



## Council Meeting

### AGENDA

Tuesday, November 09, 2021

6:00 PM

City Hall

---

#### I. CALL TO ORDER

1. Invocation
2. Roll Call
3. Approval of Agenda
4. Approval of Consent Agenda
  - a. October 5, 2021 Council Minutes
  - b. October 12, 2021 Council Minutes
  - c. October 21, 2021 Council Minutes
  - d. October 5, 2021 Executive Session Minutes
  - e. October 19, 2021 Planning Commission Minutes
  - f. October 26, 2021 Historic Preservation Commission Minutes
  - g. September 9, 2021 Downtown Development Authority Minutes
  - h. September 9, 2021 Conventions and Visitors Bureau Minutes

#### II. PUBLIC PRESENTATIONS

1. Walton Teen Advocacy Board Presentation

#### III. PUBLIC FORUM

1. Public Comments

**2. Public Hearing**

- [a.](#) Rezone - 140 Blaine Street
- [b.](#) Approving the Valdosta Housing Authority to Issue Revenue Bonds for Local Apartment Rehabilitation Project
- [c.](#) Zoning Ordinance Code Text Amendment #12
- [d.](#) COA Demolition Appeal - 1238 South Madison Avenue

**IV. NEW BUSINESS**

- [1.](#) Rezone - 140 Blaine Street
- [2.](#) COA Demolition Appeal - 1238 South Madison Avenue
- [3.](#) 2nd Reading - GMEBS Amended and Restated Defined Benefit Retirement Plan Ordinance
- [4.](#) 1st Reading - Zoning Ordinance Code Text Amendment #12
- [5.](#) Resolution - Authorizing the Valdosta Housing Authority to Exercise its Powers for the Purpose of Financing a Proposed Multifamily Housing Project
- [6.](#) Service Delivery Strategy Update - Resolution & Sewer Map

**V. MAYOR'S UPDATE**

**VI. ADJOURN**



The Mayor and Council met for a called meeting.

Those Present:	John Howard	Mayor
	Larry Bradley	Vice-Mayor
	Lee Malcom	Council Member
	Myoshia Crawford	Council Member
	Ross Bradley	Council Member
	Norman Garrett	Council Member
	Tyler Gregory	Council Member
	Nathan Little	Council Member
	David Dickinson	Council Member
	Logan Propes	City Administrator
	Debbie Kirk	City Clerk
	Paul Rosenthal	City Attorney

Staff Present: Danny Smith, Jeremiah Still, R.V. Watts, Andrew Dykes, Rodney Middlebrooks, Patrick Kelley, Chris Bailey, Sadie Krawczyk, Brad Callender, Les Russell

Visitors: Denise Etheridge, Kevin Duey, Rebecca Duey, Julie Sams, Shauna Mathias, Zac Johnson, Douglas Edington, Jason Sams, David Keener, Rita Moyers

**I. CALL TO ORDER – JOHN HOWARD**

**1. Roll Call**

Mayor Howard noted that all Council Members were present. There was a quorum.

**2. City Administrator Update**

City Administrator Logan Propes stated the Planning and Code Committee has recommended moving forward with the Consulting Services for the Comprehensive Plan, after meeting last week. Growth and development have been some of the biggest topics around the City. He explained the Comprehensive Plan will assist in developing a plan of action for how growth, land use, and City services are applied over the next ten-years. The City will be partnering with the County on the Countywide Comprehensive Plan, which is a five-year update that includes the other Cities also. Mr. Propes stated the City has issued 811 single family residential building permits since January of 2017. The County had 3,176 single family residences built during that same time period. The City also has to deal with how the growth in the County effects the Police, Fire, and Streets inside the City. All of these aspects will be taken into account in the Comprehensive Plan. They will consider police services, fire station locations, and whether roundabouts or traffic signals are needed. He discussed the Public Safety Retirement Plan Enhancements. He stated there has been epic rainfall that has caused flash flooding and the stormwater system is not designed to handle these events. Some areas of the City that have seen little to no changes in stormwater elements are now being inundated and overrun. The City is going to work with Keck & Wood to do a ten-year master plan for the stormwater system. There will be a Traffic Calming Public Information Meeting on October 25, from 5:30 to 7:30 pm. Mr. Propes stated a study will be done early next summer on Impact Fees, which will be a very long process. The study will show how much should be charged for each service of impact; the impact fees must be integrated into the Comprehensive Plan. He explained many of the major utility infrastructure milestones in the 2020 Utility Bond Package are being reached.

### **3. Central Services Update**

Mr. Chris Bailey stated the facilities and grounds crews picked up over 6,700 pounds of trash around the City, which is more than was collected at the Cleanup Event earlier in the year. The 2020 CDBG Stormwater Project will be starting on October 11; the project will include the East Washington, Felker, Hubbard, and Mobley Circle areas. Project updates will be communicated by social media, website, and signage. He explained the 2021-22 Leaf Season Collection Schedule will be from November 1 until January 31, five-days a week. Phase II of the Plaza Shopping Center Project was shutdown for over a week, due to sickness, but they have started back to work now. The second Community Cleanup Day is scheduled for December 4. He stated the updated project timeline is attached with the report.

## **II. COMMITTEE INFORMATION**

### **1. Finance**

#### **a. Monthly Finance Report**

Council Member Tyler Gregory explained that Ms. Beth Thompson is currently at the GGFOA Meeting, and City Administrator Logan Propes will answer any questions.

### **2. Airport**

#### **a. Monthly Airport Report**

Mr. Chris Bailey presented the monthly Airport Report. The City is continuing to work with the engineers on the maintenance hangar layout and the terminal building design. He stated the 5-Year CIP will be discussed during the Budget Meeting next month. The Runway Paving Project has been completed, and the City will receive a refund for the ten percent retainer from the State. The Avgas Fuel sales had the second highest month since August of 2015.

### **3. Public Works**

#### **a. Monthly Solid Waste Report**

Mr. Danny Smith presented the monthly Solid Waste Report. The new scales at the Transfer Station are scheduled to be installed on November 5; a temporary rental scale will be installed for operations to continue. The tonnage at the Transfer Station increased 776 tons compared to this time last year. He stated 175 additional customers have signed up for the Curbside Recycling Program. Glass collection participation is also up, with a little less than two tons being collected.

#### **b. Monthly Streets & Transportation Report**

Mr. Jeremiah Still presented the monthly Streets & Transportation Report. The paving portion of the LMIG Project has been completed; there is still some shoulder work left on Bryant Road, and the striping should be finished next week. The workorders are steadily rolling in for Stormwater. The crews cleaned almost 1,000 pounds off of 180 grates in August. He explained the leaves clog the drains, but they are doing everything they can to make sure things are safe and working properly. The signage in the medians is currently being upgraded on Church Street.

