured to show a longer time period.
- **Customer Message Options** - This optional feature allows customers to send secure, structured messages to you that are then queued for you to review and reply to. You can also use this to send secure messages to your customers. Message Type dropdown updates itself based on the previous selection with message types specific to the Message Area. Customer review all messages sent and received. Messages can be displayed in these areas: Bank Accounts, Payments, Statements, Technical.
- **Customer Documents Management** - This optional feature allows you to create an online library of generic PDF documents that the customer can access to download. The names of the online folders, folder descriptions, uploaded documents and their descriptions are all controlled by you.

## Electronic Payment Features

In order to achieve the proper electronic payment and electronic billing adoption rates, your platform needs to offer your customers a wide range of payment channels. **One size does not fit all when it comes to choosing an electronic payment and presentment provider.** Your customers need to be able to make it how they want, the way they want. Our configurable platform allows for you to control the business rules according to your policy and procedures.

### Payment Channels Options

- **Online/Web Payments**
- **Mobile Payments** - Mobile billing and payment can play a key role in your electronic billing strategy. Today, more Americans are receiving and viewing their email via a mobile device, such as a smartphone or tablet, than ever before. How does this impact your billing operation? For starters, it means that your customers are already trying to view and pay their bill from their mobile device. If you currently send email notifications to online bill recipients, they are likely to be opening these notifications on their mobile device. Without a mobile billing solution, customers cannot easily pay when they receive an electronic notification on their phone. This delays payment and can cause frustration on the part of the customer.

To ensure that you are making it as easy as possible for customers to interact and transact with your organization, it is important to offer a mobile solution. This also provides convenience to customers who might not have easy access to a checkbook or even a computer when a bill becomes due. Revalocity offers a mobile solution that makes managing and paying bills from a smartphone quick and easy:

- **Voice Call-Phone Payment:** The IVR will place a voice call to the phone and request authorization for the payment.
- **SMS-Mobile Web Payment:** The system will send a text to the phone containing a short form URL that will link to a mobile browser web page for the customer to authorize the payment.
- **SMS-Phone Payment:** The system will send a text to the phone containing a phone number to call back which will access the IVR to authorize the payment.
- **IVR Payments** - Revalocity includes a built-in, easy to use, state-of-the-art IVR payment processing that is available in both English and Spanish. This means your customers can choose to conveniently pay their bills over the phone. You can even customize the scripting for the branding and feeling. The IVR flow steps include customer authentication, read back of amount owed/payment entry, read back of available funding sources/new funding source entry and finally payment approval and

verification. In the standard flow this takes around 5 minutes. An express flow reduces this by about a minute.

- **Customer Service Agents** – Your customer service and operations staff can use Revalocity’s customer care portal to help customers including looking up bill payment profiles, review historical and pending payments, schedule and manage payments on behalf of customers and perform other day-to-day customer service tasks.
- **Walk in Payments through  MoneyGram** - Revalocity has real time integration with MoneyGram that allows your customers to pay “walk in” cash payments at nearly 40,000 US locations including, Walmart, CVS, ACE Hardware and other local Agents. Payments are received and processed in real time by Revalocity and settlement is received directly from MoneyGram.

## Payment Types Options

- **One Time Payments** - Both enrolled and non-enrolled customers can quickly make one-time payments without logging-in by method configured by the client.
- **Future scheduled payments** - Customers have the ability to schedule a series or one-time payment in the future. Again, you are in full control to configure the available options including how far in the future or what funding methods can be utilized.
- **Recurring Payments** - Recurring allows the customer to setup a series of payments, within the parameters set by the client including limiting the funding type (EFT/ACH/Echeck or Debit/Credit Cards). In order to set up recurring payment the customer must enroll and sign in to manage the process.

## Payment Method Options

- **One Time Payments** - Both enrolled and non-enrolled customers can quickly make one-time payments without logging in by method configured by the client.
- **Future scheduled payments** - Customers have the ability to schedule a series or one-time payment in the future.
- **Recurring Payments** - Recurring allows the customer to setup a series of payments, within parameters set by the client including limiting the funding type (EFT/ACH/Echeck or Debit/Credit Cards). In order to set up recurring payment the customer must enroll and sign in to manage the process.
- **Additional Payment Methods** - For inconsistent billing or unique billing situations, Revalocity has special additional payment methods:
  - **Pre-determined Payment Plans** – This option allows a customer to create a series of payments to pay off a fixed owed amount. Your configuration may vary the plans offered to customers based on the amount owed.
  - **Invoice payments** - This option allows a customer to create a single payment to pay one or more outstanding items (invoices, fees, other amounts due) on their account. Your configuration may allow same day or future dated only, or a mixture of both.
    - Details of the currently open invoices are displayed for the customer to select from. If they want to pay all of the invoices they can use the Select All checkbox, otherwise they can choose individual invoices to pay.
    - You can pass a value that specifies whether a partial payment on an invoice is allowed. If this is enabled, the customer can enter their own payment amount (any amounts paid previously are shown in the Paid Amount column). There is logic in place to prevent overpayment of an invoice. If partial payments are not allowed, selecting the invoice will set the payment amount to the value of the invoice, which cannot be edited. If there are more open invoices than can be displayed the customer can scroll through them.
  - **Balance reload program** – This option allows a customer to create a single payment to reload a credit balance on their account. Your configuration may allow same day or future dated only or a mixture of both. Customers can choose to receive an email when the balance falls below the threshold set by them, and is triggered by the receipt of an updated balance in the account data file sent by you (popular with county school systems).

## **Administrative Staff Portal with Client Reporting and Reconciliation Process**

We will provide an Administrative Portal for the city to login to. This portal will provide access to a number of features and functions to provide customer support before, during and after payment processing, as well as reporting and other tools for overall payment management. Key Features & Options:

- Role and privilege based security rights to manage users from multiple departments in a centralized system
- Browser-based customer care portal enables you to handle tier-one customer care internally
- Look up customer profiles, add comments and send messages
- Manage payments on behalf of customers; edit, cancel or schedule payments
- Capture and process payments in real-time and batch modes
- Easy flexible settlement and reconciliation of payment, return and fee information options tailored to your needs
- Complete accounting and settlement functions that integrate with CRM, finance, and general ledger systems
- Comprehensive reporting for users throughout your organization; Daily, weekly and monthly reports on payments processed, returns received, fee and settlement details, enrollment information, etc.

Your staff can use a large selection of pre-configured reports in the online client portal to access trend data and resolve inquiries. The CSR can pull reports for daily, monthly, or date range activity for payments, scheduled payments, registrations, paperless and ACH/EFT rejects. Detail on each transaction is fully viewable by the Client through drilldowns.

The reconciliation process is designed for maximum ease and accuracy. By posting all card brands together at the same time, and all payments by channel and bill type, our billers are able to quickly and easily reconcile their online payments. Our Client Portal, with its advanced reporting provides our Clients with all the accurate and up to date data they need.

All reports are available/exportable in multiple formats (HTML, PDF, CSV and Excel). MCCa will work with you to create any additional interactive and customizable online charts and reports.

## **Client Reporting and Reconciliation Process**

Your staff can use a large selection of pre-configured reports in the online client portal to access trend data and resolve inquiries. The CSR can pull reports for daily, monthly, or date range activity for payments, scheduled payments, registrations, paperless and ACH/EFT rejects. Detail on each transaction is fully viewable by the Client through drilldowns.

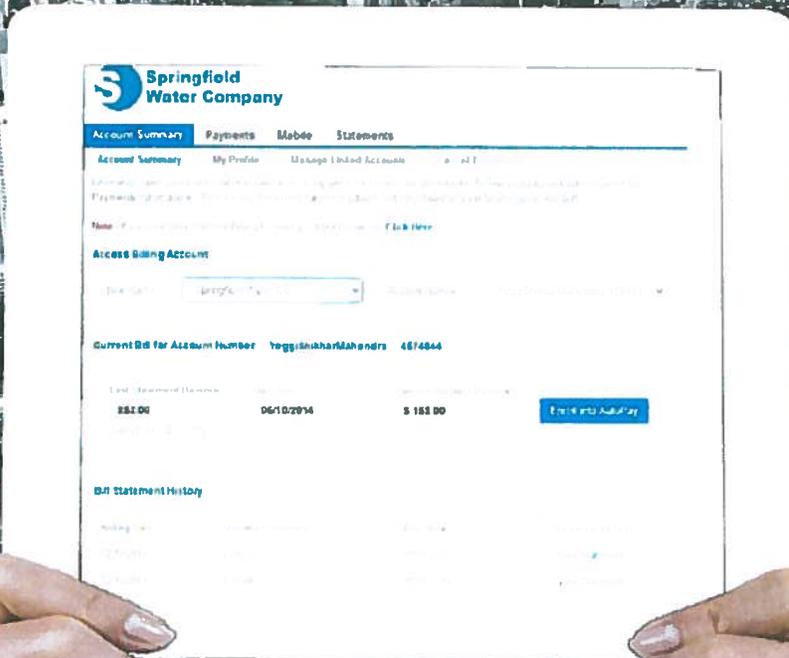
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# municode advantage

## All-in-one platform

- Electronic Bill Presentment
- Traditional Print and Mailing Service
- View Bill History
- Online and IVR Payments by Credit/Debit or Electronic Check
- Email, Text and Voice Notification



## Electronic Bill Presentment Platform

Once *Revalocity* is deployed within your organization, your customers will be able to pay their bills via the web, IVR systems or through customer service agents. It includes a customer care website so your customer service and operations staff can lookup bill payment profiles, review historical and pending payments, schedule and manage payments on behalf of customers and perform other day-to-day customer service tasks. *Revalocity* generates daily, weekly, and monthly reports to monitor enrollment activity and keep track of payments processed, scheduled, returned and pending.

In addition to processing payments through the ACH, credit card and debit card networks, *Revalocity* produces daily activity, posting and return information that seamlessly integrates with your CRM and accounting systems for settlement control and reconciliation. The result is a faster collection of funds, simplified operational processes, and greater customer satisfaction.

**Improve Customer Experience & Build a Stronger Relationship with Your Customers**

**revalocity**  
One Partner, One Simple Solution

# Platform Features

## Easy-to-use customer portal with comprehensive bill-payment features

- Easily enroll and un-enroll from bill payment service
- Sign up for paper less billing and access e-statements
- Add and manage multiple funding sources (bank accounts, credit cards and debit cards)
- Schedule and manage one-time, recurring and same-day expedited payments

## Sophisticated customer care features strengthen customer relationships and increase retention

- Browser-based customer care portal enables you to handle tier-one customer care internally
- Look up bill payment profiles and payment histories; schedule, edit and cancel payments on behalf of customers; add comments and manage funding source information
- Role and privilege based administration framework enables you to securely manage user profiles from multiple departments through a centralized system

## Complete accounting and settlement functions that integrate with CRM, finance, and general ledger systems

- Standard and customized posting and return files enable automated posting of payment information to finance and general ledger systems
- Easy reconciliation of payment, return and fee information
- Flexible settlement options tailored to your business needs

## Comprehensive reporting for users throughout your organization

- Daily, weekly and monthly reports on payments processed, returns received, fee and settlement details, enrollment information, etc.
- Ability to download reports in multiple file formats (PDF, CSV, and Excel)

## Centralized payment system enables you to consolidate payments from multiple channels systems, and departments, resulting in significant operational savings

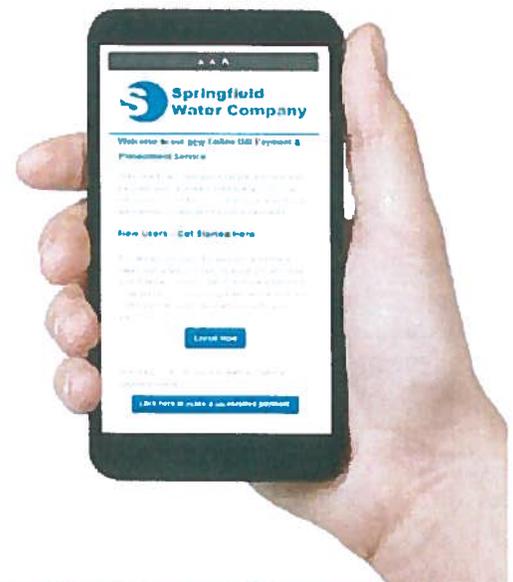
- Easily integrate and process payments from multiple customer facing channels such as Web, Mobile, Agent, IVR and Walk-In (Cash Payments)
- Capture and process payments in real-time and batch modes

## Configurable payment, fraud and risk rules framework

- Ability to manage negative file and hot-list data
- Supports configurable payment transaction limits, velocity and other business rules

## Flexible integration options puts you in control

- Fully integrate EBPP features into your existing website and control end user experience using XML API
- Enforce your organization's branding using Single Sign On or Web Direct API



Call or email us today to find out more  
850-576-3171 or [info@mccadvantage.com](mailto:info@mccadvantage.com)

# City of Perry

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## MEMO

To: Lee Gilmour, City Manager

From: Brenda King,  Director of Administration

Ref: Refunding and Improvement Bond Series 2016

Date: April 26, 2016

Upon discussion with Mr. William Camp, presently the City of Perry has the potential of savings approximately \$690,377 on a present value basis by refunding the Series 2007 Bonds and the outstanding GEFA loan. As directed, he was asked to run the numbers to include \$5.4 million to finance the construction of the new waterplant and wells. Because of the low interest rate of 2.09%, Mr. Camp also suggests considering GEFA as a funding option for the improvements or a combination thereof. Upon checking, our improvements would qualify under the Drinking Water State Revolving Loan Fund, an application would need to be completed for board approval.

Attached is the information for your and council review. Mr. Camp has been scheduled to present this information at the May 2, 2016 worksession.

Attachments



## INVESTING IN GEORGIA'S ENERGY, LAND & WATER RESOURCES

### GEFA Loan Programs – Start to Finish

The **Georgia Environmental Finance Authority (GEFA)** provides low-interest loans to local governments for water, sewer and solid waste infrastructure improvements, and the development of reservoir and water supply projects.

#### Program Overview:

- GEFA offers loans with low-interest rates and flexible terms.
- Interest rates are indexed to the sale of state general obligation bonds, allowing local governments to borrow at or below the rate received by the state of Georgia, an AAA-rated state.
- Cities, counties, water and sewer authorities, and development authorities are eligible to apply.
- Applications are accepted year-round.

#### Eligible Projects:

- Sanitary sewer or drinking water projects
- Nonpoint source projects
- Stormwater projects
- Solid waste projects

#### Applying for a GEFA Loan:

- Request an application by telephone or email, or download it at [www.gefa.org](http://www.gefa.org).
- *For federally-funded projects, a pre-application is required to be included in the State Revolving Fund (SRF) Intended Use Plan.*
  - *Pre-application is completed by the applicant and/or its consultant on or before the deadline.*
  - *Pre-applications must be submitted via GEFA's website located at [www.gefa.org](http://www.gefa.org).*
  - *GEFA and the Georgia Environmental Protection Division (EPD) score the pre-applications and rank the projects.*
  - *Highest scoring projects are put on the fundable list.*
  - *If a project(s) is on the fundable list, the applicant should continue with the steps below.*
- Application is completed by the applicant and/or its consultant.
- Attach requested engineering, service delivery information and financial data.
- Sign, date and mail one copy of the application (Parts I and II) with the attachments to GEFA.
- EPD reviews engineering for environmental acceptability.
- GEFA reviews the financial information to ensure the applicant can afford the loan.
- GEFA board of directors approves the loan.

#### Preparing Loan Documents:

- GEFA requests project budget, schedule and accountant's letter.
- Loan recipient returns completed documents (budget, schedule and accountant's letter).
- GEFA reviews accountant's letter and prepares exhibits based on the loan recipient's schedule and budget.
- GEFA prepares and sends loan agreement, promissory note and other documents to the recipient.

### **Executing Loan Documents:**

- The loan agreement and promissory note are signed by the loan recipient's authorized official.
- Loan recipient completes the signature card and loan disbursement schedule.
- Loan recipient's engineer completes the Project Performance Worksheet.
- Loan recipient signs and dates the IRS 8038G form.
- Loan recipient completes and signs the authorization for ACH credits and debits with bank information.
- Loan recipient's attorney reviews the contract package and writes an opinion letter.
- Loan recipient returns the all of the loan materials listed above to GEFA.
- GEFA reviews, executes and dates the loan agreement.
- GEFA mails the loan recipient a signed original loan agreement, closing fee amortization schedule, and loan draw request forms.

### **Drawing Loan Funds:**

- Loan recipient sends GEFA the bid procedure documentation listed in the contract's Exhibit C.
- GEFA attends pre-construction conference on GEFA's behalf, if necessary.
- Loan recipient begins work on the project; GEFA inspects it monthly.
- Loan recipient sends monthly loan draw forms with invoices to GEFA.
- GEFA reviews loan draw and approves as appropriate.
- GEFA electronically transfers the money to loan recipient's bank account.

### **Loan Closing and Repayment:**

- Loan recipient notifies GEFA at the time of the last draw that the project is complete.
- Loan recipient and its consultant provide the required close out documents to GEFA.
- GEFA conducts a final inspection.
- GEFA calculates final amount of the loan, sends an amortization (payment schedule) to the recipient.
- All payments are debited from the designated bank account via ACH.

### **Water Resources Division Staff:**

- |                   |                                     |              |
|-------------------|-------------------------------------|--------------|
| • Andrew Morris   | Water Supply Senior Program Manager | 404-584-1055 |
| • Jason Bodwell   | Loan Senior Program Manager         | 404-584-1129 |
| • Michael Roberts | Program Manager                     | 404-584-1107 |
| • Fuller Callaway | Land Conservation Program Manager   | 404-584-1035 |
| • Jenerrah Byron  | Program Manager                     | 404-584-1075 |
| • Jan Russell     | Program Coordinator                 | 404-584-1057 |



Nathan Deal  
Governor

## GEORGIA ENVIRONMENTAL FINANCE AUTHORITY

Kevin Clark  
Executive Director

### Instructions for Application Part I

---

This standard application will be used to evaluate all potential projects for funding. Applications will not be processed if any of the following information is not provided.

