



Citizen Budget Advisory Committee

5:00 – 6:30 PM, March 26th, 2025

1001 11th Ave, Greeley, CO 80631

2nd Floor Colorado Conference Room 227

Zoom Meeting: <https://greeleygov.zoom.us/j/82522074466>

Meeting ID: 825 2207 4466

AGENDA

1. CALL TO ORDER

2. ATTENDANCE & ANNOUNCEMENTS

- a. Food Tax Annual Update moved to July

3. APPROVE MINUTES FROM FEBRUARY 26TH, 2025

4. DISCUSSION ITEMS

- a. High Performing Government Department Overview
- b. Appropriation Review

5. OTHER BUSINESS

6. PUBLIC INPUT

7. ADJOURNMENT

CITIZEN BUDGET ADVISORY COMMITTEE

Wednesday, February 26th, 2025 -- 5:00 p.m.

Committee Members Present Absent Attending Guests & City Personnel:

| | | |
|----------------------|---|---|
| Barry Eastman | X | |
| Tyler Mowery | X | |
| Anthony McCune | X | |
| John Schull | | X |
| Merrie Foreman | X | |
| Lori Williams | X | |
| Javier Alvarado Vega | | X |
| Khalil N Bhanji | X | |

Laura Delp: Administrative Assistant III for Finance

Caleb Weitz: Budget & Policy Director

Jaqueline Villegas: Deputy Director of Communications and Engagement

1. Call to Order: Board/Commission Chair

Meeting called to order at 5:03 PM

2. Roll Call

3. Agenda Approval

Barry stated that he would like to restructure the agenda to move the approval of January's minutes to the beginning of the meeting. The committee agreed.

4. Approve Minutes from January 22nd, 2025

Merrie moved to approve the minutes, seconded by Barry. The Minutes were approved unanimously.

5. Citizen Input

None present.

6. Old Business

- a. Barry asked for an update on the Cascadia development plan. Caleb advised that the City is still in development discussions. A gap in funding has been identified and staff are looking at ways to either reduce project costs or seek additional funding. A more comprehensive presentation will be given to City Council on March 11th, 2025, but it is not anticipated that a firm decision will be made at that time.
 - i. Caleb advised that the City would own the arena, the hotel, water park and hockey arena and it would be operated by a nonprofit organization for 35 years after which, the buildings become the property of the City. The downside of this is that this will be the age at which the structures will require significant updates.
 - ii. Council is focusing on the financial information above all else and will consider this seriously in the coming weeks. The CBAC meeting at the end of March should provide more information on this process.
- b. Barry followed up with Caleb on the MERGE project. Caleb advised that this group will be named as the Public Review Committee for this project as well as the committee to review the Food Tax. These items will be addressed in greater detail at the March CBAC meeting. Caleb offered to have the presentation from the City Council meeting sent out to members for their review.
- c. Anthony McCune raised questions about recent discussions surrounding real estate for City/County occupied buildings. Caleb confirmed that City Council is concerned about this issue

and appears to prioritize keeping City and Council buildings downtown. There is potential for a large development project for a civic campus that would be a hub for government buildings. This has also been a subject of discussion in the Chamber of Commerce Coffee Talk meetings that occur on the First Friday at 7:30 AM to 9 AM at the Greeley Chamber office, for anyone who may find this of interest.

7. New Business –

- a. Per the City Clerk’s Office, parking permits will be required to park during the day for longer than 2 hours.
- b. Quorum is determined by the number of board positions and not the number of active members. This is a departure of practice, but it will require a minimum of five members to qualify for discussion of agenda items moving forward.
- c. There will be an Appreciation Event on May 29th hosted by the City Boards and Commissions, which will showcase the achievements of each advisory board. Staff will compose a presentation and submit it for CBAC approval at the April meeting.

8. 2024 Year in Review – Caleb Weitz

- a. Caleb provided an overview of 2024’s budget performance. There will be a more detailed presentation that will be given to Council on March 25th.
- b. At the end of 2024, the City ended with a positive fiscal impact, though varied in some areas of performance. On the negative side, the estimates for development related revenues fell short.
- c. Sales and use tax came in on target with sales tax below budget at \$700,000 and \$1.4M above budget on property tax. Oil and gas were \$4.4M above projected revenues. Interest earnings came in \$9M above budget along with a grant reimbursement from the Federal Transit Authority that netted a \$6M positive impact.
- d. The general fund has \$15M of unassigned fund balance and conversations are underway for appropriating some of these funds. There will be one-time expenditures funded with this surplus, but a significant amount will fund the Revenue Stabilization fund.
- e. Barry and Anthony expressed some concern for interest rates dropping, which may impact the City’s ability to replicate the success of 2024’s interest revenue.
- f. Caleb has offered to send the end of the year review to CBAC once that presentation is finished.