**4. Utilities****a. Monthly Electric & Telecom Report**

City Administrator Logan Propes presented the monthly Electric & Telecom Report. The Fiber to the Home Project is making progress slowly, due to material lead time problems.

Council Member Nathan Little stated the Pavilion telecom services are active. The Pavilion primary and secondary electric loop is energized, and the street light system has been designed and confirmed. The Wayne Street underground primary design is complete and will be sent to Keck & Wood. Primary ONT fiber loops are pulled, and underground tap splicing has started.

**b. Monthly Water, Sewer, & Gas Report**

Mr. Rodney Middlebrooks presented the monthly Water, Sewer, & Gas Report. He stated all the pump stations in the City have been flooded and alarming all day. The crews have started working on the six-inch natural gas main on Highway 186 again. The documents are being prepared for the rock bore at Jacks Creek and will be presented next month. Mid-South has completed all of the pipe work for the Alcovy River and Highway 138 Sewer Project; they will start testing next week. The demo on the Sewer Plant building has begun. They started testing the Loganville Water Line last week; there should be a million gallons a day pumping to Loganville by tomorrow. He discussed the Natural Gas Advantage Rebate Program.

**5. Public Safety****a. Monthly Fire Report**

Fire Chief Andrew Dykes presented the monthly Fire Report. The department responded to 239 emergency incidents, with nine of them being fires. One fire had substantial loss, but there were no significant injuries. He stated the call distribution map is similar to previous months; the call volume was up compared to the last two years. There is one new firefighter starting today and one new firefighter starting tomorrow, both have three years of experience. This will put them back to being fully staffed. He will send Council a bio for the two new firefighters and the new officers. He stated October is Fire Safety Month. All of the Elementary Schools they used to visit for Fire Safety are now located in the County, but the County does not currently have a Fire Safety Educator. The City Fire Marshall will be providing the education and the County will be providing the fire trucks for the schools; both the City and County will be providing resources for Fire Safety Education. He explained they will also be going to various churches and daycares in the City.

**b. Monthly Police Report**

Police Chief R.V. Watts presented the monthly Police Report. The calls for service were down by 155 from this time last year, the area checks were down, Part A Crimes were down, Part B Crimes were up, and the arrests were down. There were six guns taken off the streets. He encouraged Council to come see the evidence room, with all the weapons that have been taken off of the streets. Chief Watts discussed the vandalism at the Museum, which has a \$500 reward for information. They currently have one juvenile in custody and leads on the other juveniles involved. The department is in the process of putting together a public service announcement to educate the citizens before the Red Speed School Zone Program goes live. He explained they had nine vacancies and five of them have been filled; three females and two males have been hired. The department had Active Shooter training today and again next Tuesday at 1025 Church.

**c. Approval – HVAC Purchase and Installation**

Mr. Chris Bailey explained the request for the additional HVAC maintenance, repairs, and additions at the Police Department. Installation for the dehumidifier in the Court Room will cost \$7,430.00; it will keep the air temperature at a certain balance by adjusting itself when there is no one in the room. The electrical work will be done inhouse. The cost to fix the condensation on the pipes by rerouting the ductwork will be \$4,375.00. Installation of the PVC drain lines on the roof will cost \$3,995.00; this will get the excess condensation off of the flat roof. He requested approval for Paulson-Cheek Mechanical for a total cost of \$15,800.00. Mr. Bailey stated a letter will be sent to the original architect concerning these additions and changes.

The committee recommends approval of Paulson-Cheek Mechanical for the total amount of \$15,800.00 to Council.

*Motion by R. Bradley, seconded by Dickinson.  
Passed Unanimously.*

**6. Planning & Code****a. Monthly Code Report**

Mr. Patrick Kelley presented the monthly Code Report. The Code office had 134 inspections, 88 total permits, ten new businesses acquired licenses, and zero businesses closed. He stated The Roe is doing a phased opening; they are hoping to get the restaurant open as soon as possible. The City Marshals removed 62 signs from the roadway, issued 336 repair / cleanup notices, investigated a utility tampering case, and issued eight citations. They also completed 12 hours of POST training. He discussed adding funding for Keck & Wood to do an expansive review of the global effect concerning stormwater for the future.

**7. Economic Development****a. Monthly Economic Development Report**

Ms. Sadie Krawczyk presented the monthly Economic Development Report. She discussed the Javianne Oliver Olympic Celebration and Parade, which had a great turnout. The Bicentennial 5K Race will start at 8:00 am on Saturday and Fall Fest will be on Broad Street from 10:00 to 4:00 pm. She explained the request for proposed plans has been posted for the Milner-Aycock building. An onsite pre-submittal meeting will be held on Friday at 10:00 am; the proposals are due on November 14.

**8. Parks****a. Monthly Parks Report**

Mr. Chris Bailey presented the monthly Parks Report. He stated the new drainage system for the lower play area at Pilot Park worked great today. There will be some bridge repairs done at Childers Park while preparing for the Parade of Lights. A study of the pond and dam will be done on October 20 at Mathews Park. The specs for Pilot Park and Mathews Park restrooms were approved last week; they now have a four-month lead time. The pavilion also has an approximate four-month lead time.

**III. ITEMS OF DISCUSSION**

- 1. Preliminary Plat Review – Mountain Creek Estates**
- 2. Preliminary Plat Review – River Pointe**
- 3. 1<sup>st</sup> Reading – GMEBS Amended and Restated Defined Benefit Retirement Plan Ordinance**
- 4. 2<sup>nd</sup> Reading – Zoning Ordinance Code Text Amendment #11**

There was a general discussion on the above items. There was no action taken.

**IV. ITEMS REQUIRING ACTION**

**1. Consultant Services to Prepare a Comprehensive Plan Update**

Ms. Sadie Krawczyk stated the recommendation from the Planning and Code Committee and staff for conducting the Comprehensive Plan Update is Hall Consulting.

To approve Hall Consulting.

*Motion by Malcom, seconded by L. Bradley.  
Passed Unanimously.*

**V. MAYOR’S UPDATE**

Mayor John Howard thanked Mr. Gregory and Ms. Krawczyk for helping with Hope Monroe and Habitat for Humanity; they started building a house Saturday. It will be the first house they have done in over a decade. He stated his appreciation for those who attended. Mayor Howard reminded everyone about the Budget Retreat on October 21 starting at 9:00 am.