- All applicants must be designated as a “Qualified Local Government” by the Georgia Department of Community Affairs. Qualified Local Government status can be reviewed at: <http://www.georgiaplanning.com/planners/planreview/>.
- All applicants in the 15-county Metro North Georgia Water Planning District area must meet the requirements of the three district plans. Plans can be reviewed at: <http://northgeorgiawater.org/plans-manuals/>
- All applicants must be in compliance with all State Audit requirements. Direct compliance questions to: [locgov@audits.ga.gov](mailto:locgov@audits.ga.gov)
- Water/Sewer Authorities will be required to obtain “Full Faith and Credit” pledge from local government or different interest rates/loan terms will apply.
- All applicants must provide documentation of a Service Delivery Strategy (HB 489) agreement and provide documentation that the proposed project is in compliance with the agreement.
- If the potential project will eliminate a Consent Order, please provide documentation of the Consent Order.
- If the applicant has received a WaterFirst or Community of Opportunity designation from the Georgia Department of Community Affairs, please provide award documentation.

Applications are valid for 6 months from the date of submittal to GEFA. Applications not presented to the GEFA Board of Directors within 6 months of receipt must be resubmitted.

If applying for a grant only, only Part I submission is required. Documentation of the funding balance must be provided with the application.

<i>For GEFA and EPD use:</i>	
Project number:	
GEFA amount requested:	
Date received by GEFA:	
Date received by EPD:	
EPD initial approval:	



<i>Applicant Please select the appropriate program</i>	
<input type="checkbox"/>	Georgia Fund (State Funds)
<input type="checkbox"/>	State Revolving Fund (SRF - Federal Funds)
<input type="checkbox"/>	Water Supply Loan (State Funds)
<input type="checkbox"/>	Water Supply Planning Only Loan (State Funds)
<input type="checkbox"/>	Environmental Emergency (State)
<input type="checkbox"/>	Solid Waste Loan (State Funds)
<input type="checkbox"/>	Interim Financing (State Funds)

## GEFA LOAN APPLICATION FORM PART I

### PROJECT DESCRIPTION

\*Please fill out completely. Items left blank may cause delays in the review and approval process.

Applicant Name			
Contact Person		Title	
Street Address OR Post Office box 1			
Street Address 2			
City and Zip Code + 4	(City)	(Zip Code+4)	County
Telephone Number		Fax Number	
E-Mail Address	(Primary Email)		
	(Secondary Email)		
Federal EIN		DUNS No.	
Congressional District			
Project Place of Performance (where the work will occur)			
Congressional District (Of Project)			

**(FOR SRF Applicants Only)** Has the applicant initiated or completed the State Environmental Review Process with Georgia EPD for this project?

YES     NO     N/A

**Metro North Georgia Water Planning District** Is your community in the MNGWPD?

YES     NO

If **yes**, are you in compliance with district plan requirements?

YES     NO     N/A

**Consent Order** Will this project eliminate a Notice of Violation (NOV), Administrative Order, Consent Order, Court Order, etc.? If **yes**, provide a copy of the violation.

YES       NO

**WaterFirst or Community of Opportunity Designation** If your community has been designated a WaterFirst Community or Community of Opportunity by the Georgia Department of Community Affairs (DCA). If **yes**, provide documentation of the award(s).

YES       NO

**Service Delivery Strategy (SDS)** Is the proposed project consistent with or at least not inconsistent with your HB489 Service Delivery Strategy?

YES       NO

(Please attach a copy of the one or two pages from your SDS that document this).

**NOTE:** if you checked yes, you are certifying that the proposed project is consistent with your HB 489 SDS.

**Plumbing Code Compliance (for cities and counties only)** In order to qualify for financing, you must have adopted the high-efficiency plumbing code requirements outlined in O.C.G.A § 8-2-3. Please provide GEFA a copy of the relevant section of your local code.

**Please provide the basic information for each of the following questions:**

- 1) **Project Name and Project Description** You must provide a **short description** of the proposed project in the "**box below**." Attach a separate sheet if necessary along with a copy of the preliminary engineering report.

**Project Name:**

**Description:**

**Please place a check mark in the space(s) next to the project type(s) which best describes your project:**

<i>WATER SUPPLY (water)</i>		<i>WATER QUALITY (sewer)</i>	
<input type="checkbox"/> Plant Construction	<input type="checkbox"/> Emergency Project	<input type="checkbox"/> Plant Construction	<input type="checkbox"/> Pump Station
<input type="checkbox"/> Plant Rehabilitation	<input type="checkbox"/> Water Tank	<input type="checkbox"/> Plant Rehabilitation	<input type="checkbox"/> Emergency Project
<input type="checkbox"/> Line Construction	<input type="checkbox"/> Well	<input type="checkbox"/> Line Construction	<input type="checkbox"/> CSO Tunnel
<input type="checkbox"/> Line Rehabilitation	<input type="checkbox"/> Reservoir	<input type="checkbox"/> Line Rehabilitation	<input type="checkbox"/> Non-Point Source
<input type="checkbox"/> Other: _____		<input type="checkbox"/> Other: _____	

2) **Easements**

Does this project require an easement?  YES  NO

If yes, please indicate how many easements?  How many has been acquired?

3) **Project Cost** Give an estimated cost outline for the entire project by line item.

Construction Cost:	\$
Engineering Cost:	\$
Contingency Cost:	\$
	\$
	\$
Total:	\$

4) **Early Project Costs** Engineering and design costs incurred prior to the execution of a loan agreement are eligible for reimbursement with a GEFA loan as long as these costs are necessary for the completion of the project and consistent with the final budget. Does your community anticipate seeking reimbursement of engineering or design costs incurred prior to the execution of the loan agreement?

YES  NO

If **yes**, approximately how much in early costs does your community anticipate submitting for reimbursement under the proposed loan?

\$

5) **Funding sources** Please list all funding sources which are proposed to be utilized to complete this project. List each source and funding amount. (If a commitment has been secured from any of these funding sources, list the commitment date and attach a copy of the commitment letter.)

Amount being requested from the Georgia Environmental Finance Authority:			\$
Other funding source(s):	Date available:	Amount:	
		\$	
		\$	
		\$	
Total Project Funding:			\$

- 6) **Schedule** What is the proposed project schedule? If actual dates are available, please include them in the appropriate column.

ACTION	ACTUAL DATE(S)	PROPOSED DATE(S)
Complete project planning	Click here to enter a date.	Click here to enter a date.
Initiated design	Click here to enter a date.	Click here to enter a date.
Plans & specs submitted to EPD	Click here to enter a date.	Click here to enter a date.
Bid opening	Click here to enter a date.	Click here to enter a date.
Notice of award	Click here to enter a date.	Click here to enter a date.
Notice to proceed with construction	Click here to enter a date.	Click here to enter a date.
Initiation of construction	Click here to enter a date.	Click here to enter a date.
Completion of construction	Click here to enter a date.	Click here to enter a date.

- 7) **Emergency Loan** Will this project assist the community in meeting an emergency public health or safety need? If yes, please explain the nature of the emergency and facilities that have failed and what repairs or additions are needed to protect the local health or environment.

--

- 8) **Project Engineer** Provide the following information:

<b>Firm Name</b>			
<b>Address</b>			
<b>City, State &amp; Zip</b>	City:	State:	Zip Code+4
<b>Engineer Name</b>			
<b>Telephone Number</b>	( )	Fax Number	( )
<b>Primary E-Mail Address</b>		Secondary E-Mail	

**How you heard about GEFA** (check all that apply)

- Applicant is a returning customer       GEFA website – [www.gefa.org](http://www.gefa.org)  
Conference:    ACCG    GRWA    GMA    GAWP    GEDA  
 EPD representative  
 Consulting engineer  
 Other: \_\_\_\_\_

I certify that I am authorized to sign this application on behalf of our governing body.

Authorized Official	
I certify that I am authorized to sign this application on behalf of our governing body.	(Enter YES)
Title	
Date	

**Note:** Submit this application for a GEFA loan. Mail to:

Water Resources Division  
Georgia Environmental Finance Authority  
233 Peachtree Street, NE, Harris Tower, Suite 900  
Atlanta, Georgia 30303-1506

**GEORGIA ENVIRONMENTAL FINANCE AUTHORITY**  
**LOAN APPLICATION FORM PART II INSTRUCTIONS**

**FINANCIAL DOCUMENTATION**

GEFA will evaluate your jurisdiction's ability to repay a proposed loan. The application consists of:

1. Existing data in engineering, financial/design, audit and other reports; and
2. Information supplied by you on the form.

The following instructions are keyed to the numbered sections on the application form.

Instructions are provided for those questions in the application that might not be easily understood, or that warrant special attention. It is not necessary to send GEFA documents that we have on file.

**I. GENERAL INFORMATION**

Enter the official or legal name of the applying city, county or authority.

Enter the name and title of the official of the jurisdiction who can answer questions about the application. The contact person must be an elected official or an employee of the jurisdiction.

Enter the contact information for the city/county/authority attorney, independent auditor and finance director.

**II. CHECKLIST OF DOCUMENTS TO BE SUBMITTED AS PART OF THIS APPLICATION**

**A. ACCOUNTING DATA:**

**1. FISCAL YEAR:** Enter the month and day on which your fiscal year ends. Please indicate if your jurisdiction has multiple fiscal years; i.e., major operation funds operate on different fiscal years.

**2. AUDITS:** Enclose with the completed application one (1) copy of your audit or annual financial report for the most recently completed four (4) fiscal years (preferably in electronic form, if available). Please enter the fiscal years in the blanks beginning with the most recent year in the first blank. These reports must include all operations of your jurisdiction. If certain funds are reported in separate documents, please include these reports as well. If different funds/operations have different fiscal years, please note this below the year's listing for this item. If your audit(s) do not provide an accounting for the water and sewer utility separate from other utilities that you may have, it will be necessary for you or your independent auditor to provide such an accounting in addition to a copy of the audit(s).

**3. UNAUDITED ACCOUNTING DATA:** Georgia law requires that a certified audit be completed within six months after the close of a local government's fiscal year. If the local government does not have a completed audit within six months after the close of its fiscal year, then it should have an extension letter from the Georgia Department of Audits and Accounts. For purposes of this application, some governments with recently ended fiscal years may not have audited data available for the latest fiscal year. In order for GEFA to have the most current financial data, please submit draft audit statements or other accounting data

that shows concisely the yearly ending balances for the various line items of revenue, expense, assets and liabilities for the general fund, water/sewer enterprise fund (exclusive of all other utilities), and debt service funds. Enter the year covered by this unaudited data in the space provided. Submission of this data does not alter the requirement contained in section II.A.I. above for copies of the most recent four years of audits. The purpose of this requirement is to have the most recent information upon which to make a credit analysis decision.

**B. BOND ORDINANCE:** If your water and/or sewer system has any outstanding revenue bonds (including security for U.S. Department of Agriculture (USDA) debt) issued over the past three years, please enclose a complete copy of the most recent revenue bond ordinance or official statement (preferably in electronic form, if available). This is usually the ordinance that governs the financial operations of your system, especially the disposition of revenues, the liens on system revenues, and the coverage necessary to issue additional debt. Please enter the name and date of the bond issue covered by the ordinance or official statement enclosed. If you have no debt currently outstanding on your water and/or sewer system, write 'NONE' in the space provided.

**C. AMORTIZATION SCHEDULE:** In order to assess your total debt requirements, submit an amortization schedule that includes all principal and interest requirements for all revenue bond issues currently outstanding on your water/sewer system and any proposed to be issued whether or not as part of this project. This schedule is generally not found in the bond ordinance required by II.B. above.

#### **D. DEBT RATING**

**E. GEFA FUNDING METHOD:** Indicate by checking the applicable block what funding source(s) will be used to repay the debt incurred on this project. If the choices do not fit your proposed funding plan, please check block #4 and indicate that additional explanations are enclosed to define your funding scenario.

**F. DESIRED AMORTIZATION PERIOD:** GEFA's policy contains general guidelines for amortization periods based on the principal amount of the loan. The amounts and periods are:

<u>Loan Principal Amount</u>	<u>Amortization Period (Years)</u>
Less than \$250,000	10
\$250,001 - \$750,000	15
More than \$750,000	20 (maximum)

An amortization period shorter or longer than the stated policy guidelines may be requested. If a local government can pay its loan sooner, then it can save interest costs over the life of the loan.

**G. FINANCIAL/DESIGN REPORTS:** Please enclose one (1) copy each of the reports (if available) generated during the planning and design process for the project covered by this loan application. These documents would normally address the following items;

1. Financial impact and reviews of the local jurisdiction's economy, demand and costs;
2. Any proposed or newly implemented rate structures including a rate study;
3. The current operating budget which includes water/sewer as well as general operations. Indicate beginning and ending dates of your budget year. (Include one (1) copy of the current budget with application);
4. Detailed cost of operations and maintenance of the project when completed and put into operation; as well as revenues forecasted to be generated as a result of this project;
5. The projected sources of funding for the total cost of the finished project;

6. Detailed project construction budget (including major components such as plant, lines, land acquisition, legal and administrative);
7. The customer base from which revenue will be drawn to pay operating costs and debt service for the system including the project to be financed;

These items are usually found in the financial/design, rate study or other reports done by your consulting engineer. Please indicate in the space provided how many documents are enclosed and the names and dates of these documents to ensure their receipt.

**H. WATER/SEWER RATE STRUCTURE:** Please enclose one (1) copy of your ordinance or other document(s) that defines and lists the water/sewer rates and other charges; i.e., tap-on fees, reconnect charges for your system. Enter the title and effective date of the enclosed document. **If rates were increased in the last 24 months, please include old rates. Please include any future planned rate changes also in this section.**

**If ERUs are used for calculating rates, please provide a translation of these as rates per 1,000 gallons.**

**I. ONE-TIME OPERATING EXPENSES:** Please enclose copies of backup documentation from the General Ledger or paid invoice receipts for justifying one-time expenses in the applicable fund that will repay the GEFA debt. One-time expenses could be unexpected repairs to the tank, pump station, wells, etc.

**J. Operating Transfers:** For the most recent completed audit and the current fiscal year, enter the amounts that were 'Transfers In' to the Water and Sewer Enterprise Fund, the fund that will be repaying the GEFA debt, from another fund, e.g., from the General Fund. Please explain the reason for this practice and if it will continue into the future and why. Enter the future amounts planned for the 'Transfers In'.

For most recent completed audit and the current fiscal year, enter the amounts that were 'Transfers Out' from the Water and Sewer Enterprise Fund, the fund that will be repaying the GEFA debt, to another fund, e.g., to the General Fund. Please explain the reason for this practice and if it will continue into the future and why. Enter the future amounts planned for the 'Transfers Out'.

**K. BAD DEBT AND AVERAGE COLLECTION PERIOD:** Enter the past four (4) Audited Fiscal Years the Bad Debt that was calculated for the Water and Sewer Fund, the fund repaying the GEFA debt.

Enter the past four (4) Audited Fiscal Years the calculated Average Collection Days on the monthly Water and Sewer Service Billings.

**III. PROJECT FINANCIAL DESIGN:** GEFA will be assessing the proposed project's financial viability relating to the projected revenue and its ability to cover or exceed your present and proposed debt repayment obligations.

**A. AMOUNT REQUESTED:** Please enter the amount requested in the space provided.

**B. 1. 2. 3. FORECASTED REVENUES (Not cumulative):** If your project proposes additional annual revenue generation from new residential, commercial, and industrial customers, and from new rates, please note in the appropriate space the source and expected annual (yearly) amount of these new revenues. If rates are to be phased in, or if tap or impact fees are to cover initial debt service with rates paying the debt service in future years, please attached a schedule noting the expected revenue flow over time. It is imperative that revenue be

generated in all years subsequent to the project coming on line to defray debt service if existing revenue is insufficient to cover the proposed debt burden.

If natural population growth or other economic growth not related to the project will generate additional revenues, please include the forecasted annual revenues in the space provided. If SPLOST will be collected for the capital project and will be used for operations and debt repayment related to the project, please provide referendum and include annual amounts in the space provided.

**B. 4. FORECASTED EXPENSES (Not cumulative):** If, as a result of the project, the system will incur increased annual operating and maintenance expenses (i.e., electricity, additional personnel, supplies), please note in the space provided the amount by which the annual operating expenses will increase or decrease. Do not add in or estimate the costs for your entire system; include only the increased cost for the proposed project. GEFA will look at the total system operation from your audit reports or other data.

**B. 5. NEW NON-GEFA DEBT:** If you propose to incur or issue additional debt (other than the GEFA loan requested in this application) to complete the proposed project, please indicate the annual amount of increased debt service costs to the system and the source and principal amount of the debt in the appropriate spaces. Do not include the debt service for the GEFA loan. This will be calculated separately.

#### **IV. WATER/SEWER SYSTEM OPERATIONS INFORMATION**

##### **Current Customer Base Analysis**

Please fill in all of the blocks.

#### **V. FINANCIAL INFORMATION**

**A. PROPERTY TAX COLLECTIONS:** Enter the amounts of property taxes collected for the last three (3) audited fiscal years of your jurisdiction on the line beginning 'Property Taxes Collected'. Enter the amounts of property taxes levied ('the Digest') for the same fiscal year on the line beginning 'Property Taxes Levied'.

**B. PROPERTY VALUES:** Enter the assessed value of taxable property (including public utilities) from the tax digest for the last three (3) audited fiscal years before the date of submission of this application. Enter this information on the line beginning 'Assessed Value' and in the column under the appropriate fiscal year. Enter the fair market (100 percent) value of taxable property (including public utilities, but not automobiles) from the tax digest. Enter this information on the line beginning 'Fair Market Value.' Please fill in the fiscal year in the space provided in each column heading.

When the forms and attachments are complete, please mail to:

Georgia Environmental Finance Authority  
Water/Sewer Loan Application  
233 Peachtree St NE  
Harris Tower – Suite 900  
Atlanta, GA 30303

Revised November 2014

<i>For GEFA's use</i>	
Project number:	
GEFA amount requested:	
Date received by GEFA:	



<i>Applicant: Please select the appropriate program.</i>	
<input type="radio"/>	Georgia Fund (State)
<input type="radio"/>	State Revolving Fund (SRF - Federal Funds)
<input type="radio"/>	Water Supply Loan (State Funds)
<input type="radio"/>	Water Supply Planning Only Loan (State Funds)
<input type="radio"/>	Environmental Emergency (State)
<input type="radio"/>	Solid Waste Loan (State Funds)
<input type="radio"/>	Interim Financing (State Funds)

## GEFA LOAN APPLICATION FORM PART II

### PROJECT FINANCIALS

\*Please fill out completely. Items left blank may cause delays in the review and approval process.