9. C&E – Jaqueline Villegas

- a. The State of the City Address is a huge event planned by Communications and Engagement. This will be held Thursday, February 27th, 2025, at 6:30-9 PM. This will deviate from last year’s event and will be more of a celebration, complete with live music.
- b. Throughout the month of April, C&E will be launching a non-resident survey to the 13 surrounding cities that will provide feedback as to the perception of Greeley. Questions will be specific to the questions asked to residents. This data will be used to adjust how Greeley communicates with residents and non-residents.
- c. Speak Up Greeley is a library of projects needing community engagement, such as surveys on Public Camping, Poudre River restoration efforts, and housing solutions.
- d. The Customer Experience Project: This project will include a new website, a non-emergency service hotline and Greeley 311. At this time, departments are collaborating to determine what content belongs on the new website. A new website is anticipated this summer.
- e. Greeley Tourism—up until recently, tourism services have been contracted out. In 2023, an assessment was conducted to determine where to direct attention to growth. The results were focused on the Union Center Civic Center, the Rec Center, Island Grove and the Doubletree downtown. This inspired a rebrand of Greeley tourism that focuses more on local businesses and availability of information for meetings, etc. There will be a calendar going up on the

website that will streamline the process for communicating events and the process for potential presenters from other cities.

- f. Lori raised concerns about how tourism efforts are going to work to support Cascadia and West Greeley development since there will likely not be many visitors that will come from Loveland and Windsor that will venture further east so support Greeley businesses. Barry suggested viewing development as a long-term investment rather than seeking an immediate fix for capturing support from visitors.
- g. Jaqueline mentioned a task force that will focus on the developments around key community partners like AIMS and UNC.
- h. The Greeley Business Beat Podcast is something new that has been showcasing local businesses and sharing their story. New episodes come out every month and listenership has doubled since its first release.

10. **Scheduling of Meetings:** Caleb provided an update on next month's agenda items. More information about the Customer Experience Project will be delivered by Bret Naber and the new Director of High-Performance Government, Kylie Jackson. Barry has asked that we pencil in a discussion about Cascadia, MERGE and downtown development and real estate.

- a. Khalil Bhanji asked questions about the role of CBAC in the budget process and Caleb and Barry responded by providing their experiences with open communication with City management as well as the availability of the mayor and city council. Caleb advised that CBAC is part of the budget process and shared the instances where CBAC has provided formal recommendations to Council.
- b. Caleb mentioned that CM Butler has requested a discussion on potential ballot initiatives this year. This should be up for discussion later in the spring (likely after April).

11. Adjournment

- a. **Motion to adjourn by Barry Eastman**
- b. **Meeting Adjourned at 6:35PM**

Next Regular Meeting:
March 26th, 2025
5:00-6:30 p.m.

City Center South - 1001 11th Ave, Greeley, CO 80631
2nd Floor Colorado Conference Room 227
Zoom(<https://greeleygov.zoom.us/j/82522074466>)