**VI. ADJOURN TO EXECUTIVE SESSION**

*Motion by R. Bradley, seconded by Gregory.  
Passed Unanimously.*

**RETURN TO REGULAR SESSION**

**VII. ADJOURN**

*Motion by Little, seconded by Gregory.  
Passed Unanimously.*

---

**MAYOR**

---

**CITY CLERK**

The Mayor and Council met for their regular meeting.

Those Present:	John Howard	Mayor
	Larry Bradley	Vice-Mayor
	Lee Malcom	Council Member
	Myoshia Crawford	Council Member
	Ross Bradley	Council Member
	Norman Garrett	Council Member
	Tyler Gregory	Council Member
	Nathan Little	Council Member
	David Dickinson	Council Member
	Logan Propes	City Administrator (via phone)
	Debbie Kirk	City Clerk
	Paul Rosenthal	City Attorney

Staff Present: Danny Smith, Jeremiah Still, R.V. Watts, Andrew Dykes, Beth Thompson, Tommy McClellan, Chris Bailey, Patrick Kelley, Brad Callender, Les Russell

Visitors: Sharon Swanepoel, Denise Etheridge, Todd Hardigree, Frank Masiello, Joseph Zalatan, Laurie Hawks, Julie Sams, Shauna Mathias, Clayton Mathias, Kim Jolly, Ken Gauthier, Martha Gauthier, Michelle Mirolli, Jay Filipiak, Janice Hiatt Hawks, Carole Queen, Hugo Bryan-Porter, Joanne Campbell, Jim Campbell, Theresa Mitchell, Todd Mitchell, Vic Lazich, Jason Sams, Travis Pegram, Amy Maughon, Lynn Brooks, Ashley Dykes, Eli Dykes, Matt Bidwell, Carole Hamby, Kevin Seifert, Lee Rowell

**I. CALL TO ORDER – JOHN HOWARD**

**1. Invocation**

Pastor Hugo Bryan-Porter of Lighthouse World Outreach Center gave the invocation.

**2. Roll Call**

Mayor Howard noted that all Council Members were present. There was a quorum. He stated City Administrator Logan Propes was present via telephone.

**3. Approval of Agenda**

To approve the agenda as presented.

*Motion by R. Bradley, seconded by Malcom.  
Passed Unanimously*

**4. Approval of Consent Agenda**

- a. September 7, 2021 Council Minutes
- b. September 14, 2021 Council Minutes
- c. September 14, 2021 Executive Session Minutes

- d. September 28, 2021 Planning & Code Committee Minutes
- e. September 21, 2021 Planning Commission Minutes
- f. September 9, 2021 Historic Preservation Commission Minutes
- g. September 28, 2021 Historic Preservation Commission Minutes
- h. Approval – HVAC Purchase and Installation – Paulson-Cheek Mechanical for a total cost of \$15,800.00. (Recommended for Council approval by Public Safety Committee October 5, 2021)

To approve the consent agenda as presented.

*Motion by Little, seconded by R. Bradley.  
Passed Unanimously*

**II. PUBLIC PRESENTATION**

**1. Proclamation – Domestic Violence Awareness Month**

Ms. Ashley Dykes, with Project ReNeWal, stated one in four women and over 15 million children are affected by domestic violence nationwide. Project ReNeWal is a domestic violence shelter and intervention program that serves Walton, Newton, and Rockdale Counties. She explained they would not be able to provide this service without community support. They have the only men’s units in the State and a children’s outreach. Their mission is to ensure that victims of domestic violence learn to live a violence free life and empower survivors to thrive without their abusers. Dancing with the Stars of Project ReNeWal will be on February 26; the event was postponed in 2020, due to COVID.

Mayor John Howard presented the Proclamation for Domestic Violence Awareness Month.

*No Action.*

**III. PUBLIC FORUM**

**1. Public Comments**

Mr. Travis Pegram, of 497 Cedar Ridge Road, stated he is a former pastor. He was the 2021 Leadership Walton Class President and fell in love with Monroe and Walton County. His family moved to Cedar Ridge Road. He expressed his concern for the big developments and how they will affect their quality of life. His family bought a two-acre property because they did not want to live in a subdivision. He questioned the City having smart growth, organic growth, and generational growth. He discussed struggles with traffic, street racing, and accidents.

Ms. Amy Maughon, of 1735 Double Springs Church Road, stated she has lived there for 20 years. She is concerned about the largest proposed subdivision in the City of Monroe, which will definitely impact the quality of life for the residents on Double Springs Church Road. It is a rural road with agricultural land and large lots ranging between five and 100 acres. There will be thousands of additional vehicles traveling the road due to the new massive development. As a result, the current and long-time tax paying citizens will have quality of life issues. Many of their residents ride their horses, drive tractors, and walk their dogs down the road; the additional traffic will make these activities unsafe. She discussed how the new shopping center is already going to cause there to be more traffic. Ms. Maughon requested for the new development to be tabled until due diligence can be finalized or the impact of the traffic from the new shopping center can be assessed.

Ms. Laurie Hawks, of 1730 Double Springs Church Road, stated her concern for the River Pointe Subdivision and other subdivisions. They will impact their community on Cedar Ridge and Double Springs dramatically. She has lived there for 15 years and has had a family farm for 50 years. There are at least four families that have three generations living on Double Springs Church Road. Council has the ability to influence whether the next generation stays. She is a planner in the water industry and plans for the impact of development and protecting water resources. She questioned the water and wastewater infrastructure, the capacity of the school system, and fire protection. The City needs an infrastructure plan, instead of trying to play catch up. She discussed Double Springs Church Road being curvy and super dangerous, even without the future development. There will be some very significant impacts. She thinks there is an opportunity to pause, and the City and County should coordinate more. Ms. Hawks suggested buffer areas between a 30-acre farm and a 300-lot subdivision. She requested for Council to pause, to take the time to plan, and to consider a moratorium on land disturbance permits.

Mr. Todd Hardigree, of 1627 Highland Creek Drive, discussed his concerns. He read the traffic study but did not see anything about the new Publix, YMCA, or subdivision across from the school. He moved here three years ago to keep from living in Gwinnett. He discussed his concerns about traffic, speeding, water pressure volume, and adequate police protection. He requested the subdivision to be tabled.

Mr. Jay Filipiak, of 1904 Highland Creek Drive, stated he used to build houses. He is concerned about the variances on their street. There has been a lot done to the streets and downtown; he does not have a problem with growth. He believes Cedar Ridge Road would be straightened, but questioned whether the County is going to pay for it. Mr. Filipiak questioned zoning allowing that many houses so close together. They have nice homes, and he is concerned about protecting his own investment. He discussed the façade, traffic issues, and the variance from the Highway. He complimented Publix and the YMCA.