#### I. General Information

Applicant Name			
Contact Person		Title	
Street Address OR Post Office box 1			
Street Address 2			
City and Zip Code + 4	<small>(City)</small>	<small>(Zip Code+4)</small>	County
Telephone Number		Fax Number	
E-Mail Address	<small>(Primary Email)</small>	<small>(Secondary Email)</small>	
Federal EIN		DUNS No.	
Congressional District			
Project Place of Performance (where the work will occur)			
Congressional District (Of Project)			

**Contact information for city/county/authority attorney, independent auditor and finance director.**

Attorney	Auditor	Finance Director
Name	Auditor Name, Firm Name	Name, Title
Street address or post office box	Street address or post office box	Street address or post office box
City, state, & zip code	City, state, & zip code	City, state, & zip code
(   )      (   )	(   )      (   )	(   )      (   )
Telephone      Fax number	Telephone      Fax number	Telephone      Fax number
E-mail address	E-mail address	E-mail address

**II. CHECKLIST OF DOCUMENTS TO BE SUBMITTED AS PART OF THIS APPLICATION:**

If you know the documents requested below are already on file at GEFA, you do not need to resubmit documentation. Write title and/or date as requested and the words "on file at GEFA."

**A. ACCOUNTING DATA:**

1. **FISCAL YEAR:** Fiscal year ending date: \_\_\_\_\_  
(month – day)

2. **AUDITS:** Due to physical space constraints, GEFA is no longer able to retain hard copies of annual audits. Hard copy audits will be discarded after use. GEFA requests the submittal of electronic audits (List by year)

	electronic (enclosed)	www.	electronic (at website)	hard copy (enclosed)
FY _____	<input type="checkbox"/>	_____	_____	_____
FY _____	<input type="checkbox"/>	_____	_____	_____
FY _____	<input type="checkbox"/>	_____	_____	_____
FY _____	<input type="checkbox"/>	_____	_____	_____
FY _____	<input type="checkbox"/>	_____	_____	_____

3. **UNAUDITED ACCOUNTING DATA:** Please enclose interim summary-level financial statements (Statement of Revenues and Expenses). Also include cash reserve balances, as of the most recent month end, for the general fund and the water/sewer enterprise fund(s). Please indicate if cash balances are reserved or restricted.

Enter the fiscal year covered by this unaudited data: FY \_\_\_\_\_

B. **BOND ORDINANCE:** If you have outstanding bond debt which was issued **during the last 3 years**, please submit a copy of the most recent official statement or revenue bond ordinance in electronic format. Please include the name and the date of bond issuance below: **(Mail Documents)**

\_\_\_\_\_ **Date:** \_\_\_\_\_

C. **AMORTIZATION SCHEDULE:** Copy of a complete amortization schedule (including principal and interest) for all revenue bond issues currently outstanding (or proposed as part of the project covered under this application) on the water/sewer system, if any. **(Mail Documents)**

\_\_\_\_\_

D. **DEBT RATING:** If you have an assigned Debt Rating by S&P, Moody's, or Fitch, please indicate the current rating and the date it was obtained. Non-rated borrowers should enter "NR."

Rating/Rating Agency: \_\_\_\_\_ **Date:** \_\_\_\_\_

E. **GEFA FUNDING METHOD:** The funding method to pay debt service costs of the project:

Name of fund(s): \_\_\_\_\_

- Type of fund.  
Check any that apply:
- 1. Service charges and fees only
  - 2. Service charges and general revenues combined
  - 3. General revenues only
  - 4. Local option sales tax or other dedicated revenue source

**F. DESIRED GEFA AMORTIZATION PERIOD:** GEFA loans are normally assigned amortization periods based on the loan principal as follows: Less than \$250,000 (10 years); \$250,001 - \$750,000 (15 years); over \$750,000 (20 years).

If you would like an amortization period different from these guidelines, please indicate the preferred number of years:

5 Years    10 Years    15 Years    20 Years

**G. FINANCIAL DESIGN REPORTS:** If applicable to community, please check the appropriate documents and attach a copy of: (Mail Documents)

- Financial Reports Reviewing Economy, Demand and Costs
- Rate Study
- Current Year Operating Budget for Water/Sewer and General Operations
- Revenue and Expense Financial forecasts for the Water/Sewer and/or other Applicable Fund
- Project Funding Plan and/or Capital Improvements Plan, together with any and all assumptions from which the report is based
- And other report(s) that define the customer base (number or customers, usage, etc.)

Number of documents enclosed (       )

Name(s) and date(s) of documents enclosed:

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**H. WATER/SEWER RATE STRUCTURE:** Copy of ordinance or other document which defines the water and/or sewer rates for your jurisdiction. Please write the title and effective date of the document enclosed:

Title: \_\_\_\_\_

Effective Date: \_\_\_\_\_

**(Mail Rate Structures)**

Current Rate Structure (Effective Dates):

\_\_\_\_\_

Prior Rate Structure (Effective Dates):

\_\_\_\_\_

Planned Future Rate Structure (Effective Dates):

\_\_\_\_\_

*If applicant is an "Authority that does not have independent taxing authority," the Authority must receive a full faith and credit pledge of a local government. If this applies to your application, please indicate with which local government you will get a full faith and credit pledge – \_\_\_\_\_.*

**I. ONE-TIME OPERATING EXPENSES** (Example: Unexpected repairs to tank, pump station, wells, etc.):  
**(Mail Detailed Backup Documentation):**

**Expense Line Items:**  
 Most Recent Audited Fiscal Year: \$ \_\_\_\_\_  
**Explanation:**

**Expense Line Items:**  
 Current Fiscal Year Forecasted One-Time Expenses: \$ \_\_\_\_\_  
**Explanation:**

**Expense Line Items:**  
 Next Fiscal Year Forecasted One-Time Expenses: \$ \_\_\_\_\_  
**Explanation:**

**J. OPERATING TRANSFER** (To and From Water and Sewer Enterprise Fund and/or Other Applicable Enterprise Fund):

Most Recent Audited Fiscal Year: Transfers In \$ \_\_\_\_\_  
 Transfers Out \$ \_\_\_\_\_  
**Explanation of Transfers:**

Current Fiscal Year Forecast: Transfers In \$ \_\_\_\_\_  
 Transfers Out \$ \_\_\_\_\_  
**Explanation of Transfers:**

Planned/Budgeted Future Years: Transfers In \$ \_\_\_\_\_  
 Transfers Out \$ \_\_\_\_\_  
**Explanation of Transfers:**

**K. BAD DEBT AND AVERAGE COLLECTION PERIOD** (Last 4 Audited Years):

	FY _____	FY _____	FY _____	FY _____
Bad Debt	\$ _____	\$ _____	\$ _____	\$ _____
Average Collection Days on Monthly Service Bills	_____ Days	_____ Days	_____ Days	_____ Days

**III. PROJECT FINANCIAL DESIGN**

**A. AMOUNT REQUESTED:** The principal amount of loan being requested of GEFA: \$ \_\_\_\_\_

**B. FORECASTED REVENUES & EXPENSES:**

**By what amount are annual revenues and expenses projected to increase or decrease as a result of THIS PROJECT AND OTHER PLANNED CHANGES?**

Enter appropriate amounts below for the next three fiscal years and explain the rationale for any assumptions used: 1) additional customers 2) rate increase 3) other revenues 4) increase (decrease) in operating and maintenance (O&M) costs 5) debt service for issuance of new debt.

	FY ( )	FY ( )	FY ( )
<b>1. New Customers/Revenue:</b>			
Projected number of new customers each year (not cumulative)	# _____	# _____	# _____
Residential	# _____	# _____	# _____
Commercial	# _____	# _____	# _____
Industrial	# _____	# _____	# _____
Other (e.g. Apt. Complexes, Malls)	# _____	# _____	# _____
Projected new service revenue (not cumulative)	\$ _____	\$ _____	\$ _____
Projected new tap/connection/impact fees available for operations (not cumulative)	\$ _____	\$ _____	\$ _____
<b>2. Rate Increase:</b>			
Projected new revenue each year (not cumulative)	\$ _____	\$ _____	\$ _____
Projected % increase	_____ %	_____ %	_____ %
<b>3. Additional Increases to Revenue (not cumulative)</b>			
Other _____	\$ _____	\$ _____	\$ _____
Regular population growth revenue (not cumulative)	\$ _____	\$ _____	\$ _____
SPLOST (Referendum Attached) (NOT cumulative)	\$ _____	\$ _____	\$ _____
<b>4. O&amp;M expenses increases: (not cumulative)</b>	\$ _____	\$ _____	\$ _____
<b>5. New "Non-GEFA" debt service:</b>	\$ _____	\$ _____	\$ _____

Indicate the source and principal amount of other loan funds that will be used for this project (i.e. USDA, local bond issue, bank financing).

\$ \_\_\_\_\_ Source: \_\_\_\_\_  
 \$ \_\_\_\_\_ Source: \_\_\_\_\_

**IV. WATER/SEWER SYSTEM OPERATIONS INFORMATION – Current Customer Base Analysis**

Complete the following information as of the last day of the last month preceding the submission date of this application. If the answer for any block is "NONE", put **NONE** or **-0-** rather than leaving it blank.

	WATER		SEWER	
	A. inside jurisdiction	B. outside jurisdiction	C. inside jurisdiction	D. outside jurisdiction
1. # of customers RESIDENTIAL				
	Average use per/residential customer: gal/m		Average use per/residential customer: gal/m	
2. # of customers COMMERCIAL				
	Average use per/commercial customer: gal/m		Average use per/commercial customer: gal/m	
3. # of customers INDUSTRIAL				
	Average use per/industrial customer: gal/m		Average use per/industrial customer: gal/m	
4. # of customers with un-metered service				

**V. FINANCIAL INFORMATION**

**A. PROPERTY TAX COLLECTIONS:** Property tax collections for the last 3 audited years:

	FY _____	FY _____	FY _____
Property Taxes Collected	\$ _____	\$ _____	\$ _____
Property Taxes Levied	\$ _____	\$ _____	\$ _____

**B. PROPERTY VALUES:** Assessed and market (100%) value of taxable real and personal property (Including public utilities, but not automobiles) for the most recent audited year.

	FY _____
Assessed Value	\$ _____
Fair Market Value	\$ _____

Please mail or Email the completed forms and attachments to:

Water/Sewer Loan Application  
 Georgia Environmental Finance Authority  
 233 Peachtree Street, NE, Harris Tower, Suite 900  
 Atlanta, Georgia 30303-1506



**CITY OF PERRY, GEORGIA  
WATER & SEWERAGE  
REFUNDING BONDS UP-DATE**

May 2, 2016

Bill Camp, Managing Director  
3050 Peachtree Road, Suite 702  
Atlanta, Georgia 30305  
404.240.6805  
william.camp@raymondjames.com

**RAYMOND JAMES**

# OUTSTANDING W&S SYSTEM DEBT

Date	Senior Lien Water & Sewerage Revenue Bonds			Junior Lien Debt			Combined P&I
	Principal	Coupon	Interest	Principal	Coupon	Interest	
10/01/2016	55,000.00	3.600%	374,541.26	34,168.27	3.750%	5,500.71	1,076,706.24
10/01/2017	55,000.00	3.600%	372,561.26	47,071.35	3.750%	5,820.63	1,086,946.04
10/01/2018	60,000.00	3.900%	370,581.26	48,861.49	3.750%	4,030.47	1,089,790.02
10/01/2019	65,000.00	3.900%	368,241.26	50,719.74	3.750%	2,172.24	1,104,082.04
10/01/2020	65,000.00	3.900%	365,706.26	26,078.69	3.750%	367.30	1,076,310.65
10/01/2021	75,000.00	3.900%	363,171.26				1,054,308.86
10/01/2022	75,000.00	3.900%	360,246.26				1,051,209.46
10/01/2023	80,000.00	3.900%	357,321.26				1,051,898.86
10/01/2024	715,000.00	4.000%	354,201.26				1,069,201.26
10/01/2025	745,000.00	4.000%	325,601.26				1,070,601.26
10/01/2026	775,000.00	4.000%	295,801.26				1,070,801.26
10/01/2027	805,000.00	4.000%	264,801.26				1,069,801.26
10/01/2028	840,000.00	4.125%	232,601.26				1,072,601.26
10/01/2029	875,000.00	4.125%	197,951.26				1,072,951.26
10/01/2030	910,000.00	4.125%	161,857.50				1,071,857.50
10/01/2031	945,000.00	4.200%	124,320.00				1,069,320.00
10/01/2032	985,000.00	4.200%	84,630.00				1,069,630.00
10/01/2033	1,030,000.00	4.200%	43,260.00				1,073,260.00
<b>Total</b>	<b>\$9,155,000.00</b>	<b>-</b>	<b>\$5,017,395.14</b>	<b>\$206,899.54</b>	<b>\$206,899.54</b>	<b>\$17,891.35</b>	<b>\$19,301,277.23</b>

## W&S SYSTEM COVERAGE

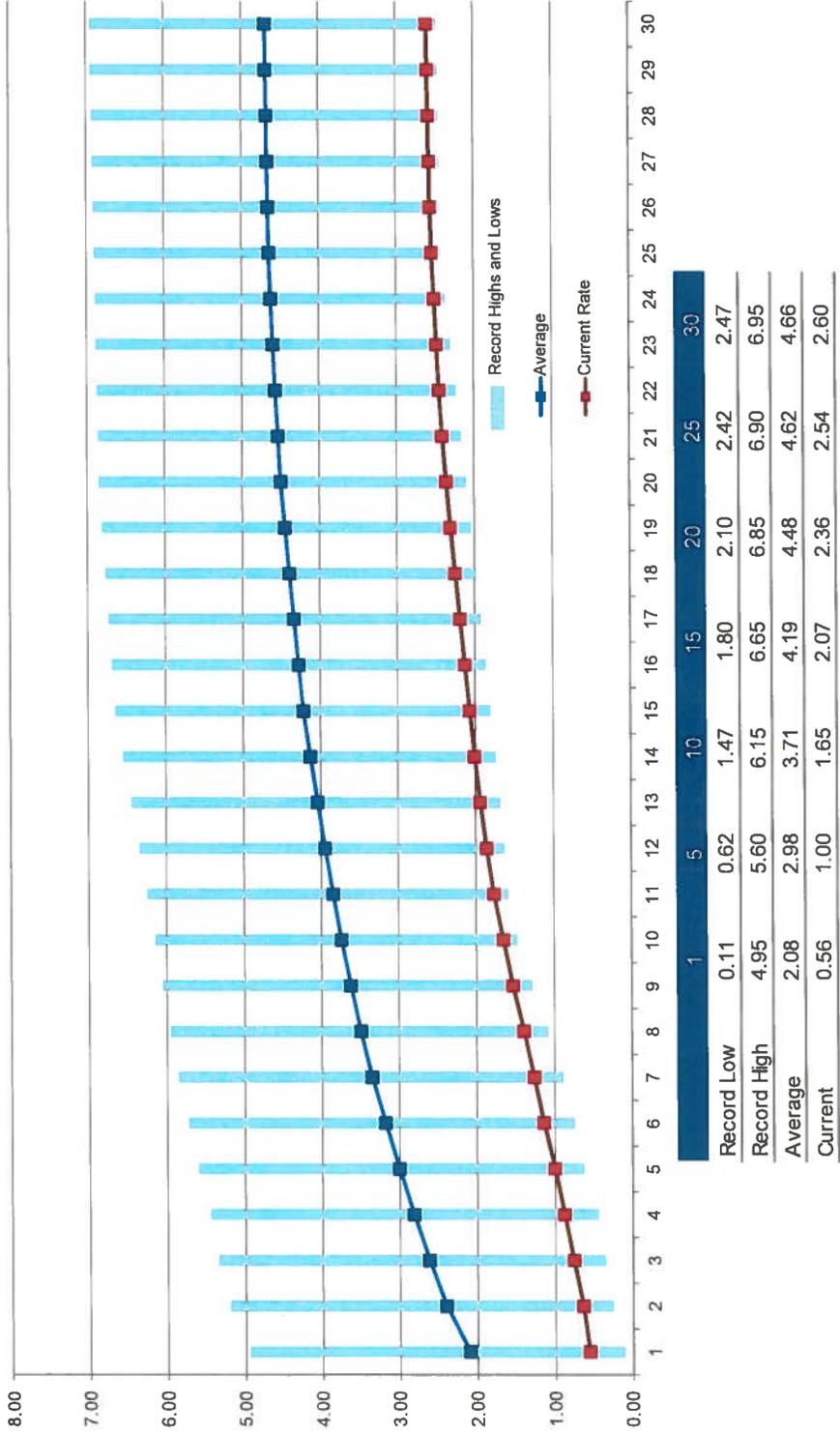
	FYE 6/30/2015	FYE 6/30/2014	FYE 6/30/2013	FYE 6/30/2012	FYE 6/30/2011
Operating Revenues	6,105,689	5,439,779	5,294,439	5,381,011	5,502,242
Operating Expense	5,418,787	4,946,900	5,017,619	4,670,980	4,467,460
<b>Net Operating Income</b>	<b>686,902</b>	<b>492,879</b>	<b>276,820</b>	<b>710,031</b>	<b>1,034,782</b>
<i>Plus/Minus:</i>					
plus Depreciation	1,433,017	1,384,331	1,342,665	1,287,378	1,198,916
plus Interest Income	14,957	1,541	11,044	9,946	13,223
<b>Net Income Available for Debt Service</b>	<b>2,134,876</b>	<b>1,878,751</b>	<b>1,630,529</b>	<b>2,007,355</b>	<b>2,246,921</b>

Maximum Annual Debt Service on Series 2007 & 2013 W&S Bonds	<u>1,073,770</u>	<u>1,073,770</u>	<u>1,073,770</u>	<u>1,073,770</u>	<u>1,073,770</u>
Pro Forma Debt Service Coverage Ratio	1.99 x	1.75 x	1.52 x	1.87 x	2.09 x

Maximum Annual Debt Service on W&S Bonds & GEFA Loan	<u>1,104,082</u>	<u>1,104,082</u>	<u>1,104,082</u>	<u>1,104,082</u>	<u>1,104,082</u>
Pro Forma Debt Service Coverage Ratio	1.93 x	1.70 x	1.48 x	1.82 x	2.04 x

# HISTORICAL AAA MMD RATES (TAX-EXEMPT)

- The graph below shows the range between the record highs and lows of the AAA Municipal Market Data at each maturity since 1993, along with average rates over this time frame and the current rates.
- AAA MMD rates reached their historical low in November 2012. Rates have risen slightly since the record lows reached in late 2012, but still remain well below historical averages.