Caleb Weitz
Budget & Policy Director

Barry Eastman
Chairperson



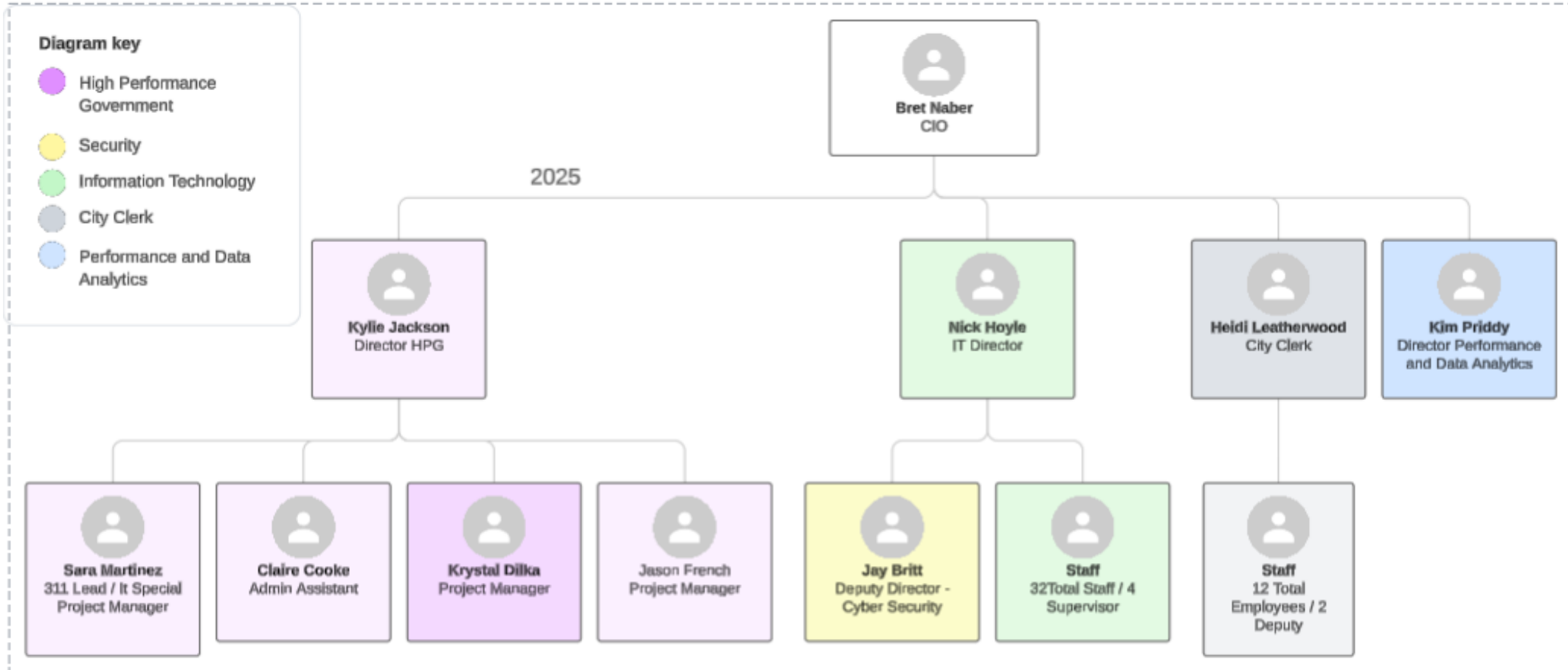
Innovation and High Performance

CBAC 3.26.25

Introduction to Innovation and HPG

- The Office ensures the City's large, transformative technology products and investments are properly planned and resourced with the appropriate decision structure, operational staffing, subject matter expertise, vendor resources and user adoption / training resources to optimize business value.

Org Chart



Innovation and HPG Position Breakdown

- 4 Staff Members -
 - (Moved from IT) Special Project Manager and Senior Project Manager
 - (Net New) Director and Admin Asst Position
- Potential Position Requests for 2026
 - Additional Analyst
 - Accessibility Staffing

Innovation and High-Performance Projects

- Utility Billing – CIS Project 2023-2025
- (CX) Customer Experience 2024-2027 (Software/Staff/Services/Implementations)
 - Content Management System Implementation
 - Call Center System
 - 311 / Workflow
- Process Improvement
 - Automation
 - Process Development
- Governance and Project Management Office
 - Building



Why do we need a new Utility Billing System (CIS)

Scope

- Acquire a vendor-hosted or cloud-based software solution to replace Community Plus.
- Provide on going support during and post implementation.

Vision

- New CIS software Implemented by end of 2025 with a seamless transition for our 30K customer base.
- Improve data for reporting and tracking.
- Reduce manual workload with new automations.

Background

- The current CIS system was acquired in the early 1990's and we have outgrown it in size and technology making it no longer meet our growing and changing needs.

What are our content *guiding principles*?

Persona-Centric

Meets the needs of our customer personas

Usable

Intended audience can easily consume the content

Accessible

Meets accessibility standards and uses plain language

Increase awareness of and access to city services and resources to foster trust and pride in the government and inspire engagement.