Mr. Lynn Brooks, of 471 Cedar Ridge Road, stated he has lived on Cedar Ridge for 38 years. He discussed R1 Zoning having a 14,000 square foot minimum, which would be 120 feet by 120 feet wide. That would be a lot of houses. There would be nine houses across from his fence line. He discussed speeding, wrecks, and traffic issues. Double Springs Church Road is already like a highway, and there is also a subdivision coming on Alcovy River, at the end of the road. Mr. Brooks discussed the land having a complete drop off just past his pasture. He suggested for Council to come out and take a look at the property.

#### IV. NEW BUSINESS

##### 1. Preliminary Plat Review – Mountain Creek Estates

Code Enforcement Officer Patrick Kelley presented the Preliminary Plat Review for Mountain Creek Estates located at 935 McDaniel Street. He stated the plat was reviewed for conformance with the Development Regulations, which is the criteria utilized for preliminary plat recommendations. The 75-lot plat has been revised to have 73-lots on 49.82 acres, and they may have to make some more corrections. The Planning & Zoning Commission and Code Office recommend approval, with the corrections noted in the staff report. He stated there were some technical issues that they are working on getting fixed.

Council Member Norman Garrett questioned the 73-lots.

Mr. Kelley stated the lot quantity changed, due to the comment corrections. They may lose one or two more lots when they get in complete compliance with the development regulations. Currently, there would be a maximum quantity of 73-lots. His recommendation is for approval



once the recommended corrections have been made to the plat, which the developer has agreed to make.

Council and Mr. Kelley discussed the process for approval, revision requests, approval stipulations, and whether all changes need to be made prior to approving the plat.

Mr. Kelley explained this is a preliminary plat not development plans; the preliminary plat basically shows the division of the property.

City Attorney Paul Rosenthal stated this is the second stage in matters coming to Council. The first matter would be a rezone or a variance. Then, they would come back for preliminary plat approval. Then, they come back for final plat approval. The rezone stage is where policy issues are generally made. He stated this project has been approved for a very long time. This item is not completely technically administrative in nature, but it is certainly much less legislative policy decision in nature than a rezone decision. Preliminary plat and final plat approvals are administrative type decisions. He stated it is common for preliminary plat approvals to be approved subject to staff conditions being met. This allows a land owner to proceed with a land disturbance permit, to proceed with construction or building plans, and then to begin construction. They must then come back to Council for final plat approval, which is when the public infrastructure will be accepted.

Council Member Lee Malcom requested for Mr. Kelley to explain the by-right development situation for both of these plats to the citizens, prior to going forward with either of the preliminary plat approvals.

Mr. Kelley explained they have the right to develop in the pattern prescribed by the Zoning Ordinances for the property, if they follow all of the zoning regulations and development regulations. The only time the City has any input is when they are asking for a rezone or some type of variance. They can build what the City prescribes for that zoning classification, as a by-right use. The City is required to recommend approval of the preliminary plat if they meet those perimeters, because there is no reason to recommend denial.

Ms. Malcom stated these were both approved 15 to 20 years ago as zoned today, which is why public hearings are not being held for either of the developments.

Mr. Kelley stated this project was rezoned over 15 years ago, and the downturn affected the project. The next project was rezoned to R1 in 2001, but that is another issue all together.

Mr. Rosenthal stated that R1 Zoning is the least dense residential single-family zoning classification in the City Zoning Ordinance, which means it has the largest lots.

To approve the Preliminary Plat for Mountain Creek Estates as presented.

*Motion by Dickinson, seconded by Malcom.  
Opposed: Garrett.  
Passed 7-1.*

## **2. Preliminary Plat Review – River Pointe**

Code Enforcement Officer Patrick Kelley presented the Preliminary Plat Review for River Pointe subdivision located at the corner of Double Springs Church Road and Cedar Ridge Road. He explained The Pacific Group submitted the Preliminary Plat Review in order to pursue development plans. The Planning & Zoning Commission and Code Office recommend approval

of the Preliminary Plat, with the four conditions listed in the staff recommendation. He stated the four corrections have all been made.

Vice-Mayor Larry Bradley stated the property has an R1 Zoning today, which says that by-right the people have the right to build based upon that zoning, as they have proposed. However, it is incumbent upon Council to ensure that the infrastructure is satisfactory for any development being built.

Council Member Norman Garrett questioned Council previously approving that infill development allows 10 houses to be built on an acre.

Mr. Kelley answered that only applies to the prescribed IOD area, which basically surrounds downtown. It is a limited geographic area, and this particular development is not in that geographic area. He and the developer have discussed potentially phasing the project, due to the infrastructure and other concerns. The developer has also given the Code office a draft development agreement, which would need to be submitted to the City Attorney's office. He stated it may be best to give this project time for some further consideration. The project could possibly go to a phased approach or they may need to start over. Mr. Kelley explained as presented, his recommendation is still for approval of the plat based on ordinance compliance.

Council Member Tyler Gregory thanked the citizens for giving their input. Council shares their concerns for traffic and the water system. He believes holding off on the project is a good move.

Council Member Myoshia Crawford stated she agrees with postponing the project.

Council Member Ross Bradley stated he feels it is too much, too soon.

Council Member Lee Malcom stated she agrees with the citizens' concerns for fire protection, policing of the area, and the impact from the shopping center. She does not believe that the traffic study is up to date as it should be, and it needs to be further investigated.

To table this matter until the December 14, 2021 Council Meeting. The motion is due to several of the unknown issues concerning water pressure, sewer availability, and fire protection in the area of this development that needs to be further investigated. A phase in may need to be done with the developer, because it is too much too soon. Tabling this matter will give the developer and City staff time to work through putting together an appropriate development agreement that will address many issues and concerns about this development.

*Motion by Malcom, seconded by Garrett.  
Passed Unanimously.*

### **3. 1<sup>st</sup> Reading – GMEBS Amended and Restated Defined Benefit Retirement Plan Ordinance**

Mr. Les Russell explained the proposed amendment will change the pension plan to 50 years of age and 20 years of service for Public Safety Personnel. The change will cost the City an additional \$103,000.00. This will not affect the budget until 2023, because the evaluation for 2022 has already been accomplished.

Council Member Norman Garrett questioned how many employees the change will affect within the next five years.

Mr. Russell stated there are three employees that would qualify as of today. He stated one of the three already qualifies for retirement, and a second one is about to qualify. The third will qualify later this year. There would be three to qualify in 2022, one in 2023, one in 2024, and two will qualify in 2025.