# ESTIMATED SOURCES & USES OF FUNDS

Dated 07/14/2016 | Delivered 07/14/2016

<b>Sources Of Funds</b>	
Par Amount of Bonds	\$9,195,000.00
Reoffering Premium	598,106.00
Transfers from Prior Issue Debt Service Funds	92,645.31
Transfers from Prior Issue Debt Service Reserve Fund	51,000.00
<b>Total Sources</b>	<b>\$9,936,751.31</b>

<b>Uses Of Funds</b>	
Deposit to Escrow for Series 2007	9,532,031.68
Pay-off of GEFA Loan	184,495.80
Total Underwriter's Discount (0.800%)	73,560.00
Bond & Local Counsel	80,916.00
Underwriter's Counsel	25,000.00
Paying Agent	1,000.00
Escrow Agent	1,000.00
Escrow Verification Agent	2,500.00
Rating Agency Fee	20,000.00
POS/Official Statement	2,800.00
DTC & CUSIP	1,500.00
Auditor	5,600.00
Engineer	2,850.00
*Contingency	3,497.83
<b>Total Uses</b>	<b>\$9,936,751.31</b>

\*Any excess cost of issuance will remain with the City.

## ESCROW INFORMATION FOR SERIES 2007 (AS OF 4-26-16)

<u>Date</u>	<u>Disbursements</u>
10/01/2016	185,290.63
04/01/2017	185,290.63
10/01/2017	9,230,290.63
<b>Total</b>	<b>\$9,600,871.89</b>

The escrow will pay the callable portion of the Series 2007 interest and principal shown above.

Escrow Requirement	\$ 9,600,871.89
<u>Interest Earnings in Escrow</u>	- \$ 68,840.21 (@ 0.61%)
Deposit to the Escrow	\$ 9,532,031.68

(There are open market securities that could potentially earn more.)

Projected Earnings	\$ 68,840.21 (@ 0.61%)
<u>Maximum Earnings Allowed</u>	- \$ 296,591.75 (@ 2.67%)
"Negative Arbitrage"	(\$ 227,751.54)

## ESTIMATED SERIES 2016 REFUNDING

Date	Principal	Coupon	Interest	Total P+I
10/01/2016	-	-	66,241.39	66,241.39
10/01/2017	45,000.00	3.000%	309,700.00	354,700.00
10/01/2018	105,000.00	3.000%	308,350.00	413,350.00
10/01/2019	95,000.00	3.000%	305,200.00	400,200.00
10/01/2020	100,000.00	3.000%	302,350.00	402,350.00
10/01/2021	105,000.00	3.000%	299,350.00	404,350.00
10/01/2022	110,000.00	3.000%	296,200.00	406,200.00
10/01/2023	110,000.00	3.000%	292,900.00	402,900.00
10/01/2024	730,000.00	3.000%	289,600.00	1,019,600.00
10/01/2025	750,000.00	3.000%	267,700.00	1,017,700.00
10/01/2026	775,000.00	3.000%	245,200.00	1,020,200.00
10/01/2027	800,000.00	4.000%	221,950.00	1,021,950.00
10/01/2028	830,000.00	4.000%	189,950.00	1,019,950.00
10/01/2029	860,000.00	4.000%	156,750.00	1,016,750.00
10/01/2030	895,000.00	4.000%	122,350.00	1,017,350.00
10/01/2031	935,000.00	3.000%	86,550.00	1,021,550.00
10/01/2032	960,000.00	3.000%	58,500.00	1,018,500.00
10/01/2033	990,000.00	3.000%	29,700.00	1,019,700.00
<b>Total</b>	<b>\$9,195,000.00</b>	<b>-</b>	<b>\$3,848,541.39</b>	<b>\$13,043,541.39</b>

Average Life	12.386 Years
Average Coupon	3.38%
Bond Yield for Arbitrage Purposes	2.67%

"A" rating assumed.

# SAVINGS ESTIMATES

Date	Estimated Series 2016	non-callable Series 2007	Estimated Combined	Actual Series 2007	Estimated Annual Savings
10/01/2016	66,241.39	56,980.00	123,221.39	255,493.63	132,272.24
10/01/2017	354,700.00	56,980.00	411,680.00	480,453.24	68,773.24
10/01/2018	413,350.00	-	413,350.00	483,473.22	70,123.22
10/01/2019	400,200.00	-	400,200.00	486,133.24	85,933.24
10/01/2020	402,350.00	-	402,350.00	457,152.25	54,802.25
10/01/2021	404,350.00	-	404,350.00	438,171.26	33,821.26
10/01/2022	406,200.00	-	406,200.00	435,246.26	29,046.26
10/01/2023	402,900.00	-	402,900.00	437,321.26	34,421.26
10/01/2024	1,019,600.00	-	1,019,600.00	1,069,201.26	49,601.26
10/01/2025	1,017,700.00	-	1,017,700.00	1,070,601.26	52,901.26
10/01/2026	1,020,200.00	-	1,020,200.00	1,070,801.26	50,601.26
10/01/2027	1,021,950.00	-	1,021,950.00	1,069,801.26	47,851.26
10/01/2028	1,019,950.00	-	1,019,950.00	1,072,601.26	52,651.26
10/01/2029	1,016,750.00	-	1,016,750.00	1,072,951.26	56,201.26
10/01/2030	1,017,350.00	-	1,017,350.00	1,071,857.50	54,507.50
10/01/2031	1,021,550.00	-	1,021,550.00	1,069,320.00	47,770.00
10/01/2032	1,018,500.00	-	1,018,500.00	1,069,630.00	51,130.00
10/01/2033	1,019,700.00	-	1,019,700.00	1,073,260.00	53,560.00
<b>Total</b>	<b>\$13,043,541.39</b>	<b>\$113,960.00</b>	<b>\$13,157,501.39</b>	<b>\$14,183,469.42</b>	<b>\$1,025,968.03</b>

Present Value of Savings (Discounted at AIC) 834,023.87

Transfers from Prior Issue Debt Service Fund	(92,645.31)
Transfers from Prior Issue Debt Service Fund	(51,000.00)
<b>Net Present Value Benefit</b>	<b>\$690,378.56</b>

<b>Net PV Benefit / \$9,229,227 Refunded Principal</b>	<b>7.48%</b>
Net PV Benefit / \$9,195,000 Refunding Principal	7.51%

Refunding Dated & Delivery Date 7/14/2016

Savings by Series  
 Series 2007: \$ 682,611  
 GEFA: 7,768

# DISCLAIMER

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The analysis or information presented herein is based upon hypothetical projections and/or past performance that have certain limitations. No representation is made that it is accurate or complete or that any results indicated will be achieved. In no way is past performance indicative of future results. Changes to any prices, levels, or assumptions contained herein may have a material impact on results. Any estimates or assumptions contained herein represent our best judgment as of the date indicated and are subject to change without notice. Examples are merely representative and are not meant to be all-inclusive.

Raymond James shall have no liability, contingent or otherwise, to the recipient hereof or to any third party, or any responsibility whatsoever, for the accuracy, correctness, timeliness, reliability or completeness of the data or formulae provided herein or for the performance of or any other aspect of the materials, structures and strategies presented herein. This Presentation is provided to you for the purpose of your consideration of the engagement of Raymond James as an underwriter and not as your financial advisor or Municipal Advisor (as defined in Section 15B of the Exchange Act of 1934, as amended), and we expressly disclaim any intention to act as your fiduciary in connection with the subject matter of this Presentation. The information provided is not intended to be and should not be construed as a recommendation or "advice" within the meaning of Section 15B of the above-referenced Act. Any portion of this Presentation which provides information on municipal financial products or the issuance of municipal securities is only given to provide you with factual information or to demonstrate our experience with respect to municipal markets and products. Municipal Securities Rulemaking Board ("MSRB") Rule G-17 requires that we make the following disclosure to you at the earliest stages of our relationship, as underwriter, with respect to an issue of municipal securities: the underwriter's primary role is to purchase securities with a view to distribution in an arm's-length commercial transaction with the issuer and it has financial and other interests that differ from those of the issuer.

Raymond James does not provide accounting, tax or legal advice; however, you should be aware that any proposed transaction could have accounting, tax, legal or other implications that should be discussed with your advisors and/or legal counsel.

Raymond James and affiliates, and officers, directors and employees thereof, including individuals who may be involved in the preparation or presentation of this material, may from time to time have positions in, and buy or sell, the securities, derivatives (including options) or other financial products of entities mentioned herein. In addition, Raymond James or affiliates thereof may have served as an underwriter or placement agent with respect to a public or private offering of securities by one or more of the entities referenced herein.

This Presentation is not a binding commitment, obligation, or undertaking of Raymond James. No obligation or liability with respect to any issuance or purchase of any Bonds or other securities described herein shall exist, nor shall any representations be deemed made, nor any reliance on any communications regarding the subject matter hereof be reasonable or justified unless and until (1) all necessary Raymond James, rating agency or other third party approvals, as applicable, shall have been obtained, including, without limitation, any required Raymond James senior management and credit committee approvals, (2) all of the terms and conditions of the documents pertaining to the subject transaction are agreed to by the parties thereto as evidenced by the execution and delivery of all such documents by all such parties, and (3) all conditions hereafter established by Raymond James for closing of the transaction have been satisfied in our sole discretion. Until execution and delivery of all such definitive agreements, all parties shall have the absolute right to amend this Presentation and/or terminate all negotiations for any reason without liability therefor.



# **CITY OF PERRY, GEORGIA WATER & SEWERAGE NEW MONEY OPTIONS**

May 2, 2016

**Bill Camp, Managing Director  
3050 Peachtree Road, Suite 702  
Atlanta, Georgia 30305  
404.240.6805  
william.camp@raymondjames.com**

**RAYMOND JAMES**

# PLAN A: GEFA LOAN

Date	Series 2007 (New \$)		Series 2013 (Refunding)		Series 2016 (Refunding)		Est'd GEFA Loan @ 2.03%		Combined P&I		
	Principal	Coupon	Interest	Principal	Coupon	Interest	Principal	Interest			
10/01/2016	55,000.00	3.600%	1,980.00	521,000.00	1.920%	86,496.00			730,717.39		
10/01/2017	55,000.00	3.600%	1,980.00	530,000.00	1.920%	76,492.80	45,000.00	309,700.00	1,018,172.80		
10/01/2018				540,000.00	1.920%	66,316.80	105,000.00	308,350.00	1,019,666.80		
10/01/2019				562,000.00	1.920%	55,948.80	95,000.00	305,200.00	1,352,697.42		
10/01/2020				574,000.00	1.920%	45,158.40	100,000.00	302,350.00	1,356,057.03		
10/01/2021				582,000.00	1.920%	34,137.60	105,000.00	299,350.00	1,355,036.23		
10/01/2022				593,000.00	1.920%	22,963.20	110,000.00	296,200.00	1,356,711.83		
10/01/2023				603,000.00	1.920%	11,577.60	110,000.00	292,900.00	1,352,026.22		
10/01/2024							730,000.00	289,600.00	1,354,148.63		
10/01/2025							750,000.00	267,700.00	1,352,248.62		
10/01/2026							775,000.00	245,200.00	1,354,748.62		
10/01/2027							800,000.00	221,950.00	1,356,498.63		
10/01/2028							830,000.00	189,950.00	1,354,498.62		
10/01/2029							860,000.00	156,750.00	1,351,298.63		
10/01/2030							895,000.00	122,350.00	1,351,898.63		
10/01/2031							935,000.00	86,550.00	1,356,098.62		
10/01/2032							960,000.00	58,500.00	1,353,048.63		
10/01/2033							990,000.00	29,700.00	1,354,248.62		
10/01/2034								31,982.84	334,548.63		
10/01/2035							308,707.87	25,840.75	334,548.62		
10/01/2036							314,974.64	19,573.98	334,548.63		
10/01/2037							321,368.63	13,180.00	334,548.63		
10/01/2038							327,892.41	6,656.22	334,548.63		
<b>Total</b>	<b>\$110,000.00</b>		<b>\$3,960.00</b>	<b>\$4,505,000.00</b>		<b>\$399,091.20</b>	<b>\$9,195,000.00</b>	<b>\$3,848,541.39</b>	<b>\$5,454,545.45</b>	<b>\$1,236,427.06</b>	<b>\$24,752,565.10</b>

**GEFA Loans:** 1. "Junior Lien" to W&S Revenue Bonds &  
 2. No Debt Service Reserve Fund requirement.

## Estimated Pro Forma Coverage Summary:

FYE 6/30/2015 - 1.57x  
 FYE 6/30/2014 - 1.38x  
 FYE 6/30/2013 - 1.20x

# PLAN B: WATER & SEWER REVENUE BONDS

Date	Series 2007 (New \$)		Series 2013 (Refunding)		Series 2016 (Refunding)		Est'd W&S Bonds @ 3.53%		Combined P&I
	Principal	Coupon	Principal	Coupon	Principal	Coupon	Principal	Interest	
10/01/2016	55,000.00	3.600%	521,000.00	1.920%	45,000.00	66,241.39	5,000.00	43,411.42	774,128.81
10/01/2017	55,000.00	3.600%	530,000.00	1.920%	105,000.00	309,700.00	5,000.00	202,962.50	1,226,135.30
10/01/2018			540,000.00	1.920%	95,000.00	308,350.00	5,000.00	202,812.50	1,222,479.30
10/01/2019			562,000.00	1.920%	100,000.00	305,200.00	5,000.00	202,812.50	1,225,961.30
10/01/2020			574,000.00	1.920%	105,000.00	302,350.00	5,000.00	202,662.50	1,224,170.90
10/01/2021			582,000.00	1.920%	110,000.00	299,350.00	5,000.00	202,662.50	1,223,150.10
10/01/2022			593,000.00	1.920%	110,000.00	296,200.00	5,000.00	202,662.50	1,224,825.70
10/01/2023			603,000.00	1.920%	110,000.00	292,900.00	5,000.00	202,662.50	1,225,140.10
10/01/2024					730,000.00	289,600.00	5,000.00	202,512.50	1,227,112.50
10/01/2025					750,000.00	267,700.00	5,000.00	202,362.50	1,225,062.50
10/01/2026					775,000.00	245,200.00	5,000.00	202,212.50	1,227,412.50
10/01/2027					800,000.00	221,950.00	5,000.00	202,062.50	1,224,012.50
10/01/2028					830,000.00	189,950.00	5,000.00	202,062.50	1,227,012.50
10/01/2029					860,000.00	156,750.00	5,000.00	201,862.50	1,223,612.50
10/01/2030					895,000.00	122,350.00	5,000.00	201,662.50	1,224,012.50
10/01/2031					935,000.00	86,500.00	5,000.00	201,462.50	1,223,012.50
10/01/2032					960,000.00	58,500.00	5,000.00	201,462.50	1,224,962.50
10/01/2033					990,000.00	29,700.00	5,000.00	201,312.50	1,226,012.50
10/01/2034							1,025,000.00	201,162.50	1,226,162.50
10/01/2035							1,055,000.00	167,850.00	1,222,850.00
10/01/2036							1,095,000.00	130,925.00	1,225,925.00
10/01/2037							1,135,000.00	92,600.00	1,227,600.00
10/01/2038							1,180,000.00	47,200.00	1,227,200.00
<b>Total</b>	\$110,000.00	-	\$4,505,000.00	\$399,091.20	\$9,195,000.00	\$3,848,541.39	\$5,545,000.00	\$4,121,361.42	\$27,727,954.01

## Estimated Pro Forma Coverage Summary:

- FYE 6/30/2015 - 1.74x
- FYE 6/30/2014 - 1.53x
- FYE 6/30/2013 - 1.33x

- W&S Debt Service Reserve Fund requires additional money when annual P&I is increased.
- W&S Bonds shown are "wrapped" around existing debt (for best coverage possible).

## COMPARISON OF THE 2 NEW MONEY OPTIONS

DATE	GEFA @ 2.03%	vs.	New \$ W&S Bonds @ 3.53%	Difference	PV Factor	Present Value Comparison
10/01/2016	-	-	43,411.42	43,411.42	0.9875360x	42,870.34
10/01/2017	-	-	207,962.50	207,962.50	0.9513643x	199,666.35
10/01/2018	-	-	202,812.50	202,812.50	0.9165175x	187,631.56
10/01/2019	334,548.62		207,812.50	(126,736.12)	0.8829470x	(110,215.03)
10/01/2020	334,548.63		202,662.50	(131,886.13)	0.8506062x	(110,559.89)
10/01/2021	334,548.63		202,662.50	(131,886.13)	0.8194500x	(106,510.26)
10/01/2022	334,548.63		202,662.50	(131,886.13)	0.7894350x	(102,608.98)
10/01/2023	334,548.62		207,662.50	(126,886.12)	0.7605193x	(95,047.98)
10/01/2024	334,548.63		207,512.50	(127,036.13)	0.7326628x	(91,677.48)
10/01/2025	334,548.62		207,362.50	(127,186.12)	0.7058267x	(88,426.36)
10/01/2026	334,548.62		207,212.50	(127,336.12)	0.6799735x	(85,290.41)
10/01/2027	334,548.63		202,062.50	(132,486.13)	0.6550672x	(85,540.90)
10/01/2028	334,548.62		207,062.50	(127,486.12)	0.6310733x	(79,252.32)
10/01/2029	334,548.63		206,862.50	(127,686.13)	0.6079581x	(76,472.19)
10/01/2030	334,548.63		206,662.50	(127,886.13)	0.5856897x	(73,789.38)
10/01/2031	334,548.62		201,462.50	(133,086.12)	0.5642369x	(74,021.70)
10/01/2032	334,548.63		206,462.50	(128,086.13)	0.5435699x	(68,592.57)
10/01/2033	334,548.62		206,312.50	(128,236.12)	0.5236599x	(66,159.43)
10/01/2034	334,548.63		1,226,162.50	891,613.87	0.5044791x	450,756.18
10/01/2035	334,548.62		1,222,850.00	888,301.38	0.4860009x	432,483.44
10/01/2036	334,548.62		1,225,925.00	891,376.38	0.4681995x	417,919.25
10/01/2037	334,548.63		1,227,600.00	893,051.37	0.4510502x	403,204.32
10/01/2038	334,548.63		1,227,200.00	892,651.37	0.4345290x	388,076.07
<b>Total</b>	<b>\$6,690,972.51</b>		<b>\$9,666,361.42</b>	<b>\$2,975,388.91</b>	-	<b>\$1,208,442.63</b>

GEFA is less expensive.