Transparent

Forthrightness around how decisions are made and the data behind them

Accurate & Relevant

Reliable, factual, and reflects current information

Engaging & Service-Focused

Not only informative but also appealing and actionable

What *we heard*

The role of the website

For the community

- Makes it easier to interact with the city
- Provides access to services and information

For the City of Greeley

- Delivers effective public service
- Fosters trust in the local government
- Boosts engagement and awareness of city decisions and revenue-generating services

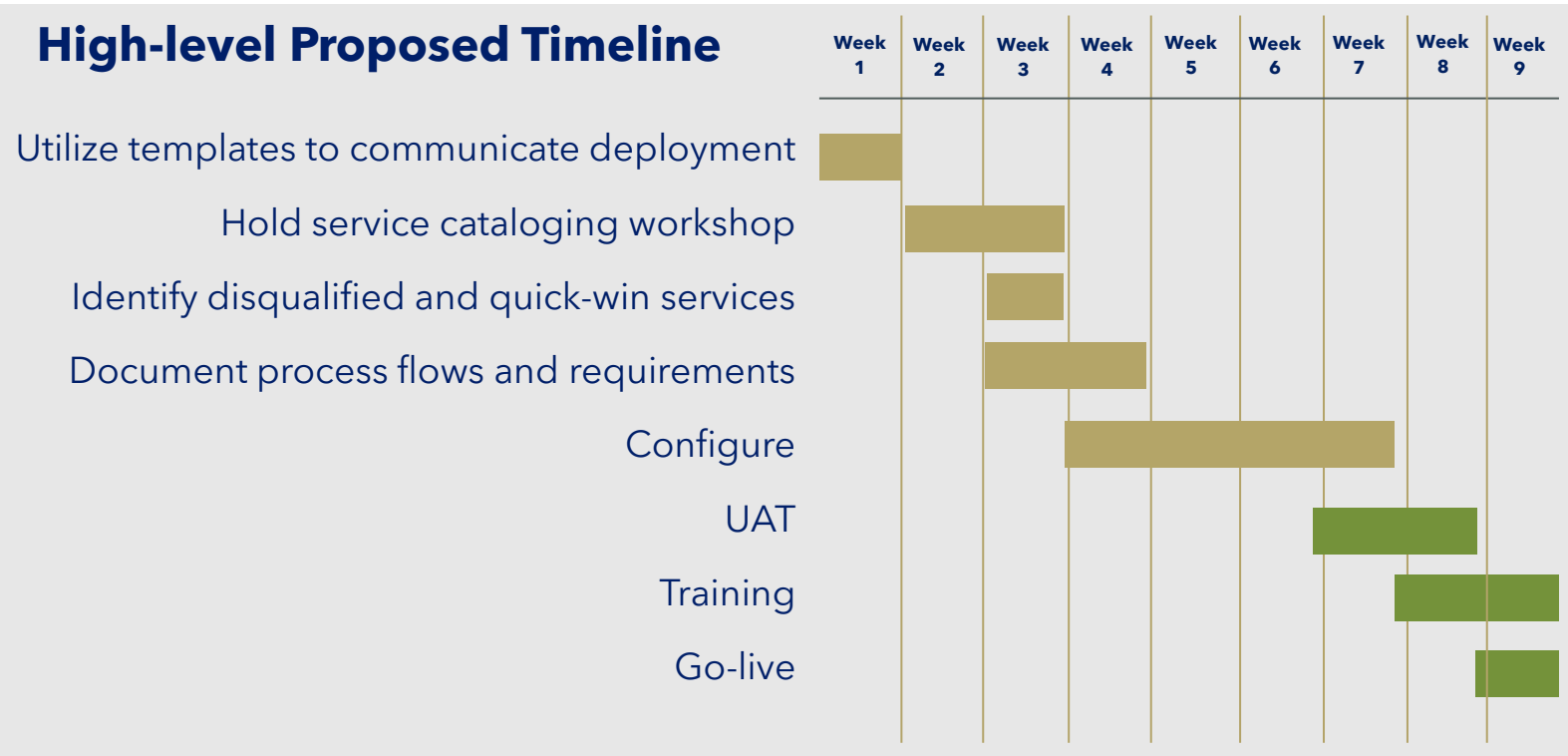
Greeley311 *Next Steps*

Following the successful completion of the Greeley311 POC, the organization is now ready to begin onboarding the remaining customer-facing departments using the deployment playbook