Council and Mr. Russell further discussed years of service, pay percentages, and qualifying requirements for retiring.

Mr. Garrett questioned how many employees would be able to retire with 20 years of service, without being 50 years of age, and why it is not being offered to all of the City employees.

Mr. Russell stated there would be 17 employees that would qualify for retirement on the service side for having 20 years within the next five years. He explained this will encourage employees to stay with the City and will make recruitment easier. The City is not a highly competitive organization, but this will help set the City apart. Mr. Russell explained the reason it is not being offered to all employees is due to cost. It will affect about 40% of the workforce with police and fire; it would cost approximately \$350,000.00 for the entire workforce.

Council Member Lee Malcom stated this is for the traumatic jobs for police and fire, which is different than a normal City worker.

Mr. Russell explained the objective is to retain the current officers and make recruiting easier. It is a tough job that has a lot of mental stress.

Council, Mayor, Mr. Propes, and Mr. Russell discussed the history behind the changes. They discussed keeping existing Public Safety staff and getting replacements when they leave, particularly in the Police Department.

City Attorney Paul Rosenthal presented the first reading of the ordinance.

#### **4. 2<sup>nd</sup> Reading – Zoning Ordinance Code Text Amendment #11**

City Attorney Paul Rosenthal gave the second reading of the ordinance to amend the Official Zoning Ordinance with Amendment #11 by implementing text amendments and changes identified in Exhibit A. Article VI – Use Provisions by District, Section 630.3, Table 6 – Industrial Zoning District Land Use Regulations – to add the principle use of Agriculture: Greenhouse, nursery, and floriculture production–indoor food crop production; and under the principle use of Industrial: Industry, heavy-manufacturing, repair, assembly, or processing – to add biodiesel fuel production. The added land uses will be permitted by right in the M1 Zoning District.

To adopt the Zoning Ordinance Code Text Amendment #11 as presented.

*Motion by Malcom, seconded by L. Bradley.  
Passed Unanimously.*

#### **5. Renewal – Health and Ancillary Insurance**

Mr. Les Russell discussed the COVID Wellness deductible that was added into the health plan, with the goal of spurring employees to get vaccinated. There were 28 employees vaccinated in May and now there are 64. He discussed the costs caused by COVID this year. In May, the COVID costs were about \$400,000 for the City. It is the beginning of October and the claims are already up to \$480,000 for COVID related illness, and there are still two large claims to come. Total claims are estimated to be 102% of what was estimated for the year, which will

affect next year's renewal. He stated the biggest emphasis this year is to get employees to socially distance, wear their mask, or get a vaccine. Vaccinated people going into the hospital are usually out within a couple of days. Long term COVID illnesses are costing around \$275,000 per claim; costs would be down without the COVID claims. The pharmacy management program is saving the City \$192,000 plus the \$350,000 that was saved by closing the clinic has resulted in the City having a great year for claims.

Mr. Matt Bidwell, with MSI Benefits Group, reviewed the changes made last year and the lowered deductibles for participating in the wellness program. He discussed the clinic closing in March, getting generic drugs without a copay, and getting six free doctor visits. He compared insurance renewals and claims for the last few years. Mr. Bidwell explained that if the renewal is accepted today the large October claims can not be used against the renewal. He discussed the renewal offer in detail. He recommends renewal with Aetna, with the deductible being raised from \$60,000 to \$70,000. This will drop the fixed cost for the stoploss insurance. The City will not have any laser liabilities for the upcoming year. He suggests a 2% increase in employee contributions for 2022. There will be a 5.7% increase on the dental plan with MetLife. The City offers a high plan and a low plan for dental coverage. The City pays all of the employee cost and half of the family cost for the low plan, and the employee pays the difference if they choose the high plan. Mr. Bidwell suggested changing the higher plan option maximum annual amount from \$2,000 to \$3,000. This will only affect the employees with the high plan and will not impact the City's cost.

Mayor, Council, Mr. Russell, and Mr. Bidwell further discussed insurance costs, percentages, reinsurance amounts, and wellness credits.

To approve renewal of the 2022 Health & Ancillary Insurance Policies as recommended, with the \$70,000.00 reinsurance deductible.

*Motion by Dickinson, seconded by R. Bradley.  
Passed Unanimously.*

## **V. MAYOR'S UPDATE**

Mayor John Howard stated Publix is on schedule to be selling groceries in January. He visited the site today. He explained Council can talk to Mr. Lee Rowell to schedule a tour. Fall Fest had a great turnout for an awesome day.

Council Member Ross Bradley read an email sent to the Public Safety Committee concerning the amendments to the retirement plan for Public Safety Personnel. He stated he feels it is important to focus on the physical and emotional dangers of Public Safety.

## **VI. ADJOURN**

*Motion by Little, seconded by Gregory.  
Passed Unanimously.*

---

**MAYOR**

---

**CITY CLERK**

The Mayor and Council met for a called meeting.

Those Present:	John Howard	Mayor
	Larry Bradley	Vice-Mayor
	Lee Malcom	Council Member
	Ross Bradley	Council Member
	Tyler Gregory	Council Member
	Nathan Little	Council Member
	David Dickinson	Council Member
	Logan Propes	City Administrator
	Debbie Kirk	City Clerk

Absent:	Myoshia Crawford	Council Member
	Norman Garrett	Council Member

Staff Present: Beth Thompson, Chris Bailey, Les Russell

**I. CALL TO ORDER**

Mayor Howard noted that Council Member Norman Garrett and Council Member Myoshia Crawford were absent. There was a quorum.

To amend the agenda to add Item III – Development Discussion and Direction to Staff.

**II. DEPARTMENTAL OPERATING & CAPITAL IMPROVEMENT BUDGETS**

There was a general discussion on the above item. There was no action taken.

**III. DEVELOPMENT DISCUSSION AND DIRECTION TO STAFF**

There was a general discussion on the above item. There was no action taken.

**IV. ADJOURN**

*Motion by Gregory, seconded by Dickinson.  
Passed Unanimously.*

\_\_\_\_\_  
**MAYOR**

\_\_\_\_\_  
**CITY CLERK**

The Mayor and Council met for an Executive Session.

Those Present:	John Howard	Mayor
	Larry Bradley	Vice-Mayor
	Lee Malcom	Council Member
	Myoshia Crawford	Council Member
	Ross Bradley	Council Member
	Norman Garrett	Council Member
	Tyler Gregory	Council Member
	Nathan Little	Council Member
	David Dickinson	Council Member
	Logan Propes	City Administrator
	Debbie Kirk	City Clerk
	Paul Rosenthal	City Attorney

**I. Call to Order – John Howard**

**1. Roll Call**

Mayor Howard noted that all Council Members were present. There was a quorum.