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**Where Georgia comes together.**

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*Perry Brand Community Rally*

*Tuesday, May 3, 2016*

*Houston Lake Country Club*

*~ Agenda ~*

**Welcome ~ Mayor James E. Faircloth, Jr., City of Perry**

**Invocation ~ Rev. Roland E. Fall, Perry United Methodist Church**

**Lunch Is Served**

**Keynote ~ Steve Chandler, ChandlerThinks**

**Message from the Branding Committee ~ Gary Moulliet**



**Where Georgia comes together.**

Department of Economic Development

**To:** Mayor and Council

**CC:** Perry Downtown Development Authority  
Lee Gilmour, City Manager  
Annie Warren, City Clerk  
Catherine Edgemon, Main Street Coordinator  
Christine Sewell, Administrative Support

**From:** Robert D. Smith, Economic Development Director

**Date:** April 28, 2016

**Re:** Perry Downtown Development Plan

The Perry Downtown Development Authority (DDA) has been working since December 2015 on the Perry Downtown Development Plan. The Plan formalizes and codifies the vision and goals of the DDA and works towards creating a more vibrant, sustainable, and livable Downtown area, including the General Courtney Hodges Boulevard corridor. This document will guide DDA activities in the coming years with the following general goals:

1. Keep Downtown Perry authentic and full of character through historic preservation, adaptive reuse, creative place making, and high-quality construction.
2. Ensure Downtown Perry remains a clean, safe, and hospitable place to live, work, and play.
3. Encourage the development of vacant, undeveloped, and underdeveloped sites.
4. Work to create a vibrant, sustainable commercial environment within the area that includes a healthy mix of local and destination retail, restaurants, and services.
5. Promote the development of Downtown housing options.
6. Enhance existing public spaces within the area and create new public spaces to reflect growing demand and changing uses.
7. Develop a complete, comprehensive pedestrian network that is well lit, fully accessible, generously sized, and visually attractive to make accessing the area and moving throughout the area as safe, inviting, and convenient as possible.
8. Provide on and off-street bicycle facilities and infrastructure with a focus on connectivity within the area and City-wide.
9. Accommodate vehicles within the area through a variety of efficient on and off-street parking facilities.
10. Work with business, property owners, and developers on key private property improvements that will enhance the area.
11. Develop and foster strong relationships with allied public and private organizations and individuals to accelerate implementation of mutually beneficial projects that enhance the aesthetics, livability, and economic viability of the area.

Currently there is little guiding the development of our Downtown area or the activities of the Perry DDA and this Plan will work towards addressing both of these issues. The Perry Downtown Development Plan will serve as an amendment and actionable appendices to the current, though inadequate, Perry Redevelopment Plan that was adopted by the City in 2008. This is required for a number of reasons:

- The current Perry Redevelopment Plan is inadequate and does not provide proper guidance for the healthy development of our Downtown area.
- The City of Perry and Perry DDA benefits in being able to utilize Urban Redevelopment powers as provided for by Georgia law (O.C.G.A 36-61-1) in implementing this plan. The City already has in place an Urban Redevelopment Plan and can only have one Urban Redevelopment Plan at a time. In developing and adopting the Downtown Development Plan as an amendment and actionable appendix to the current Redevelopment Plan, the City and DDA can avoid this conflict and take advantage of Urban Redevelopment powers.
- The abandonment of or significant changes to the current Urban Redevelopment Plan could jeopardize our Opportunity Zone status.

The Perry DDA has jurisdiction within the Perry Downtown Development District. As you are aware we are moving towards removing the General Courtney Hodges Planning Area from the District. In order for the Perry DDA to be able to operate within the entire Downtown Development Plan Area, it is recommended that you designate the Perry DDA as the City's Urban Redevelopment authority and delegate all "urban redevelopment project powers" to the Perry DDA. This would essentially vest the DDA with dual authority and allow the DDA to operate within the entire Urban Redevelopment Area (within which the Downtown Development Plan Area is wholly located) as was adopted in 2008. Moving forward, the Perry DDA recommends the following course of action:

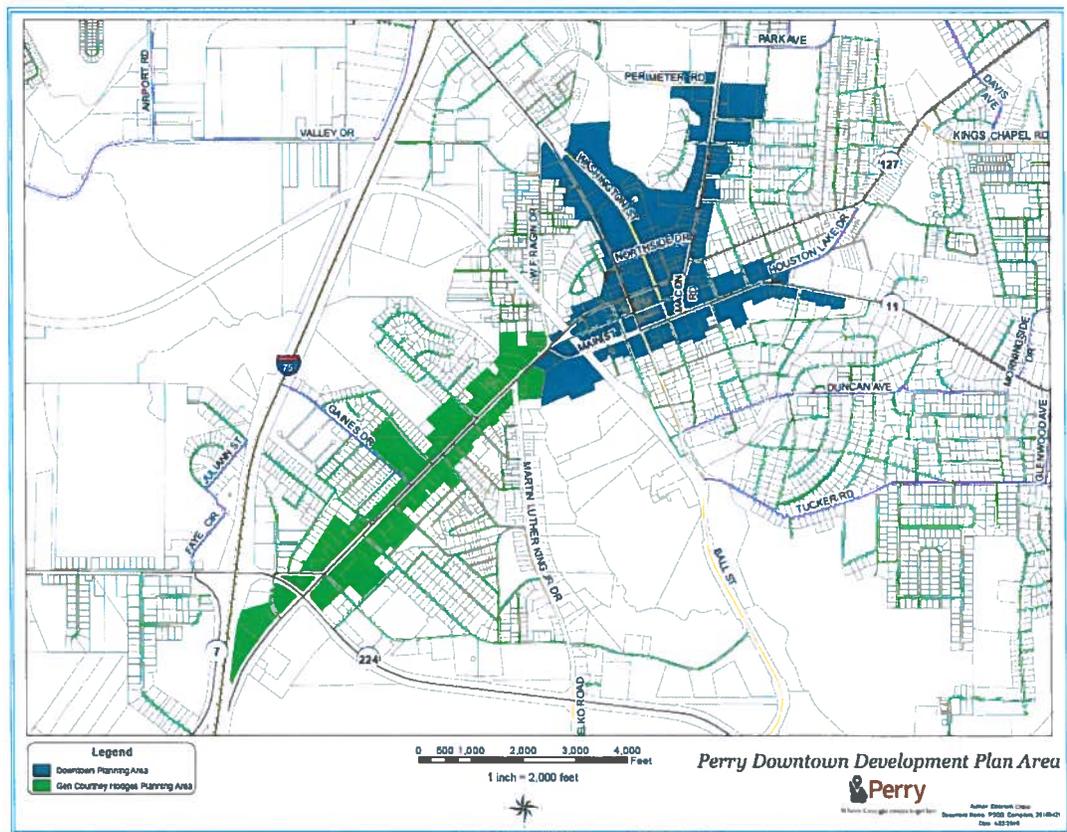
1. Review the draft Plan and allow the required public notice and participation processes to take place.
2. At your June 7 Council Meeting, hold the required public hearing amending the 2008 Perry Redevelopment Plan.
3. At your June 7 Council Meeting, adopt the amended Perry Redevelopment Plan.
4. Adopt a Resolution delegating all urban redevelopment project powers to the Perry DDA and designate the Perry DDA as the City's Urban Redevelopment authority.

On May 11, 2016 the Perry DDA will host two (2) public input sessions regarding the Perry Downtown Development Plan and changes to the current Perry Redevelopment Plan. The first will be between 11:30 a.m. and 12:30 p.m. in the Council Chambers. The second will be between 5:00 p.m. and 6:00 p.m. in the Council Chambers.

The adoption and implementation of the Perry Downtown Development Plan will be a huge step forward for the Perry community. There is currently a lot of momentum Downtown that we need to be able to take advantage of and guide. The Plan also supports and corroborates the Strategic Plan which you have been so diligently administering.

Accompanying this memo is draft copy of the Perry Downtown Development Plan and select Exhibits. If you have any questions or require any further information, please do not hesitate to contact me. I look forward to discussing the Plan with you at your May 2, 2016 Work Session.

# CITY OF PERRY DOWNTOWN DEVELOPMENT PLAN



2016

Perry Downtown Development Authority



Where Georgia comes together.



## **Acknowledgements**

### **City of Perry Mayor and Council**

James E. Faircloth, Jr., Mayor

Randall Walker, Mayor Pro Tempore

Willie King, Councilmember

Robert Jones, Councilmember

William Jackson, Councilmember

Phyllis Bynum-Grace, Councilmember

Riley Hunt, Councilmember

### **City of Perry Downtown Development Authority**

Bryan Fountain, Chairman

Kelly Hillis, Secretary/Treasurer

Tikisha Hayward, Board Member

Carl Lumpkin, Board Member

Brian Burnham, Board Member

Lee Jones, Board Member

Steve Aydelott, Board Member

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## Chairman’s Message

In leading the Perry Downtown Development Plan planning process with my fellow Perry Downtown Development Authority (DDA) Board Members, I believe I can summarize our experience and our hopes for the future with one term. Dynamic. Dynamic was the planning process itself and dynamic is the plan that our community has outlined for the future of Downtown Perry. Such a plan is befitting of our unique, dynamic Downtown and adjacent areas. It was our hope to work closely with the community in implementing this plan so that we can not only enhance Downtown Perry, but the entire Perry community, Houston County, and Middle Georgia.

The Perry Downtown Development Plan captures the excitement of this planning process, grounds it in sound economic and development principles, and outlines the many opportunities that exist for healthy development and redevelopment in Downtown Perry. With a focus on the redevelopment of existing properties, quality public spaces, pedestrian connectivity, and community relationships, this Plan will allow us to bolster our Downtown core while attracting new investment and business to Perry.

I would like to thank my colleagues on the Perry Downtown Development Authority board and the Perry Main Street Advisory Board, as well as Perry Mayor and City Council, for their ongoing support of this Plan. We look forward to continuing our work together as we implement the Perry Downtown Development Plan in our City. Together we will continue to make Perry a great place in which to live, visit, and conduct business.

Sincerely,

Bryan Fountain, Chairman  
Perry Downtown Development Authority





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- A. Maps
- B. Article VIII of the Perry Land Development Ordinance (PLDO)
- C. “Goodroe Site” and Associated Parcels
- D. Alternate Transportation Plan
- E. Implementation Strategy
- F. Form-Based Code Plan and Recommendations
- G. Parcel Database
- H. Jaycees Park Site Plan



## Introduction

Downtown Perry is the heart of the Perry community and has been since its humble, agrarian-centric beginnings in the early 1800's. With its unique shops and restaurants, welcoming public spaces, and varied offices and services, Downtown Perry is a thriving commercial Area that attracts locals and tourists alike. After a period of decline, Downtown Perry is trending upward and a plan is needed to guide and focus this momentum and Downtown's continued health and growth.

Accounted for in the current "Perry Redevelopment Plan" (PRP) (adopted December 2008) and wholly included in the associated "Urban Redevelopment Area" (URA) the Perry Downtown Development Plan Area (or "Area") requires a more focused, specific plan that will facilitate the continued development and redevelopment of the Area and adjacent neighborhoods. For this reason, the City of Perry has developed and adopted this *Perry Downtown Development Plan (PDDP or "Plan")* to serve as an actionable amendment/appendix to the current PRP.

This Plan will bolster the current PRP and articulate the community's vision for the Area and ensure that development and redevelopment projects in the Area reflect this vision and the character and quality desired by the Perry community. The vision detailed in this plan is supported and corroborated by multiple public visioning documents (e.g. *City of Perry, Georgia Strategic Plan and Implementation Program 2014-2024*, *City of Perry Comprehensive Plan*, etc.) and recent public input opportunities.

The primary provisions of this plan utilize the powers of the Perry Downtown Development Authority (DDA) with the support of the Perry Main Street Advisory Board (for which the DDA is the economic restructuring arm) and City of Perry to institute a community-focused development initiative within the current URA and Area. The Perry DDA will look to address barriers to development and redevelopment in the Area and mitigate risks and costs associated with said development. The DDA also hopes to support ongoing efforts by the City and other community partners in the Area in a comprehensive community-building effort.

The primary purpose of Downtown Development Authorities in Georgia is to actively support our communities' downtowns. Since its inception in 1981, Perry's DDA has operated within the Perry Downtown Development District and has focused on downtown development activities, business development programs, civic engagement, and beautification projects. The Perry Downtown Development District is wholly within the Area (mirrors the Downtown Planning Area) and the Perry DDA must be authorized by Resolution of Mayor and Council to operate within the General Courtney Hodges Planning Area as a designated redevelopment entity.

Despite many successes and the current momentum Downtown, there are areas within the Area that do not have viable buildings to preserve or stabilize, lack sufficient business activities, suffer from underdevelopment or blight, lack adequate public facilities or enhancements, and don't have the quality of building stock that can support continued economic stability and growth. Therefore, the focus of Perry Downtown Development Plan is the utilization of the tools



provided under Georgia law to stimulate private investment, development and redevelopment, and public/private partnerships. In using the myriad tools we hope to put in place the types and quality of commercial, residential, and institutional buildings and spaces that the community wants and needs.

## **Vision**

***Downtown Perry is the heart of our community. It is a place where our community, and visitors, comes together for socializing, recreating, shopping, dining, and to do business. Downtown celebrates Perry’s rich history and vibrant future. Nearly 200 years after Perry took root here, Downtown remains the center of a community committed to healthy and sustainable growth, a preservation of our heritage, and a high quality of life.***

## **Goals**

The goals associated with this plan and its implementation are numerous. Generally, this plan works towards the betterment, economically and otherwise, of the Perry Downtown Development Plan Area and the residents, businesses, and visitors who live, work, and play within the Area. The PDDP, administered through the Perry DDA and City of Perry, will:

- Identify available resources and partner with other public and private organizations to identify and obtain additional resources which can contribute to the redevelopment of the Area in accordance with the PRP.
- Provide for consistent and proactive engagement of the Area’s property owners and businesses to initiate redevelopment and the enhancement of their current holdings in the Area to stimulate economic activity and enhanced aesthetics.
- Identify and engage developers, businesses, and investors with an established track record of creating the types of projects and businesses that this Plan has identified as desirable.
- Mitigate risks and costs associated with the development/redevelopment of property within the Area.
- Work within the City and with other public agencies to ensure that the development guidelines and the public process which shape the development activity in the Area apply standards which result in the character and quality of development that the Perry community expects and desires and which are fair and reasonable to all parties involved.



- Improve, expand access to, and connect the public open space network.
- Enhance walkability and connectivity, both within the Area and to adjacent neighborhoods.

## **The Perry Downtown Development Plan Area**

The Perry Downtown Development Plan Area, the focus area of this plan, is entirely within the established URA and is within the current jurisdiction of the City of Perry. The Perry DDA currently has jurisdiction within the Downtown Development District and Downtown Planning Area, one of the Planning Areas found in the Downtown Development Plan Area.

Within the Area are two (2) distinct planning areas, Downtown and General Courtney Hodges, as adopted by the City of Perry in October 2014. The Perry Downtown Development District mirrors the Downtown Planning Area. In order to provide businesses and property owners within the General Courtney Hodges Planning Area with the same support provided by the DDA to the Downtown businesses the DDA must be authorized to work within the URA as the City's designated redevelopment entity in accordance with O.C.G.A. §36-61-17. The majority of the Area is enveloped by residential neighborhoods. Please see Exhibit A for pertinent maps.

### *Downtown*

The Downtown Planning Area is Perry's central commercial Area with 213 businesses, approximately 33.2% of all the businesses in Perry, and is a prime example of an historic southern downtown with its tree-lined brick sidewalks, shops and eateries, professional offices, churches, and central square containing the former Houston County Courthouse. There are many arterial roadways passing through the Downtown planning area including Highway 41 (Commerce Street) and Highway 341 (Main Street) and a Norfolk-Southern rail line.

### *General Courtney Hodges*

The General Courtney Hodges Planning Area begins where the Downtown Planning Area ends at the confluence of Commerce Street, Carroll Street, W.F. Ragin Drive, and Main Street. This commercial Area is the third-largest in Perry with 52 businesses, or 8.1% of all businesses in Perry. Stretching from Downtown to the Georgia National Fairgrounds and Agricenter (GNFA), General Courtney Hodges Boulevard is ringed by a variety of commercial establishments including a veterinarian office, hotels, restaurants, and service companies.

## **Existing Conditions**

### *General Information*

The City of Perry is a rural community located in Houston County in Middle Georgia immediately off I-75 south of Warner Robins. Perry is the County Seat and has a population of



14,714<sup>1</sup> with 5,627 total housing units. Immediately adjacent to the Area are many of these housing units located in Creekwood and Sand Hill, historic, predominantly African-American neighborhoods and in the historic in-town neighborhoods south of Main Street and north of Swift Street. The population is 55.4% white, 40.1% black, and 3.3% hispanic.

The table on the next page provides an overview of the demographics of the Area with a comparison to the City of Perry as a whole.

<b>Perry Downtown Development Plan Area and City of Perry Select Data Comparisons*</b>		
	<b>Area</b>	<b>City of Perry</b>
<b>Population</b>		
2000 Population	284	11,060
2010 Population	263	13,839
2015 Population	265	14,903
2020 Population	273	15,889
2000-2010 Annual Rate	-0.8%	2.3%
2010-2015 Annual Rate	0.1%	1.4%
2015-2020 Annual Rate	0.6%	1.3%
2015 Male Population	44.9%	48.0%
2015 Female Population	54.7%	52.0%
2015 Median Age	38.4	37.5
<b>Race and Ethnicity</b>		
2015 White Alone	32.5%	59.3%
2015 Black Alone	63.8%	35.6%
2015 American Indian/Alaska Native Alone	0.4%	0.2%
2015 Asian Alone	1.1%	2.0%
2015 Pacific Islander Alone	0.0%	0.0%
2015 Other Race	1.1%	1.0%
2015 Two or More Races	1.1%	1.9%
2015 Hispanic Origin (Any Race)	2.6%	3.3%
<b>Median Household Income</b>		
2015 Median Household Income	\$21,159	\$45,944
2020 Median Household Income	\$23,443	\$54,285
2015-2020 Annual Rate	2.1%	3.4%
<b>Average Household Income</b>		
2015 Average Household Income	\$32,210	\$58,424
2020 Average Household Income	\$35,545	\$66,217
2015-2020 Annual Rate	2.0%	2.5%
<b>Per Capita Income</b>		
2015 Per Capita Income	\$13,195	\$23,375
2020 Per Capita Income	\$14,760	\$26,567
2015-2020 Annual Rate	2.3%	2.6%

\* Source: U.S. Census Bureau, 2010 Census; ESRI Estimates

<sup>1</sup> U.S. Census Bureau ACS 5-Year Estimates



### *Land Use, Zoning, & Overlays*

Existing and future land use categories and the associated zoning classifications for the Area and planning areas show that zoning is currently in place that reflects the desired development patterns of the community; however, there are other existing conditions as documented that are deterring development. Both the Downtown and General Courtney Hodges planning areas are in the established Historic Area and as such both are subject to design review, though to varying degrees, by the Perry Main Street Design Committee, a committee of the Perry Main Street Advisory Board. Both planning areas are subject to the tenets of the Perry Land Development Ordinance (PLDO) and currently under consideration by Mayor and Council is the establishment of an Historic Preservation Area.