Expedited Approach

- The POC identified the value proposition both internally and externally is to deploy as many services as possible at the same time
- We will be focusing on internal logging of external-facing services
- MVP configuration will be:
 - Submit ticket > ticket routed to assigned Inbox for triage
 - MVP+ is expected to cover MVP CPRD service and City Clerk liquor licensing
 - Support Contact Center requirements gathering

High-level Proposed Timeline



CX Program *Building Blocks*

INTERNAL-FACING
Service Enablement

Phase 4 Focus



CX Optimization



CX Realization



CX Activation



CX Foundation



CUSTOMER-FACING
Experience Enablement

CX Vision, Strategy & Roadmap

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Project Approach - Governance & Project Management



1

Project Charter with Steering Support

2

Project Management Plan & Timelines

3

Risk & Issue Management

4

Assign tasks

5

PM Coordination with Vendor

6

Initiating, Planning, Executing, Closing

The governance structure is designed to provide strategic direction, keep the project on track, respond to challenges in a timely manner, and support the project team. We encourage open communication and welcome your ideas, solutions, concerns, issues, challenges, etc.

CX Program Governance (CoE) Structure



Questions?



Second Reading of the 2025 Supplemental Appropriation

City Council Meeting
April 1, 2025





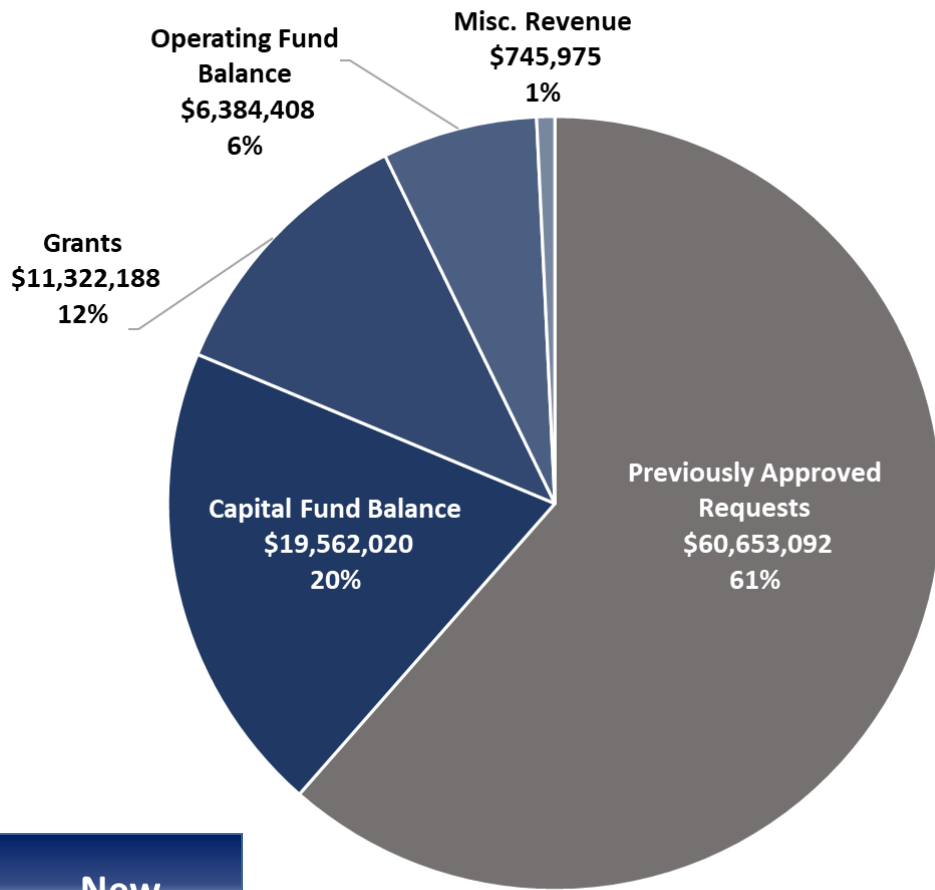
Agenda

- First Appropriation of 2025 Request Overview
- Request Breakout
- Expenditures by Key Focus Area
- Department Expenditure Allocation
- Operating Highlights
- Capital Highlights
- Purpose: Council Action on Proposed Ordinance