**II. Legal Issue (s)**

**1. Legal Matter**

Legal matters were discussed, including attorney-client discussions.

**III. Real Estate Issue (s)**

**1. Real Estate Matter**

Real estate matters were discussed, including attorney-client discussions.

**IV. Adjourn to Regular Session**

*Motion by R. Bradley, seconded by Little.  
Passed Unanimously.*

\_\_\_\_\_  
**MAYOR**

\_\_\_\_\_  
**CITY CLERK**

**MONROE PLANNING COMMISSION  
MEETING MINUTES—October 19, 2021**

**Present:** Mike Eckles, Randy Camp, Chase Sisk, Rosalind Parks, Nate Treadaway

**Absent:** None

**Staff:** Pat Kelley – Director of Code  
Laura Wilson – Code Department Assistant  
Brad Callender – City Planner  
Logan Propes—City Administrator  
Paul Rosenthal—City Attorney  
Sadie Krawczyk—Economic Development Director

**Visitors:** Joann Campbell, Jim Campbell, Janice Hanks, H. Patel, Kalen Vanderhorst, Susan Tyre, Mark Tyre, Ian Harmon, Craig Harmon, Blake Barton, Jeff Russell, Don Harkleroad, Elizabeth Kim, Duane Sells, Jackson Sells, Lee Rowell, Joel Heffington, James & Stephanie McDaniel, Todd Mitchell, Frank Mabielo, Cheryle Larson, Vic Lazich, Bob Begle, Clint Dixon

Call to Order by Chairman Eckles at 5:30 pm.

Chairman Eckles asked for any changes, corrections or additions to the September 21, 2021 minutes.

Motion to approve minutes.

Motion Camp. Second Parks  
Motion carried

Public Hearing Opened at 5:31pm

**The First Item of Business:** is Rezone Case #188, a request for a rezone of 140 Blaine St from B-3 (Highway Commercial District) to PCD (Planned Commercial District). The project encompasses ± 8.84 acres. The applicant is the City of Monroe and Staff recommends approval as submitted. Sadie Krawczyk, Economic Development Director for the City of Monroe, spoke on behalf of the project. Additionally, Bob Begle of Lord Aeck Sargent presented an overview of the Blaine Station Master Plan to the Planning Commission. One of the goals of the project was to create a mixed-use, walkable, destination location that is small in scale but not a copy of downtown. The concept also includes decentralized stormwater management—rain gardens, bioretention areas, swales—areas where water can be collected and filtered along the way.

Chairman Eckles asked for any questions—none

Chairman Eckles asked for any opposition—none

Public Hearing closed at 5:42 pm

Chairman Eckles entertained a motion.  
Motion to approve

Motion Parks. Second Treadaway.  
Motion Carried

The Public Hearing opened at 5:43pm

**The Second Item of Business:** is Zoning Code Text Amendment Case #204, for Zoning Code Text Amendment #12 to include modifying Section 630.3 Table 6—Industrial Zoning District Land Use Regulations to add as a conditional use under the principle use of Utility and area service provider facilities, private sewage facilities and modifying Section 650.4 Special Site Requirements for Planned Development Districts. The minimum area requirement for Planned Development Districts throughout the City and inside the Livable Cities Initiative (LCI) District shall be removed and the minimum frontage requirement for Planned Development Districts located in the LCI District shall be reduced. The applicant is the City of Monroe and Staff recommends approval as submitted.

Chairman Eckles asked for any questions:

Treadaway: What prompted the change in the Zoning Code?

Kelley: The City was approached to allow that use in the zoning classification and agreed it was an acceptable use for the zoning classification.

Chairman Eckles asked for any opposition—none

Public Hearing closed at 5:45 pm

Chairman Eckles entertained a motion.  
Motion to approve

Motion Treadaway. Second Parks.  
Motion Carried

Public Hearing opened at 5:45pm

**The Third Item of Business:** is Certificate of Appropriateness Case #233, a COA request for a replacement monument sign at the southeast corner of US Hwy 78 and Unisia Drive for Hitachi Automotive Systems Americas. The applicant is Jeannie Smith from Atlantic Sign & Graphics on behalf of the owner, Hitachi Automotive Systems Americas. Staff recommends approval as submitted without conditions.

Chairman Eckles asked for any questions—none

Chairman Eckles asked for any opposition—none

Public Hearing closed at 5:46 pm

Chairman Eckles entertained a motion.  
Motion to approve



Motion Sisk. Second Parks.  
Motion Carried

Public Hearing opened at 5:47pm

**The Fourth Item of Business:** is Certificate of Appropriateness Case #252, a COA request to allow construction of a commercial building containing a convenience store with fuel pumps and retail spaces at 1530 S Broad St. Staff recommends approval subject to the four conditions listed in the staff report. Clint Dixon spoke on behalf of the owner, PJF Leesburg, LLC. Dixon stated there would be 8100 sq ft of convenience store space with two outer retail spaces and five gas pumps for ten fueling stations. Dixon agreed to the four conditions listed in the staff report.

Chairman Eckles asked for any questions—Sisk: Are you intending to take up the entire property?

Dixon: We are looking at a phased development with the second phase being some type of fast food.

Treadaway: The future use section is undeveloped as well?

Dixon: Yes

Chairman Eckles asked for any opposition—none

Public Hearing closed at 5:50 pm

Chairman Eckles entertained a motion.  
Motion to approve with conditions

Motion Treadaway. Second Sisk.  
Motion Carried

The Public Hearing opened at 5:51pm

**The Fifth Item of Business:** is Certificate of Appropriateness Case #257, a COA request to allow construction of a commercial building with a convenience store and retail spaces. Staff recommends approval with the two conditions listed in the staff report. Shamsun Naher spoke on behalf of the owner, RALS Enterprise LLC.

Treadaway: Currently this driveway is a right in/right out?

Kelley: Yes and all of this is subject to DOT approval.

Logan Propes: I would like to add the condition that any alteration to the sidewalk along N. Broad St must be repaired exactly as it exists at the time of disturbance.

Kelley: This is in reference to the sidewalk project that was recently completed along N. Broad St.

Chairmen Eckles: You understand that there are now three conditions on the project?

Naher: Yes

Chairman Eckles asked for any questions—none

Chairman Eckles asked for any opposition—none

Public Hearing closed at 5:57 pm

Chairman Eckles entertained a motion.

Motion to approve with updated conditions

Motion Camp. Second Parks.