Provided as Exhibit B is Article VIII of the Perry Land Development Ordinance (PLDO) that provides an overview of land use guidelines for each zoning Area.

### *Parcel Analysis*

There are 339 individual land parcels in the Area and myriad zoning classifications, structures and other improvements, etc. The table below provides an overview of the parcel and zoning environment found Area-wide and also broken down into Planning Areas.

<b>Perry Downtown Development Area Parcel Summary*</b>				
<b>Planning Area</b>	<b>Zoning Code</b>	<b>Parcels</b>	<b>Current Value</b>	<b>Acreage</b>
<b>Downtown</b>	C1	3	\$1,074,100	1.13
	C2	60	\$19,253,201	90.63
	C2/C3	1	\$442,200	1.26
	C2/R1	1	\$49,000	0.85
	C2/R3	1	\$448,300	0.87
	C3	177	\$27,678,766	60.94
	C3/R3	1	\$185,600	2.32
	GU	14	\$18,860,800	53.89
	M2	3	\$349,100	12.55
	R1	5	\$296,600	1.63
	R2	5	\$838,260	2.99
	R3	2	\$271,700	2.51
<b>Downtown Total</b>		<b>273</b>	<b>\$69,747,627</b>	<b>231.57</b>
<b>General Courtney Hodges</b>	C1	7	\$3,738,000	14.96
	C2	54	\$15,882,300	79.4
	C2/R2	1	\$242,900	0.91
	GU	1	\$50,400	3.36
	R3	1	\$7,800	0.49
	R3/C2	2	\$10,100	0.71



<b>General Courtney Hodges Total</b>	<b>66</b>	<b>\$19,931,500</b>	<b>99.83</b>
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<b>Area Total</b>	<b>339</b>	<b>\$89,679,127</b>	<b>331.4</b>
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*\*Houston County Tax Assessors, 2016; 2016 Parcel Assessment*

With 339 parcels, most of those being commercial properties, the Area contains approximately 12% of all commercial property in the City of Perry. However, these same properties account for approximately 24% of the City’s commercial portion of the 2015 tax digest.<sup>2</sup> At 331.4 acres, the Area is approximately .518 square miles, only about 3% of the City’s 16.4 total square miles. Obviously, the Downtown Planning Area is larger and contains significantly more properties than the General Courtney Hodges Planning Area. Approximately 30% of property in the Area is held by non-taxpaying entities such as the City of Perry and various churches.<sup>3</sup>

### ***Publicly Owned Properties***

Within the Area there are multiple publicly owned properties and with proper planning and implementation the potential for the Perry DDA to catalyze redevelopment is very high.

The City of Perry owns a contiguous group of parcels essentially on the border of the Downtown Planning Area and the General Courtney Hodges Planning Area. This approximately 23.40 acre tract of land is the focus of a significant investment by the City of Perry to develop and maintain an active and attractive public space. Currently in the design phase is Goodroe Park, the cornerstone of this initiative. Please see Exhibit C for an overview of this area and associated “Jaycees Park Site Plan”.

### ***Public Infrastructure***

Within the Area is a robust public infrastructure network that includes improved roadways, pedestrian enhancements such as lighting and sidewalks, and the availability of water, sewer, stormwater, and natural gas service throughout. Further, broadband internet service is available throughout the Area as provided by two (2) internet providers, Windstream and ComSouth.

The City is actively implementing the established Alternate Transportation Plan that will provide for pedestrian infrastructure upgrades throughout the City. Much of the Plan falls within the Area boundaries (please see Exhibit D).

### ***Property Inventory***

An inventory was completed on properties within the Area that determined the condition of properties of said properties and if those properties had structures located on them, the condition of those structures. Also, as was possible, the status (vacant or occupied) of the property was determined. The conditions and status of the properties inventoried were determined from public rights-of-way only. No inspection of any premises was conducted as part of this documentation and the determinations that have been made may be inaccurate.

<sup>2</sup> Georgia Department of Revenue, 2015 Tax Digest Consolidated Summary

<sup>3</sup> City of Perry Department of Economic Development



There are numerous instances of property conditions within the Area that were identified and determined to be detrimental to the economic and social well-being of the community. The most significant issue is the existence of vacant, substandard, or dilapidated properties. Such properties are safety liabilities and can be havens for criminal activity. These conditions, many of which have been observed along critical community thoroughfares and at community gateways or abutting residential neighborhoods, have a blighting influence and constitute a liability under present conditions. The presence of substandard or blighted properties, vacant storefronts, “junky” properties, and possible brownfield properties have a lasting negative effect on Perry residents and visitors and impairs the community’s ability to attract and retain residents and businesses and promote private investment in Perry, particularly in the Area. Further, blighted properties tend to depress the property values of adjacent properties which negatively impacts property owners and tax collections.

The tables below provide an overview of the properties located in the Area as determined by the property inventory.

<b>Perry Downtown Development Plan Area Property Status Inventory</b>				
<b>Planning Area</b>	<b>Property Status</b>	<b>Parcels</b>	<b>Current Value</b>	<b>Acreage</b>
<b>Downtown</b>	Blighted	4	\$105,100	1
	Developed	185	\$53,796,990	123.57
	Underdeveloped	48	\$8,349,836	36.63
	Undeveloped	36	\$7,209,801	70.22
<b><i>Downtown Total</i></b>		<b>273</b>	<b>\$69,747,627</b>	<b>231.57</b>
<b>General Courtney Hodges</b>	Blighted	2	\$208,300	2.84
	Developed	42	\$17,658,800	63.92
	Underdeveloped	8	\$1,052,800	13.23
	Undeveloped	14	\$972,300	18.53
<b><i>General Courtney Hodges Total</i></b>		<b>66</b>	<b>\$19,931,500</b>	<b>99.83</b>
<b>Area Total</b>	<b>Blighted</b>	<b>6</b>	<b>\$313,400</b>	<b>3.84</b>
	<b>Developed</b>	<b>227</b>	<b>\$71,455,790</b>	<b>187.49</b>
	<b>Underdeveloped</b>	<b>56</b>	<b>\$9,402,636</b>	<b>49.86</b>
	<b>Undeveloped</b>	<b>50</b>	<b>\$8,182,101</b>	<b>88.75</b>

Each of the properties within the Area was visually assessed and determined to be blighted, developed, underdeveloped, or undeveloped. Generally, the following criteria were utilized in making these determinations:

- Blighted – What exactly defines “blight” or “blighted property” is relatively subjective. For this assessment a property was typically determined blighted if it exhibited significant negative characteristics e.g. excessively junky, unsafe, dilapidated structures,



etc. If a property appears neglected and seems to have a negative impact on adjacent properties it is likely blighted.

- Developed – The property has been reasonably improved with a structure and/or significant other improvements such as a parking lot.
- Underdeveloped – While some development has taken place on the property, it is far from being used for its best or highest use. An example would be a property with only a concrete pad or a property with a disproportionately small structure on it relative to the size of the parcel.
- Undeveloped – Undeveloped properties are typically greenspaces or properties with limited improvements.

The inventory shows, through the number of blighted, underdeveloped, or undeveloped properties, that there are many opportunities for development/redevelopment within the Area. Of particular concern is the existence of six (6) blighted properties within the Area.

<b>Perry Downtown Development Plan Area Structure Inventory</b>				
<b>Planning Area</b>	<b>Structure Condition</b>	<b>Parcels</b>	<b>Current Value</b>	<b>Acreage</b>
<b>Downtown</b>	Dilapidated	5	\$183,100	1.96
	No Structure	75	\$12,743,581	103.84
	Standard	170	\$53,617,246	119.14
	Substandard	23	\$3,203,700	6.63
<b><i>Downtown Total</i></b>		<b>273</b>	<b>\$69,747,627</b>	<b>231.57</b>
<b>General Courtney Hodges</b>	Dilapidated	2	\$176,100	3.62
	No Structure	21	\$1,568,200	32.33
	Standard	29	\$14,825,100	42.76
	Substandard	14	\$3,322,800	19.81
<b><i>General Courtney Hodges Total</i></b>		<b>66</b>	<b>\$19,931,500</b>	<b>99.83</b>
<b>Area Total</b>	<b>Dilapidated</b>	<b>7</b>	<b>\$359,200</b>	<b>5.58</b>
	<b>No Structure</b>	<b>96</b>	<b>\$14,311,781</b>	<b>136.17</b>
	<b>Standard</b>	<b>199</b>	<b>\$68,442,346</b>	<b>161.90</b>
	<b>Substandard</b>	<b>37</b>	<b>\$6,526,500</b>	<b>26.44</b>

Properties within the Area were assessed in determining if they maintained a structure or not and if so, what type of condition the structure was in. Generally, the following criteria were utilized in making these determinations:

- Dilapidated – Much like “blighted” the determination of whether a structure is dilapidated or not is relatively subjective. Generally, dilapidated structures have been neglected to the point where the cost of rehabilitation of the structure would exceed its



value. Unsafe conditions, exposure to the elements, boarded up windows, etc. are all characteristic of dilapidated properties.

- No Structure – No structure located on the property.
- Standard – The parcel contains one or more structures that seem to be in fair shape, generally occupiable, and safe. This was by far the most common type of structure found in the assessment.
- Substandard – While perhaps occupiable, there are elements of neglect associated with substandard properties. This may be vegetation intrusion, a falling in carport or cesspool swimming pool, tarp on the roof, etc.

Six (6) of the seven (7) dilapidated structures are the same properties that were determined to be blighted. Generally, the condition of structures within the Area seems to be fair.

<b>Perry Downtown Development Plan Area Property Occupancy Status*</b>		
<b>Planning Area</b>	<b>Property Status</b>	<b>Parcels</b>
<b>Downtown</b>	Occupied	204
	Vacant	34
<b><i>Downtown Total</i></b>		<b>238</b>
<b>General Courtney Hodges</b>	Occupied	39
	Vacant	21
<b><i>General Courtney Hodges Total</i></b>		<b>60</b>
<b>PDDD Total</b>	Occupied	<b>243</b>
	Vacant	<b>55</b>

\*Unable to determine an occupancy status for every parcel.

Our assessment determined a 23% vacancy rate within the Area, a rate that is higher than the average commercial vacancy rate found statewide and nationally. The implementation of this Plan will work towards reducing the vacancy rate in the Area.

The complete results of this in-depth inventory are available online in an interactive, GIS-based database format complete with parcel information and photos of each property. Follow the link provided below to access the inventory via the web from anywhere at any time:

<http://perry.maps.arcgis.com/apps/webappviewer/index.html?id=e58208b1366643fdb5c6132b274ef028>

### ***Susceptibility to Redevelopment***

Through the parcel analysis and property inventory process we have been able to make a determination as to what properties within the Area are currently “underdeveloped”. This includes both vacant and underutilized properties. The analysis shows that there are a



significant number of properties susceptible to change (less stable, relatively low assessed values, etc.) in the Area.

## SWOT Analysis

In thinking critically about development and redevelopment in the Area the Perry DDA completed a SWOT analysis in order to ascertain strengths, weaknesses, opportunities, and threats relating to the vision and goals outlined in this plan.



Moving forward, how can the Perry DDA address these issues and take advantage of these opportunities? When considering projects within the Area, it will be important to review these mitigating factors for possible impact and to take necessary steps in either leveraging, or minimizing, said impact.

## Redevelopment Need

As is well documented throughout this Plan it is evident that within the Area there is significant need for redevelopment and infill development. Current conditions indicate that:



- The existence of buildings or improvements which by reason of dilapidation, deterioration, age, or obsolescence create the existence of conditions which endanger life or property.
- There is an existence of conditions that are counter to public health, safety, morals, or welfare and may promote the deterioration of said community attributes.
- The presence of faulty lot layout in relation to size, accessibility, or usefulness.
- A substantial number of substandard, blighted, distressed, or underdeveloped properties.

These conditions clearly demonstrate a redevelopment need and not being adequately addressed in the current PRP necessitates the creation of this Plan and appropriate action by the City of Perry and Perry DDA.

## **Action Plan**

### *Integration and Conformance with Other Community Plans*

This section of the Plan provides a workable program for the Perry DDA to implement redevelopment and infill development projects and address issues associated with substandard, blighted, vacant, or underdeveloped properties. As is required with the PRP, the initiatives, goals, and objectives described in this Plan are consistent with the planning goals, community desires, and initiatives outlined in the comprehensive planning process. Further, this plan reflects the community goals and desires outlined in other recent Perry planning documents. The Plan specifically seeks to implement the development goals of the Comprehensive Plan and conform thereto and this Plan will be incorporated into the 2016 comprehensive planning effort and subsequent efforts. This Plan also supports the goals and efforts associated with the *City of Perry, Georgia Strategic Plan and Implementation Program 2014-2024*, the *City of Perry Strategic Masterplan*, the *2016 DDA Work Plan*, and the *City of Perry Alternate Transportation Plan*.

### *Land Use Objectives*

In general, the PDDP sets out the following land use objectives for the Area:

- Strengthen the Downtown core and General Courtney Hodges by adopting zoning designations, policies, and practices that will allow for varied, though quality, development opportunities.
- Bolster the adjacent residential neighborhoods with proximate neighborhood commerce and alternative housing forms, specifically mixing housing densities and types, exploring mixed-use development opportunities, and promoting a healthy mix of housing types.
- Integrate residential and commercial uses when desirable to create livable, sustainable neighborhoods.
- Redevelop blighted and/or underutilized commercial and residential properties.
- Promote infill development in currently underutilized/undeveloped commercial or residential properties.
- Grow the available stock of viable, desirable commercial space in the Area.



- Increase connectivity of the street and sidewalk networks and the connectivity of public spaces and trail network.

### *Demolition or Rehabilitation of Structures*

Through the code enforcement process and the established Blight Tax Ordinance, the City of Perry has the authority to act and declare that the conditions of certain properties, structures and their premises, be addressed.

All properties within the City of Perry and the Area are subject to these code requirements and their enforcement tenets including demolition. Such actions remain under the purview of the exiting municipal processes.

The Perry DDA acknowledges that historic or more modest dwellings are important to the character of the community and often represent the community’s best affordable or workforce housing. The DDA also acknowledges the inherent costs and environmental impacts of demolition.

### *Relocation of Displaced Residents*

The City of Perry does not anticipate pursuing or engaging in any relocation efforts. The primary focus of this Plan and the Perry DDA will be on commercial revitalization and the rehabilitation and/or demolition of vacant and/or dilapidated structures. The DDA may seek a mutually acceptable property exchange to acquire properties and if relocation were to become necessary, the City of Perry and Perry DDA will comply with any and all applicable requirements as outline in the Georgia Relocation Act and Federal Uniform Relocation Act.

### *Acquisition of Property*

The City of Perry and the Perry DDA may pursue the acquisition of property for redevelopment purposes. Further, the City and DDA reserve the right to exercise powers of eminent domain to clear title of a property in order to facilitate its sale or transfer to private interests for redevelopment purposes. No properties requiring such action have been identified at this time and eminent domain will remain an option of last resort in redevelopment initiatives.

### *Public Investment in Support of Redevelopment*

Public infrastructure improvements within the Area remain principally under the auspices of the City of Perry though the Perry DDA can develop public infrastructure if necessary. Currently there are a number of City-driven initiatives underway working towards improving the Area including public space projects, pedestrian infrastructure enhancement projects, etc. The City will retain ownership and maintenance obligations for all public infrastructure. Private developers are required as applicable to develop public infrastructure to meet the needs of their development.



## **Plan to Leverage Available Resources for Redevelopment**

The City of Perry and the Perry DDA have identified multiple resources, public and private, that are available to the community to encourage development and redevelopment in the Area in accordance with the PRP and this Plan. These resources provide Perry with a wide array of tools that, particularly when used in coordination with one another, can be utilized to catalyze and promote healthy development and redevelopment.

The Perry DDA is generally charged with developing and redeveloping the central business area (the Perry Downtown Development District) by undertaking projects to promote trade, commerce, industry, and employment opportunities. Generally, the DDA may work within the below frameworks:

- the acquisition, construction, installation, modification, renovation or rehabilitation of land, interests in land, buildings, structures, facilities or other improvements within the downtown development area;
- the acquisition, installation, modification, renovation, rehabilitation, or furnishing of fixtures, machinery, equipment, furniture or other property of any nature whatsoever used on, in or in connection with any such land, interest in land, building, structure, facility, or other improvement;
- any undertaking authorized as part of a city business improvement Area;
- any undertaking authorized under the Redevelopment Powers Law when the DDA has been designated as a redevelopment agency;
- any undertaking under the Urban Redevelopment Law when the DDA has been designated as an urban redevelopment agency.

As has been discussed, the ability of the DDA to act as a designated redevelopment agency is critical if Mayor and Council move to remove the General Courtney Hodges Planning Area from the Downtown Development District.

### ***City Conferred Funding and/or Land***

The City of Perry has traditionally provided the Perry DDA with budgeted funds per fiscal year. For FY2016 this amount was \$4,900 with a majority of these funds budgeted for “Professional Services”. The City also has the authority to transfer land to the Perry DDA that can be utilized for redevelopment purposes. Generally, the Perry DDA will be able to pursue redevelopment opportunities with funding or land.

### ***Perry Industrial Building Authority***

The City of Perry, by way of Constitutional Amendment in 1962, established the Perry Industrial Building Authority, a Constitutional Development Authority. Though inactive for a number of years, this 5-member Authority holds significant City-wide redevelopment and development powers that could be utilized in partnership with the City or DDA to promote the vision of this plan.



### *Opportunity Zone*

The Area lies entirely within an established Opportunity Zone (OZ) that is in effect until the end of 2018. OZ's are a State of Georgia program designed to encourage redevelopment through the allowance of employment tax incentives for job-creating commercial ventures. Projects in Houston County, being a Tier 3 community, would typically be eligible for a level of employment incentives well below of what is allowed in an OZ. Perry's Opportunity Zone allows for:

- The maximum Job Tax Credit allowed under Georgia law - \$3,500 per job
- The lowest job creation threshold of any job tax credit program – 2 jobs
- Use of Job Tax Credits against 100% of income tax liability and withholding
- Expansion of the definition of “business enterprise” to include all businesses of any nature

### *Enterprise Zone*

The State Enterprise Zone (EZ) Program provides for incentives relating to property taxes, local abatement or reduction of fees and permitting, etc. for geographic areas that are suffering from underdevelopment or decline.