First Appropriation of 2025 Request Overview

- Traditionally this is a large appropriation, includes carryforwards of previous year expenditures
- Appropriation of grants & additional revenues post-2025 Budget Process
- Support operational & capital needs in 2025 that can't wait until the 2026 budget process
- Meet requirements to ensure existing commitments that were in progress at 2024 year-end can be carried forward and completed in 2025
- Total request: \$98.7M in Expenditures (\$2,850,620 in Transfers Across Funds)
- Approximately 60% of the expenditures are to appropriate previously approved requests.
- There are \$38M in new requests, \$3.9M from the General Fund

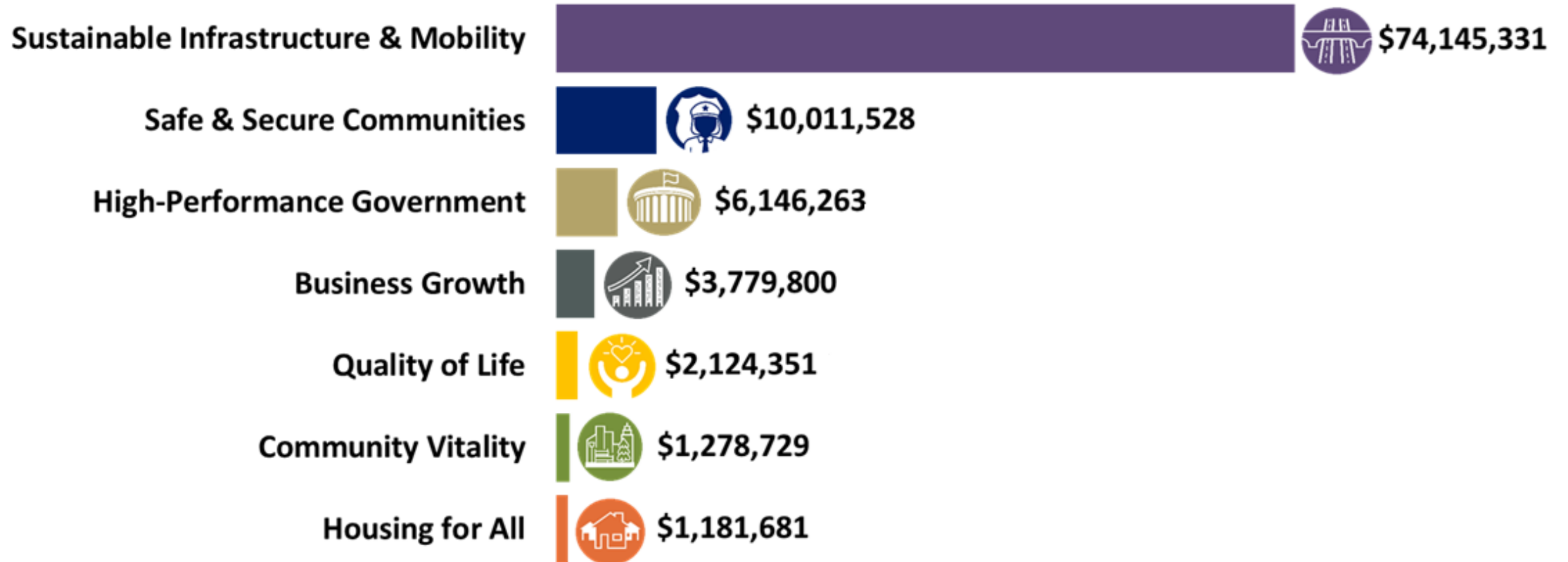
Request Breakout