Motion Carried

Public Hearing opened at 5:58pm

**The Sixth Item of New Business** is Rezone Case #256, a request for a rezone of the southeast corner of the intersection of Double Springs Church Road and Cedar Ridge from R-1 to R-1A. The project encompasses ±83.072 acres. Staff recommends approval of the rezone subject to the seven conditions listed in the staff report. The applicant, Parkland Communities Inc spoke on behalf of the owner, Rowell Family Partnership & Still Family Realty LLC. Tyler Lasser of Alliance Engineering, representing Parkland Communities Inc, presented the project t to the Planning Commission. The project will include 141 lots broken into two phases—34 ranch houses with a minimum of 1800 sq ft and 107 two-story houses with a minimum of 2400 sq ft. The development will have a density of 1.69 units per acre. The smaller lots allowed in R-1A will permit the developer to cluster the lots and preserve more of the natural environment found on the site. Parkland Communities agrees with all of the conditions listed in the staff report.

Treadaway: What are the percentage of lots of the minimum size?

Lasser: Some will meet the standard but all of the two-story will be larger than that; not sure how many will be on the line of 10,000 sq ft

Kelley: You can modify the condition of a minimum of 1500 sq ft to accept their 1800 sq ft.

Sisk: Does the minimum 6 different layouts mean, 6 for the ranch houses and 6 for the two-story houses or 6 for the entire development?

Lasser: Our clients are willing to meeting any conditions related to exterior appearances.

Kelley: Since there are two separate sections of the development, you might stipulate having additional elevations for each section

Chairman Eckles: Has there been a recent traffic study done?

Lasser: It would be completed prior to the preliminary plat. We can make adjustments based on the traffic study if needed.

Kelley: A simple edit for the second condition is to say six building designs per each neighborhood presented on the concept plan.

Sisk: Do you intend on having a mailbox kiosk?

Lasser: Yes, at the front of the site near the amenity area and parking lot

Kelley: Cluster box units are now a requirement by the USPS rather than mailboxes at each home site.

Chairman Eckles asked for any opposition—yes

1. Jim Campbell—2580 Double Springs Church Road
  - a. A natural and less dense environment is a prime reason for living here; No one finds the dense development of Loganville and Snellville desirable; With the City of Monroe and Walton County there is a unique combination of a well-developed small town and rural environment
2. Amy Maughon—1735 Double Springs Church Road
  - a. Double Springs Church Road is made up of a variety of parcels from 5 to 100 acres; at any given time, there are people on horses or tractors and kids playing; this development in combination with the other proposed subdivision and the new shopping center will cause an increase in traffic
  - b. A traffic study will not be valid until the new shopping center is opened
  - c. Are the City and County working together to see how these developments impact both areas? Maintenance?
3. Kalen Vanderhorst—2116 Double Springs Church Road
  - a. The over 300 homes of River Pointe in combination with this development is too much growth too quickly
  - b. Are the roads going to be widened?
4. Janice Hawks—2301 Double Springs Church Road, 1965 Double Springs Church Road
  - a. Slowly losing peace and tranquility of the town—it’s why we moved here and we are losing it
  - b. The road has two blind curves—very dangerous; don’t need any more traffic; already a congested area with limited access points
5. Susan Tyre—1950 Double Springs Church Road
  - a. Provided a visual aid for the Planning Commission highlighting the blind curves
  - b. How does this impact water and sewer demand? What measures are in place to maintain adequate fire protection and water pressure?
  - c. Would the developer consider few homes on larger lots?
6. Frank Masiello—1710 Double Springs Church Road
  - a. Where are kids going to go to school; schools will become overcrowded and need portable classrooms
  - b. How will the subdivision impact the natural streams and creeks? Lost most of his water in the creek when the Morgan’s Crossing subdivision was built; will the groundwater remain safe?
  - c. What are the plans and cost of infrastructure that is needed? Water lines, sewer lines because the lots aren’t big enough for septic tanks, fire protection?
  - d. City and County could go in together to purchase the land and turn it into a park.
7. Todd Mitchell—2260 Double Springs Church Road
  - a. Monroe is now unique and desirable; a great place to live

- b. If this gets approved there could be a domino effect; need to keep high density inside the core of the City

Planning Commission members further discussed the proposal amongst themselves. Chairmen Eckles suggested tabling the motion until a traffic study could be completed that included traffic from the almost completed Monroe Pavilion shopping development.

Treadaway: How long does a traffic study take?

Kelley: They take varying amounts of time depending on the scope.

Public Hearing closed at 6:37pm

Callender: To your concern about requiring a specific traffic study prior to the rezone hearing, you need to be very specific about what you are looking for. If you refer to the conditions listed on the staff report, if the rezone is approved, a traffic study would be done before they submit a preliminary plat to identify offsite improvements and impact areas outside the development. That condition is followed by a development agreement with the City of Monroe. If you require a traffic study now, you may not be able to condition the developer to assist with offsite improvements.

Chairman Eckles: What do you recommend?

Callender: If you approve it, to approve it with the seven conditions listed in the staff report

Kelley: If you make a motion to table it, remove the traffic study as a condition

Parks: Where is this development in relation to the one with 300 homes?

Kelley: Within a quarter mile

Sisk: Will both projects have City of Monroe utilities?

Kelley: It depends on service area, but yes I believe they are

Chairman Eckles entertained a motion.

Motion to table until December 21, 2021

Motion Camp. Second Treadaway.  
Motion Carried

Old Business—none

New Business—none

Chairman Eckles entertained a motion to adjourn.

Motion to adjourn

Motion Parks. Second Treadaway  
Meeting adjourned at 6:42pm

Historic Preservation Commission  
Meeting Minutes  
Regular Meeting—October 26, 2021

Present: Mitch Alligood, Jane Camp, Fay Brassie, Elizabeth Jones, Susan Brown

Absent: None

Staff: Patrick Kelley, Director of Code

Visitors: Ramsey Ray, Rita Dickenson, Matthew Jones, Shawn & Heather Roseland, Antonio Granados, Kevin Hess, Wendy Cooper

Meeting called to order at 6:00 P.M.

Chairman Alligood asked if there were any changes or corrections to the previous months' minutes. To approve as submitted.

Motion by Brassie. Second by Brown  
Motion carried.

**The First Item of Business:** Request for COA #313, a request for exterior changes including porches, siding, windows, and roof materials at 511 S Madison Ave. The applicant, Matthew Jones, owner of said property, spoke on behalf of the project. He would like to keep the aesthetics and feel of the house the same. The windows need replacing and the porch's metal roof and brick columns need repair. The staircases leading to the house also need to be replaced. The brick on the house is currently painted green and he would like to add a smear to the brick and possibly paint it gray.