### *Special Tax Area*

Special tax Areas provide an avenue to fund improvements to the Area via enhanced taxation structures applied to properties in the Area. Community Improvement Areas (CID) or Business Improvement Areas (BID) are self-imposed, self-taxing districts in which property owners and businesses agree to levy additional taxes to complete projects they would like to see in the Area. Public infrastructure, services, programs, etc. can all be funded by the collective CID or BID to collectively enhance where they do business.

An effort was made in 2015 to establish a CID in the General Courtney Hodges Planning Area but property owners ultimately decided against it.

### *Historic Preservation Incentives*

Historic properties within the Area that are currently on the National Register of Historic Places, or eligible to be nominated for the Register, could pursue available State and Federal incentive programs for historic properties. These programs provide significant incentives to promote the redevelopment of historically significant properties, revitalize historic areas, create jobs and private investment, and bring enhanced properties back onto the local tax rolls. The three (3) available historic preservation incentive programs are:

- Rehabilitation Investment Tax Credit Program & Charitable Contribution Deduction
- Georgia State Income Tax Credit Program for Rehabilitated Historic Property
- Georgia Preferential Property Tax Assessment Program for Rehabilitated Property

The City of Perry can also provide substantive and comprehensive assistance with the application and administration of said programs and subsequent property work.



## Housing Tax Credits

Multiple state and federal tax credit programs are in place to incentivize developers to build residential properties consistent with the PDDP. These incentives are typically available for senior housing and affordable housing projects in the form of housing credits.

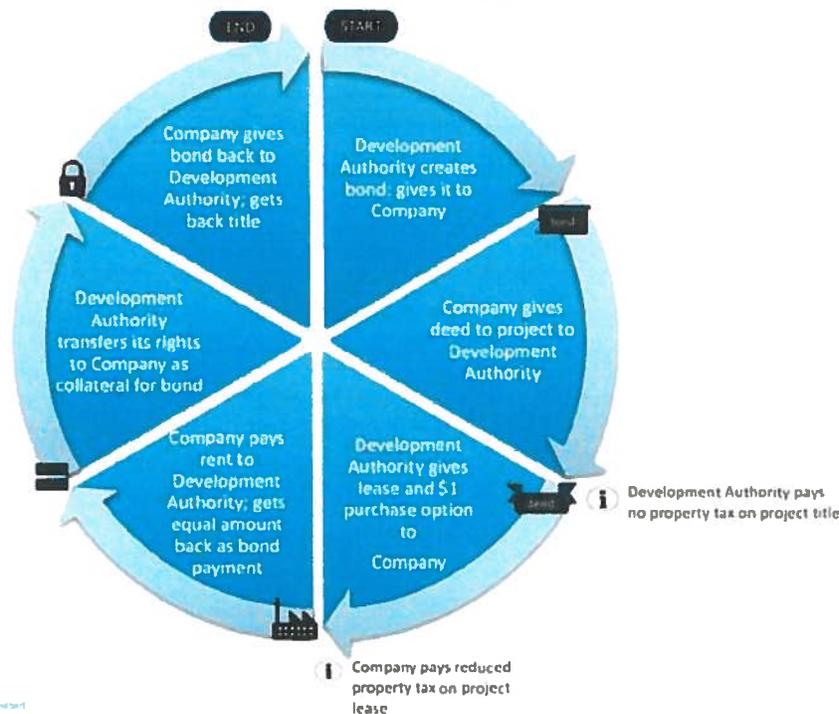
## Revenue Bonds

Revenue bonds, notes or other obligations issued by an authority shall be paid solely from the property (real, personal and revenues) encumbered to secure the bonds or obligations. The DDA board must adopt a resolution authorizing the issuance of the bonds.

DDA bonds must be issued in accordance with the Revenue Bond Law. The bonds are validated by a procedure in which a petition and complaint for validation is filed in the superior court of the county and served upon the Area attorney. The superior court then conducts a validation hearing, of which the public must be notified. The bonds may be sold at public or private sale.

The DDA may also issue notes in anticipation of bonds. Such notes may be issued for the same purposes as the anticipated bonds. No judicial validation is required for the notes to be issued. The issuance of the notes shall not exceed the par value of the anticipated bonds.

## Bonds for Title<sup>4</sup>



<sup>4</sup> Source: Dan McRae, Seyfarth Shaw, 2016



### *Land Assembly*

Among the most significant costs to a private developer when looking to pursue a project is the time, difficulty, and financial costs associated with assembling a large enough parcel to make the development cost effective. It is worth exploring the possibility of taking an active role in this process and acquiring and assembling land and selling it to developers, often times generating revenues for further ventures. Similarly, the DDA could acquire and assemble parcels of land and solicit development proposals, with the land going to the developer with the preferred proposal. Land may be sold at market rates or below appraised value and developers typically agree to provide certain amenities such as public space, parks, recreational facilities, parking, etc. As property owned by the Perry DDA remains tax-exempt, the DDA’s ability to hold the land until ready for development provides a further incentive to developers.

### *City Project Assistance*

The City of Perry offers project assistance for developers and property owners city-wide including in the Area. Assistance typically takes the form of preliminary concept meetings, interpretation of development regulations, accelerated review timetables, etc. A waiver or reduction of fees associated with development in Perry have been afforded and it may be worth looking into consistent, enhanced fee reductions or waivers within the Area.

### *Transfer of Development Rights*

The establishment of a Transfer of Development Rights (TDR) program within the Area could work towards attracting private investment and promoting redevelopment. TDR programs essentially monetize the rights to development and can be utilized to incentivize a greater return on investment for developers while protecting against overdevelopment or development that is not sustainable. Currently, only a few communities in Georgia actively engage in a TDR program.

### *Parking Bank Option*

Properties within the Area are required to provide parking per local regulation. Often times these requirements hinder the development of certain properties, particularly small parcels. Such requirements may also promote disjointed, undesirable parking patterns. There are financial, environmental, and aesthetic benefits associated with congregate parking strategies that promote community while easing restrictions on developers. The Perry DDA can establish and offer the utilization of a parking bank which will allow developers to develop lots to their maximum potential by offsetting parking restrictions with participation in the bank.

### *Openspace Bank Option*

Properties within the Area are required to adhere to certain percentages of lot coverage pertaining to impervious surfaces. Like parking restrictions, these restrictions may render parcels undevelopable. A properly developed openspace bank can be established by the Perry DDA that would allow developers to offset developmental regulations through participation in



the bank. Such a program could still adhere to pertinent landscaping, buffers, storm water measures, etc.

### ***Blight Tax Ordinance***

The City of Perry adopted a Blight Tax Ordinance in 2015. This ordinance is designed to discourage property owners, particularly absentee owners, from maintaining derelict, dangerous properties. Said properties could ultimately be subject to demolition.

### ***Grants and Other Funding Sources***

Various grant and loan programs are available for rehabilitation, redevelopment, and general community development and have, and will continue to be, actively sought for the Area. The Department of Economic Development has developed and submitted an application for funding to the Environmental Protection Agency (EPA) for Brownfield Assessment funds through the Brownfield Assessment Grant program. Three of the identified properties are within the Area.

### ***Public-Private Partnerships***

Private-private partnerships are more and more common and there exist opportunities in Perry for such collaboration. Through such partnerships and leveraging each party or parties are able to lessen their individual financial burden while the likelihood for project success increases. The Perry DDA can enter into formal LLP's or LLC's with other organizations to make development happen.

## **Implementation**

The implementation of the Plan provides an overview of vision for the Area and each of the planning areas. The Perry DDA shall use the tools at their disposal to guide redevelopment and infill development in the Area.

“Catalyst projects” in both the Downtown and General Courtney Hodges planning areas will be identified and completed, leading the way for continued development and redevelopment in the Area. Catalyst projects are public or private projects that are planned and designed to cause a corresponding and complementary development reaction on surrounding properties. They are projects of sufficient magnitude to stimulate redevelopment of underdeveloped properties or major rehabilitation of underutilized buildings. The identification and implementation of catalyst projects provides an opportunity for public and private investments to receive a reasonable return. The measure of return on investment can include jobs creation, increase in land value, improved transportation and access, new housing units, etc.

### ***General Planning Area Goals – Downtown***

The Downtown planning area is an historic, prominent part of the Perry community with a viable commercial base, unique public spaces, and robust vehicular and pedestrian



transportation infrastructure. The redevelopment of existing commercial properties and the development of new commercial properties are the main goal of this planning area.

- Identification and demolition of all blighted structures
- Overall increase in the availability of viable commercial buildings
- Identification and redevelopment of all substandard properties
- Completion of pedestrian enhancements (e.g. lighting, bricked sidewalks, etc.)
- The establishment of mixed-use developments and downtown residential options
- Retention of historic structures and character

### *General Planning Area Goals – General Courtney Hodges*

The General Courtney Hodges planning area is a principal commercial district and community thoroughfare in Perry. Serving as a gateway to and from Downtown Perry and connecting the Perry community with the Georgia National Fairgrounds and Agricenter (GNFA), General Courtney Hodges is a focus of many community redevelopment efforts. The redevelopment of existing commercial properties and the establishment of quality development on currently underdeveloped properties are the principal goals for this planning area.

- Identification and demolition of all blighted structures
- Overall increase in the availability of viable commercial buildings
- Identification and redevelopment of all substandard properties
- The establishment of mixed-use developments
- The redevelopment of all city-owned properties to public spaces or otherwise

### *Area Wide Goals and Actions (items denoted in walnut are Catalyst Projects)*

- 1. Keep Downtown Perry authentic and full of character through historic preservation, adaptive reuse, creative place making, and high-quality construction.**
  - a. Explore frameworks and programs to preserve unique architecture and important historical and cultural assets.*
  - b. Use historic and adaptive reuse strategies to grow Downtown while preserving Downtown’s unique character and identity.*
  - c. Work to promote programs, activities, and development that bolster Perry’s unique sense of place.*
  - d. Develop visioning documents for key sites that correlate with established community goals and work with developers to develop sites in a way that does not compromise said vision or goals.*
  - e. Enhance public art offerings within the Area.*
  
- 2. Ensure the Downtown Development Plan Area remains a clean, safe, and hospitable place to live, work, and play.**
  - a. Work with Downtown property owners and businesses to establish clear, mutually beneficial guidelines for special events that impact Downtown.*





- b. *Work with developers in promoting mixed-used developments with a residential component.*
- c. *Promote live-work opportunities within the Area.*
- d. *Engage the real estate community in determining need and marketing potential properties.*
- e. *Coordinate with the Perry Housing Team as necessary.*
- f. *Explore the possibility of developing an in-town “pocket neighborhood”.*

**6. Enhance existing public spaces within the Area and create new public spaces to reflect growing demand and changing uses.**

- a. *Always consider the development of green space or other type of public space a viable and beneficial option in dealing with undeveloped or underdeveloped properties.*
- b. *Support ongoing public space initiatives.*
- c. *Inventory public spaces within the Area and develop a programming strategy for said spaces.*
- d. *Identify sites for possible acquisition and conversion to pocket parks.*
- e. *Analyze existing public land and rights-of-way for the possible inclusion of public amenities.*
- f. *Develop a strategy and funding plan for land acquisition and capital funding.*
- g. ***Work to support and implement the Form-Based Code and associated recommendations along General Courtney Hodges Boulevard.***

**7. Develop a complete, comprehensive pedestrian network that is well lit, fully accessible, generously sized, and visually attractive to make accessing the Area and moving throughout the Area as safe, inviting, and convenient as possible.**

- a. *Continue the implementation of the Alternate Transportation Network and consider expanding it Area-wide.*
- b. *Improve pedestrian connections to enhance connectivity and focus on trouble spots such as General Courtney Hodges Boulevard.*
- c. *Ensure walkability and connectivity with adjacent neighborhoods.*
- d. *Develop and implement pedestrian-scale wayfinding throughout the Area.*
- e. *Identify and mitigate all “dark spots” within the Area in ensuring it is well-lit, inviting, and safe.*
- f. ***Connecting the General Courtney Hodges and Downtown Planning Areas through a pedestrian-only public space / commercial thoroughfare.***

**8. Provide on and off-street bicycle facilities and infrastructure with a focus on connectivity within the Area and City-wide.**

- a. *Identify needs within the Area for bicycle facilities and infrastructure and pursue targeted projects designed to satisfy those needs.*
- b. *Explore the possibility of creating dedicated bike lanes on Area roadways.*
- c. *Install bike bollards as necessary throughout the Area.*



**9. Accommodate vehicles within the Area through a variety of efficient on and off-street parking facilities.**

- a. *Explore the development and implementation of low-impact development strategies within the Downtown area.*
- b. *Identify and develop additional parking facilities as needed.*
- c. *Explore current parking policies and study their efficacy and equitability.*

**10. Work with business, property owners, and developers on key private property improvements that will enhance the Area.**

- a. *Encourage, and when possible provide resources to, property owners in within the Area who wish to improve their facades, landscaping, etc.*

**11. Develop and foster strong relationships with allied public and private organizations and individuals to accelerate implementation of mutually beneficial projects that enhance the aesthetics, livability, and economic viability of the Area.**

These Goals and Actions are further codified in Exhibit E, Implementation Strategy. The Perry DDA, at their April 12, 2016 work session determined the following projects to be top-priorities moving forward:

1. Procurement and redevelopment of the Jaycees property.
2. The acquisition and redevelopment, or other mitigation efforts, of blighted property.
3. The acquisition and improvement of Downtown alley ways.

Each of these priorities coincides with the goals of this plan and is represented in the above Area Wide Goals and Actions.

## **Catalyst Projects**

The Perry Downtown Development Plan has established a vision and accompanying goals for the Downtown Development Plan Area. In working towards implementation of this vision it is important to illustrate how these varying goals and the action items and resources geared towards achieving these goals blend to create a built environment in the Area that adheres to our vision for Downtown Perry.

Catalyst projects have been identified in each of the planning areas that will carry forward this vision, inspire new development, and build critical mass and redevelopment momentum. These projects are located in strategic locations within the Area and will show how public and private interventions can have a transformative impact on not only the Area but the entire City of Perry. Given the timeframe, it would also be possible to connect these projects to some sort of Bicentennial legacy project.

*Gateway Center: A mixed-use destination development at one of our most critical intersections.*

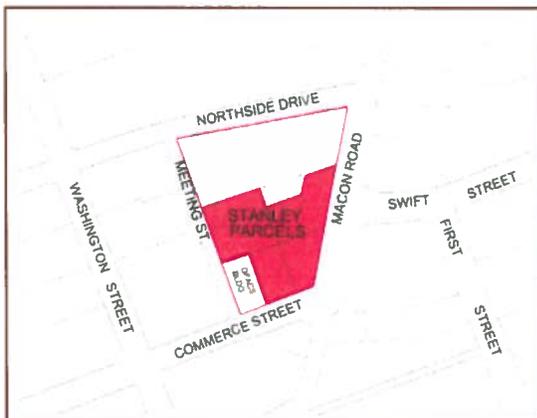


Currently known as the “Stanley Property” the proposed development sits at the intersection of Swift Street and Highway 41 at one of Perry’s most significant Downtown gateways and community thoroughfares. Mostly vacant with multiple acres, the proposed site represents one of the few locations in the Area where a project of such magnitude could take place. With ground-level commercial and second-story living spaces, the project could have an immediate, significant impact in Perry in working to satisfy demand in multiple markets including retail, restaurants, and downtown living options.

There have been numerous efforts at redeveloping this site in the past that have not come to fruition. Formerly a furniture store and laundromat, there are concerns regarding the integrity of the current structure and/or environmental issues associated with the laundromat use. Most site plans have called for the demolition of existing structures and the development of a mixed use site.



<b>“Stanley Property” Parcel Analysis</b>			
	<b>Owner</b>	<b>Value</b>	<b>Acreage</b>
P2-87	Perry A. Stanley	\$83,900	0.17
P2-14	Perry A. Stanley	\$21,600	0.21
P2-11	RE Stanley Furniture & Appliance Co.	\$213,500	0.33
P2-15	Ronald E. Stanley	\$78,600	0.31
P2-16	Ronald E. Stanley	\$159,900	0.21
P2-17	Perry A. Stanley	\$72,800	0.24
P2-10	Ronald E. Stanley	\$39,000	0.33
<b>TOTAL</b>	<b>All Properties</b>	<b>\$669,300</b>	<b>1.80</b>



*Stanley Property  
 Parcels*



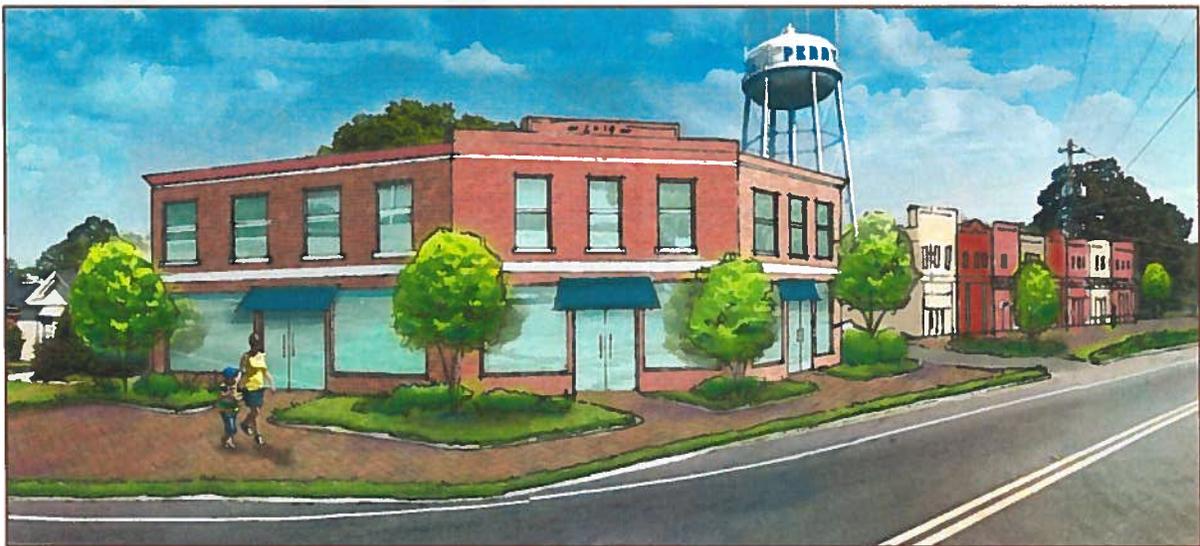


Working closely with Mr. Stanley, the Perry DDA could work to address some of the uncertainties surrounding the property, address some costs associated with visioning for the property, and proactively engage developers.