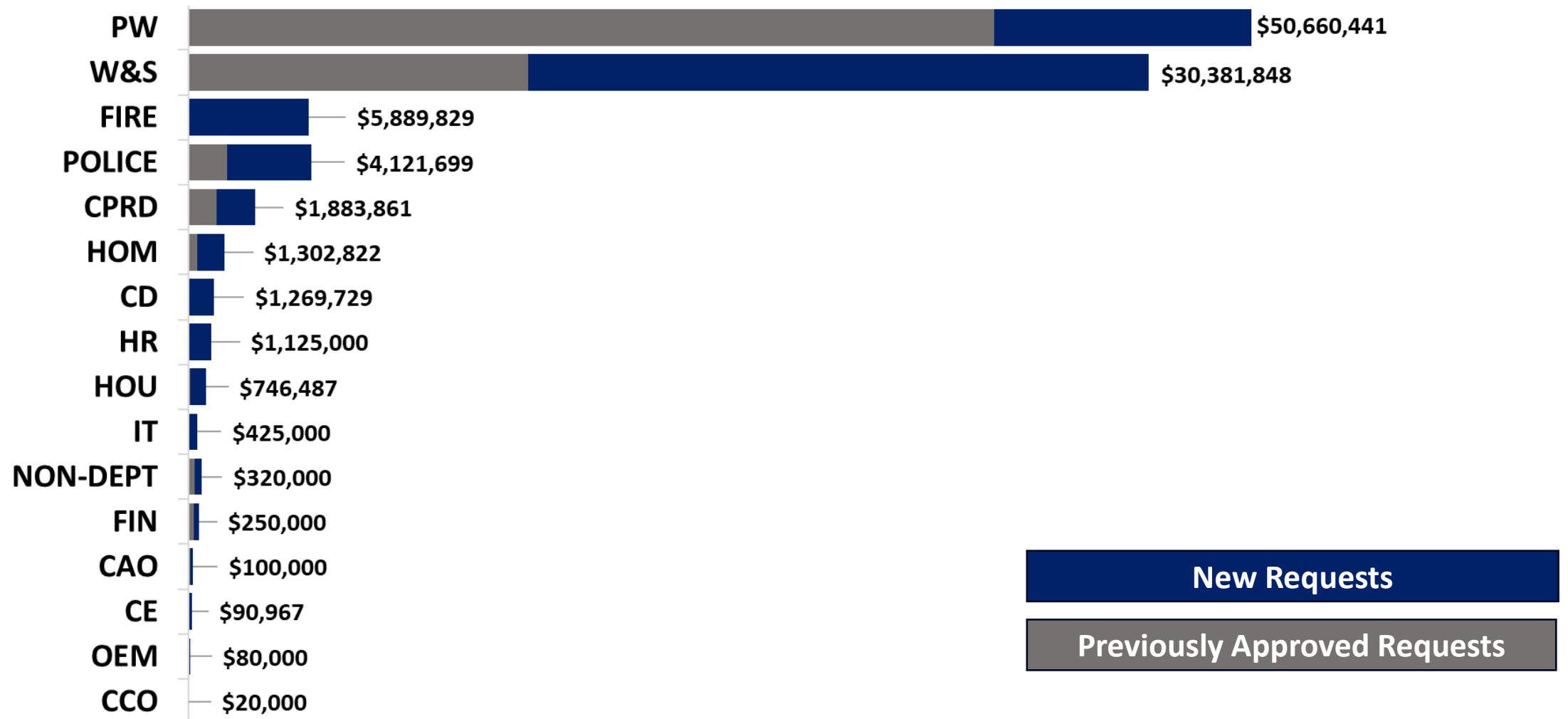
New

| New Requests | |
|--|----------------------|
| Fund Balance: Capital | \$ 19,562,020 |
| Grants | 11,322,188 |
| Fund Balance: Operating | 6,384,408 |
| Miscellaneous Revenue | 745,975 |
| <i>Damage Recoveries</i> | 203,480 |
| <i>Ticket Sales</i> | 200,000 |
| <i>Program Income</i> | 107,343 |
| <i>Intergovernmental Agreement</i> | 75,000 |
| <i>Private Contribution</i> | 70,000 |
| <i>Cash in Lieu</i> | 50,000 |
| <i>Expense Reimbursement</i> | 31,152 |
| <i>Bag Fees</i> | 9,000 |
| Total New Requests | \$ 38,014,591 |
| Previously Approved Requests | |
| Total Previously Approved Requests | \$ 60,653,092 |
| Total Appropriation (Excluding Transfers) | \$ 98,667,683 |