Some previous visions for the property are shown on the following page.



*Above: An overhead of a possible redevelopment concept at the Stanley Property.*





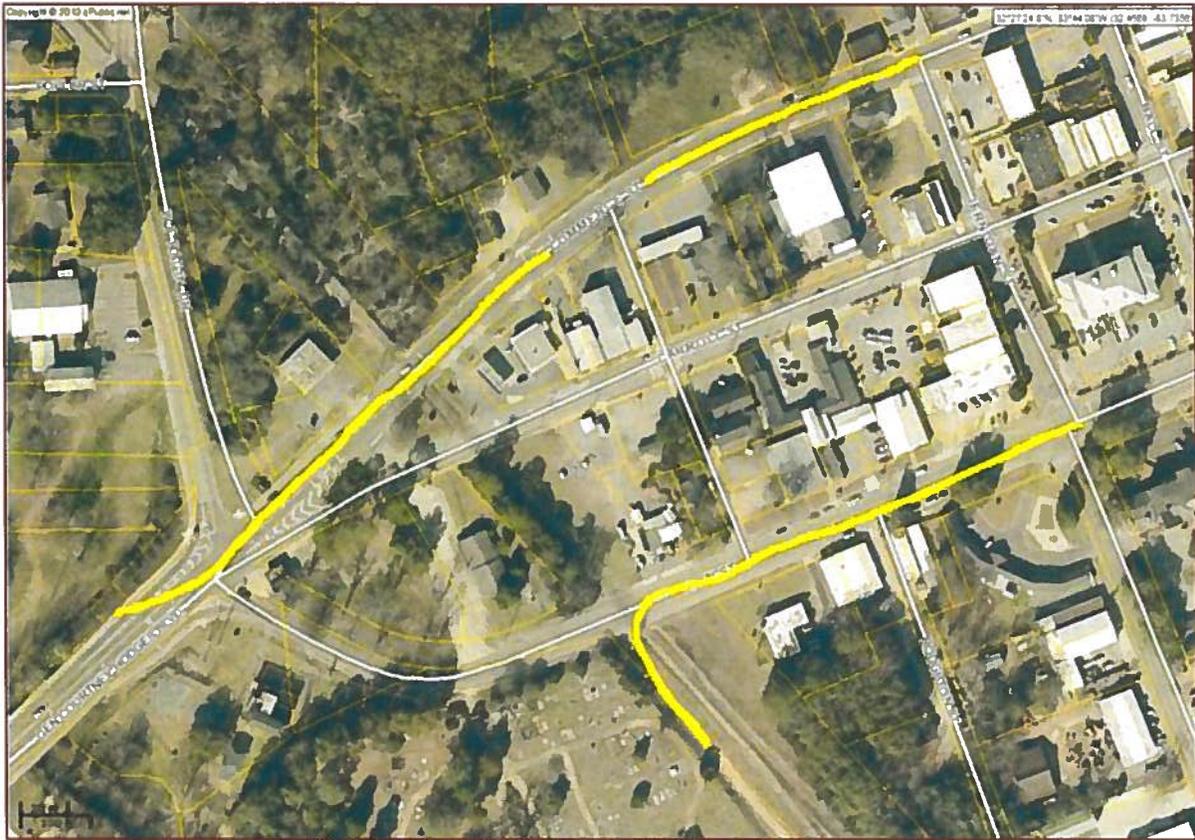
*Bottom of Previous Page: A rendering of a possible redevelopment concept at the Stanley Property.*

*Unifying Pedestrian-Oriented Thoroughfare: Connecting the General Courtney Hodges and Downtown Planning Areas through a pedestrian-only public space / commercial thoroughfare.*

Given the current ongoing focus of the City of Perry to redevelop recently-acquired parcels of underdeveloped land (please see Exhibit B) at the confluence of Commerce Street, Carrol Street, Main Street, WF Ragan Drive, and General Courtney Hodges Boulevard, there exists not only momentum, but a distinct need, to create a walkable and inviting path between said parcels and the General Courtney Hodges Boulevard Planning Area and the Downtown Perry core and Downtown Planning Area. A seamless, vibrant corridor of public and commercial spaces would be truly transformative and excellent civic spaces are often times the center of community activity and vitality.

Downtown Perry is the commercial heart of the City but much of it is, particularly at the southern end, underdeveloped and a lack of public infrastructure improvements have led to challenges regarding desirability, both from a private investment standpoint and a public realm standpoint. The transformation of this space will energize surrounding properties and create diverse opportunities to connect and traverse the City.

Acquire and convert vacant, undeveloped, and underdeveloped properties between Rotary Centennial Park and Jernigan Street into public spaces and accommodate as best as possible public amenities and infrastructure improvements.



*Above: General project area defined by Main Street, Commerce Street, and Jernigan Street*



*Left: Looking North down Carroll Street.*



*Left: Looking North down Main Street.*

### ***Former Jaycees Building Redevelopment Project***

The City of Perry currently owns and maintains the former Jaycees property at 710 Carroll Street. The property has a structure on it and is generally located at the confluence of Commerce Street, Carroll Street, and Main Street. Approximately 0.68 acres, the property is immediately adjacent to the Goodroe Property currently being developed into an enhanced public space by the City of Perry. Abutting a railroad right-of-way, the property is in the center of the above-discussed pedestrian thoroughfare project and represents an excellent redevelopment opportunity.



*Left: The front of the former Jaycee's building currently owned by the City of Perry.*



*Right: The rear of the former Jaycee’s building.*



*Left: The parking lot area of the former Jaycee’s building.*

Currently, the City of Perry has no plans for this property. Perry DDA could work with Perry Mayor and Council in obtaining ownership of the property and pursuing its redevelopment as a viable commercial or mixed-use property. There is also interest from the DDA to explore a possible public space improvement. Regardless of the use, Perry DDA wants to ensure that it is compatible and complementary to the Jaycees Park project.

It is recommended that the Perry DDA, if made owners of the property, work with professional engineers and/or architects in creating a model development or vision, and market said vision to



private developers. Upon inspection of the structure on the property by staff it was determined that the existing structure is limited in viability as a commercial facility. However, there may be redevelopment potential. DDA would like to explore multiple scenarios involving the redevelopment of the property with and without the existing structure.

### ***General Courtney Hodges Connectivity***

With the impending Form-Based Code amendment to the City of Perry’s PLDO comes numerous opportunities to promote development, redevelopment, and economic growth in the Area along the General Courtney Hodges Boulevard Corridor. Among these opportunities is the development of transportation infrastructure improvements and the development or enhancement of public spaces.

Projects recommended by the proposed form-based code include:

1. The creation of multiple “roundabouts” along General Courtney Hodges Boulevard to provide traffic calming, create a more pedestrian-friendly corridor, and enhance the aesthetics of the area.
2. The creation of two (2) new streets that will allow for greater connectivity within neighborhoods and across General Courtney Hodges Boulevard.
3. The acquisition of land to create a more visible, public entrance to Creekwood Park.
4. The acquisition of land to create a new public park.

An overview of these recommendations can be found as Exhibit F.

### **Development Management Approach**

The City of Perry DDA will take an active and leading role in the redevelopment of the Area. As the City’s Downtown Development Authority the Perry DDA will:

- Coordinate and implement the Perry Downtown Development Plan by working with property owners, developers, City of Perry Departments, community partners and organizations, etc.
- Complete standard predevelopment activities including but not limited to:
  - Site analyses
  - Environmental studies
  - Development planning
  - Market Analyses
  - Zoning compliance
  - Facilities inspections
- Solicit appropriate development projects.
- Obtain financing through traditional and non-traditional avenues.
- Market and promote the Area.
- Coordinate the planning and implementation of infrastructure and public space improvement projects.
- Enter into negotiations with private entities, property owners, developers, etc. within the Area for the purposes of acquiring land and property for redevelopment purposes.



- Prepare appropriate analyses, feasibility studies, assessments, etc. in support of redevelopment projects.
- Enter into negotiations with qualified vendors for the provision of professional services.
- Pursue all appropriate and legal avenues for redevelopment in the Area.

There will be an increase in the Perry DDA's operating costs associated with this development management approach.

## **Funding**

There are multiple cost considerations associated with funding the increased DDA activities associated with the implementation of this Plan. DDA may request an increase in annual budget allocation through the City, may impose a variety of user fees such as design review and/or permit fees, or may charge development management fees to projects for which they play a role.

### *Increase Budget Allocation*

Through an increase in annual budget allocation, it is assumed that the DDA's activities will have a significant, positive impact on the tax digest and the increase tax revenues will offset the costs associated with implementation of this Plan. Development and redevelopment projects almost always have a positive fiscal impact. Any budget allocation is fully at the discretion of the Perry Mayor and Council.

### *Imposition of User Fees*

User fees could become the funding source of DDA project implementation costs. However, the DDA feels that increased fees associated with development in the Area would run counter to the goals of promoting redevelopment and development in the Area.

### *Development Management Fee*

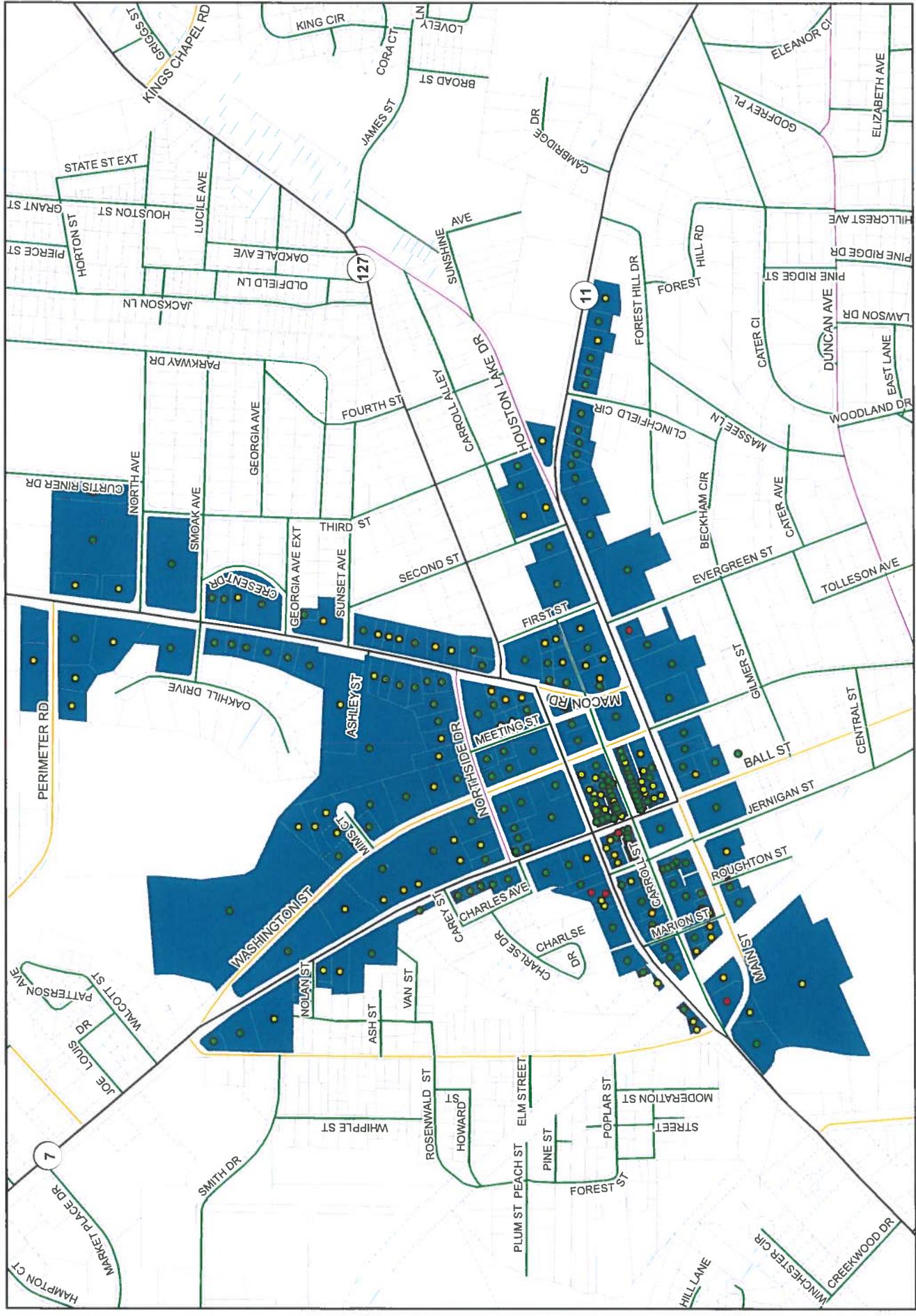
Plan implementation costs could be funded through a development management fee charged to projects based on the project's scope and calculated as a percentage of the project cost. Similar fees typically range from 2% to 6%, similar to other professional fees associated with development. As an example, a 2% development fee on a \$350,000 project would result in a \$7,000 Development Management Fee that could be utilized for costs associated with the project or other projects. Activities could be initiated at any time during the life of the project, temporary funding provided through the General Fund or other funding sources, then reimbursing itself as project financing is put into place.

Ultimately, the Perry DDA would be most able to implement this Plan with a long-term, guaranteed funding stream. Said funding stream would alleviate concerns from financing organizations regarding the Authority's ability to fund debt service while allowing the DDA to plan ahead and develop detailed annual budgets.



## **Conclusion**

The City of Perry has a dynamic, unique, and healthy asset in Downtown. However, Downtown can be improved and efforts can be made to enhance the continued viability of properties and business in the Area. There are glaring issues within the Downtown Development Plan Area that must be addressed and thus far the private sector has largely failed to address these issues because of uncertainties and costs that make investments too risky. Therefore, the public sector, led by the Perry DDA, must work within the framework of their authority and powers in assisting the private sector. This Plan provides a sound roadmap for said assistance and if implemented will enhance not only the Area but the entire City of Perry.



# Perry Downtown Planning Area



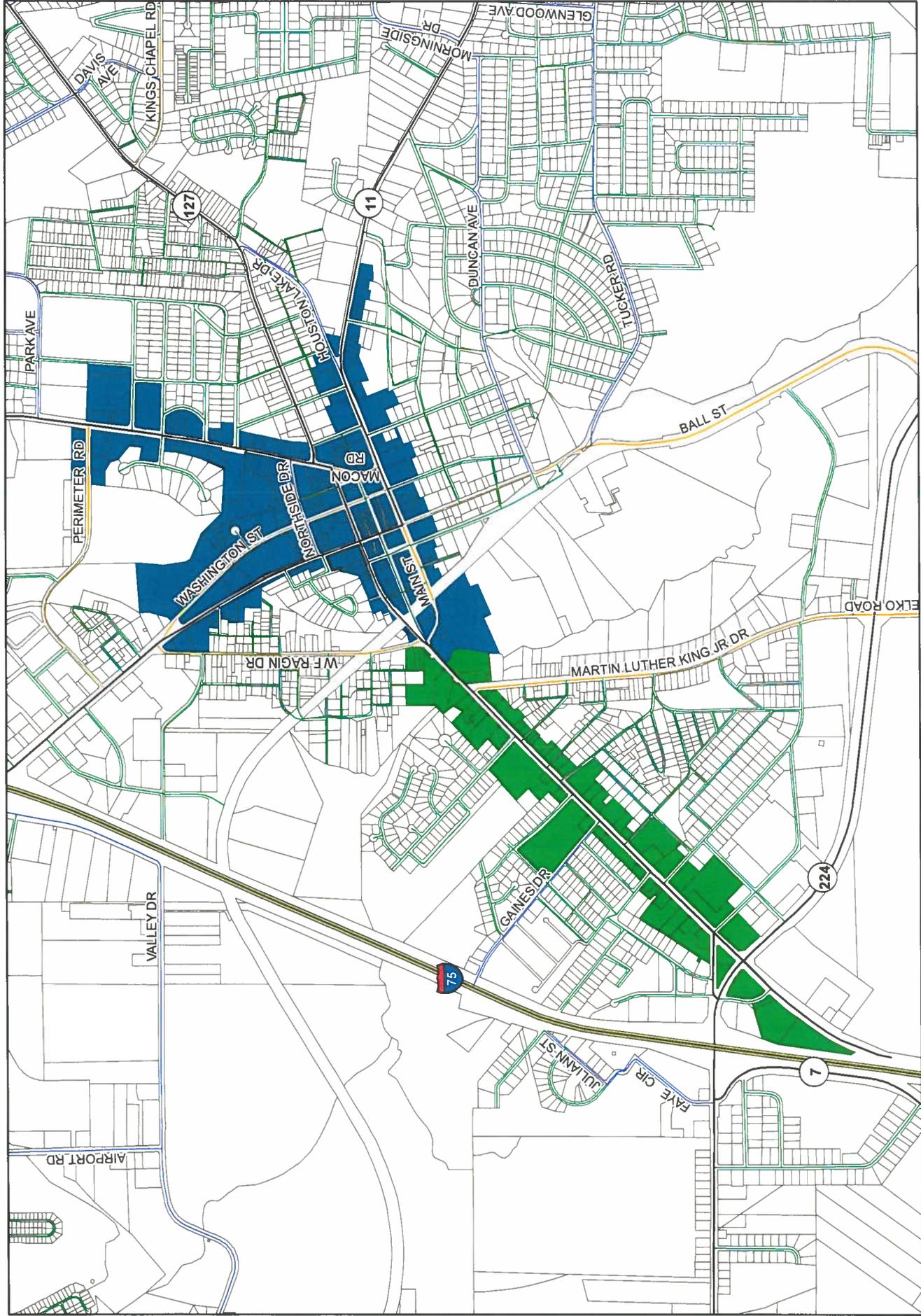
Author: Emerson Chew  
 Document Name: PDDA\_DowntownPlanningArea\_01060411\_LR11\_StructureCondition  
 Date: 01/20/16



1 inch = 1,000 feet



Legend	
	Downtown Development Authority Structures
	Downtown Planning Area
	Stand
	No Structure
	Substandard
	Dispersed



# Perry Downtown Development Plan Area



**Legend**

- Downtown Planning Area
- Gen Courtney Hodges Planning Area



Author: Emilee Chew  
Document Name: PDDP\_Compact\_20160421  
Date: 4/22/2016