Appropriation by Key Focus Area








Expenditures by Department



Operating Request Highlights

| New Operating Requests | Amount |
|--|-----------|
|  2025 Cameron Peak Fire Mitigation [421 - WATER OPERATIONS] | 9,377,228 |
|  Risk Liability Appropriation [502 - LIABILITY] | 1,000,000 |
|  RTIC 2024 Rollover and Remodel Funds [121 - PUBLIC SAFETY .16%] | 970,000 |
|  THR Grant Match [177 - THR GRANT] | 855,350 |
|  Police Sgt PEHP Catch Up [100 - GENERAL FUND] | 639,000 |
|  Various PD Grants [100 - GENERAL FUND] | 628,613 |
|  Housing Department Build Out [109 - HOUSING FUND] | 517,628 |
|  Drinking Water Revolving Fund Loan Repayment [425 - WATER DEBT SERVICE] | 514,016 |
|  West Greeley Subarea Plan & FBC [100 - GENERAL FUND] | 500,000 |
|  East Greeley Subarea Plan [100 - GENERAL FUND] | 475,000 |






| Previously Approved Operating Requests | Amount |
|---|-----------|
|  Fleet Replacement Addition [512 - FLEET REPLACEMENT] | 2,728,435 |
|  RTIC 2024 Rollover and Remodel Funds [121 - PUBLIC SAFETY .16%] | 1,884,086 |
|  Unencumbered General Fund Carryover Items [100 - GENERAL FUND] | 1,075,535 |
|  Cemetery Columbarium Plaza [400 - CEMETERY] | 86,861 |
|  ESG Grant Carryover [176 - HOMELESSNESS OTHER GRANTS FUND] | 85,472 |
|  PSH Grant Carryover [176 - HOMELESSNESS OTHER GRANTS FUND] | 72,000 |



Operating Request Estimated Annual Ongoing Commitments

| New Ongoing Commitment | Estimated Annual Impact | Note |
|--|-------------------------|--|
| Housing Department Build-Out | \$680,000 | Addition of 4 full-time employees and department operating increases |
| Downtown Supplies & Median Maintenance | 216,000 | Pending retention of the Clean, Safe, Beautiful initiative in the 2026 budget |
| Mosquito Management | 76,000 | Additional ongoing costs to adequately resource this public health service |
| GROW Center Lease | 60,000 | Annual commitment until an alternative city owned property is identified |
| Annual Software Maintenance | 45,000 | Election Petition Verification Software and Emergency Management Software |
| Carestream Property | To Be Determined | The appropriation includes one-time due diligence dollars to assess the Carestream property. Ongoing O&M related to the potential property purchase are still to-be-determined |
| Total | \$1,077,000 | |

Capital Request Highlights

| New Capital Requests | | Amount |
|--|---|-----------|
|  | Fund 306 Fire Apparatus [306 - FIRE EQUIPMENT ACQUISITION/REPLACEMENT] | 5,528,112 |
|  | Airport Transportation Development [334 - ROAD DEVELOPMENT] | 3,034,800 |
|  | West Greeley Wastewater Treatment Planning [412 - SEWER CONSTRUCTION] | 1,120,560 |
|  | Carestream Public Works Due Diligence Expense [301 - PUBLIC IMPROVEMENT] | 875,000 |
|  | North Greeley Sewer Phase II [412 - SEWER CONSTRUCTION] | 820,000 |
|  | Carestream W&S Due Diligence Expenses [412 - SEWER CONSTRUCTION] | 575,000 |
|  | C Street Waterline Extension [422 - WATER CONSTRUCTION] | 422,500 |
|  | Water Treatment Master Plan [423 - WATER CAPITAL REPLACEMENT] | 410,000 |
|  | 59th & O St Project Cost Increase [334 - ROAD DEVELOPMENT] | 400,000 |
|  | Highland Hills 47th Ave Capacity Improvements [413 - SEWER CAPITAL REPLACEMENT] | 390,528 |

| Previously Approved Capital Requests | | Amount |
|---|---|------------|
|  | Stormwater Construction Projects Timing Out [432 - STORMWATER CONSTRUCTION] | 25,716,827 |
|  | Transportation Development Projects Timing Out [334 - ROAD DEVELOPMENT] | 7,785,838 |
|  | Sewer Capital Replacement Projects Timing Out [413 - SEWER CAPITAL REPLACEMENT] | 6,283,763 |
|  | Water Capital Replacement Projects Timing Out [423 - WATER CAPITAL REPLACEMENT] | 4,019,031 |
|  | Water Construction Projects Timing Out [422 - WATER CONSTRUCTION] | 3,825,732 |
|  | Keep Greeley Moving 2024 Balance [321 - STREET INFRASTRUCTURE IMPROVEMENTS] | 2,000,000 |



Recommendation

- The City recommends approving the supplemental appropriation as presented
 - Resources will be allocated to support operational needs and the continuation of planned capital projects
 - Funds will still maintain sufficient balances

Thank you