Commissioner Jones requested each item be discussed separately. Chairman Alligood asked what kind of windows would be used. Matthew Jones replied 2/2. Brassie stated their main concern was consistency and Matthew Jones confirmed all of the windows would be the same. Brown commented her mother grew up in that house and that the existing 2/1 windows are original. Matthew Jones agreed to putting in 2/1 windows.

Matthew Jones is also going to restore the original door and replace the glass in the transom window. In reference to the porches, Matthew Jones stated If the brick posts are repairable, they will be fixed. The brick staircases will be repaired with new brick where needed.

Commissioner Jones stated there is not a precedent for brick smear in the area. It would be adding a decorative treatment that was not there originally. Brassie suggested just painting the brick. Matthew Jones agreed to just paint the foundation and replace bricks as needed. In regards to the siding, Matthew Jones asked to replace the siding on the rear of the house with Hardieplank and use the rear siding to replace rotten boards around the rest of the exterior.

Chairman Alligood asked if there were any questions from the public: none

To approve as presented

Motion by Brassie, Seconded by Camp  
Motion carried

**The Second Item of Business:** Request for COA #314, a request to add a greenhouse addition to an accessory structure at 602 E Church St. The applicant, Rita Dickenson, on behalf of Monroe Country Day School, spoke in favor of the project. On the property, behind the school, is a cinder block building built by the Boy Scouts in the 1950s. Dickenson would like to build a greenhouse/outdoor classroom on the back of the cinder block building. The addition would extend towards Davis Street. The roof would match the existing roof and would be hidden from view (Church Street).

Chairman Alligood asked if there were any questions: None

Chairman Alligood asked if there were any public comments: none

To approve as submitted

Motion by Brassie. Second by Jones  
Motion carried

**The Third Item of Business:** Request for COA #315, a request for a fence at 249 Boulevard. The applicant Christopher Ray, owner of said property, spoke on behalf of the project. Ray is requesting a fence in the rear of the property to keep his dogs in the yard.

Chairman Alligood asked if there were any public comments: none

To approve as presented

Motion by Jones. Second by Brassie  
Motion carried

**The Fourth Item of Business:** Request for COA #312, a request for installing a fence and gutters, removing the existing carport, and adding a detached garage at 615 E Church St. The applicants Shawn and Heather Roseland, owners of said property, spoke in favor of the project. Shawn Roseland explained they would like add a rear fence in an open picket style to contain their dogs, install gutters along the side and back of the house, and enclose the carport to make a garage.

Brassie expressed concern regarding the location of the garage. She feels bringing it that far forward would close off the rear of the house. Ray stated they wanted to bring the garage forward to create a courtyard and more useable space in the backyard. Currently, the backyard is mostly taken up by the driveway. The garage would mimic the style of the house and current carport/carriage house. Ray agreed not to place the garage past the first rear projection of the house so that the garage does not hide the U shape of the rear of the house.

Ray amended his application to include a request to build a covered walkway/portico between the new garage and the house.

Chairman Alligood asked if there were any public comments: None

To approve with the amendment:

Motion by Camp. Second by Brassie  
Motion carried

**The Fifth Item of Business:** Request for COA #317, a new wall sign for the restaurant Tacos N Beer at 116 N. Broad St. The applicant is Antonio Granados, owner of the restaurant.

Chairmen Alligood noted his one concern that the sign on the building resembled a marijuana leaf. Granados offered to remove the leaf and replace it with something else. He showed the Commission an alternate sign design.

Brassie suggested due to the architectural features of the building, a taller narrower sign might look better on the building. Granados noted the alternative design he showed the Commission Members was narrower than the proposed sign.

To approve the alternative sign

Motion by Jones. Second by Brown  
Motion carried

Old Business

**The First Item of Old Business:** Historic Survey Update by Jones: Myself, Crista, Laura, and Sadie met with WLA Studios for a kickoff meeting. There will be a letter given to homeowners that explained the project.

**The Second Item of Old Business:** Drafting a letter that can be sent to property owners who are in violation of the historic preservation ordinance.

New Business: Citizen Question: What protection is there against houses being torn down in the Historic District, particularly those along Church Street?

Chairman Alligood: All requests for demolition have to go before the Commission. If a demolition request is denied, the applicant can appeal to City Council.

Chairman Alligood entertained a motion to adjourn.

Motion by Jones. Second by Brassie  
Motion carried. Adjourned at 6:52 pm



**Downtown Development Authority**

**MINUTES**

**Thursday, September 09, 2021**

**8:00 AM**

**City Hall - 215 N. Broad Street**

**CALL TO ORDER**

Meeting was called to order at 8:03 am.

**ROLL CALL**

**PRESENT**

- Chairman Lisa Anderson
- Secretary Andrea Gray (via conference call)
- Board Member Whit Holder
- Board Member Wesley Sisk
- City Council Representative Ross Bradley
- Board Member Chris Collin

**ABSENT**

- Vice Chair Meredith Malcom
- Board Member Charles Sanders

**CITY STAFF**

- Les Russell
- Sadie Krawczyk

**APPROVAL OF PREVIOUS MEETING MINUTES**

- . DDA August Minutes

Approved - Motion made by Board Member Holder, Seconded by Board Member Sisk.  
 Voting Yea: Chairman Anderson, Secretary Gray, Board Member Holder, Board Member Sisk,  
 City Council Representative Bradley, Board Member Collin



**APPROVAL OF FINANCIAL STATEMENTS**

. DDA July Financials

Approved - Motion made by Board Member Sisk, Seconded by Board Member Holder.  
Voting Yea: Chairman Anderson, Secretary Gray, Board Member Holder, Board Member Sisk,  
City Council Representative Bradley, Board Member Collin

**PUBLIC FORUM**

David Dickinson was present to discuss ideas for the Bicentennial 5K on October 9th. He is serving as the race chairman and stated the need for 10+ volunteers for the race due to its many turns.

**CITY UPDATE**

The Blaine Station PCD will be before Planning & Zoning and City Council in the coming months; the update to Monroe's Historic Survey will be underway soon; RFP for a Comprehensive Planning Firm is posted at this time

None.

**COMMUNITY WORK PLAN &REPORTS**

**Strategy #1 Downtown Design - murals update, pocket park refresh**

An update on cameras/signage for the hammock park was also discussed.

**Strategy #2 Redevelopment - Contract Extension for N. Jackson property**

A new leak within the Milner-Aycock building was noted; we now have keys to the building.

**Strategy #3 Entertainment Draws - pirate day; Javianne Oliver parade and ceremony; Bicentennial 5K on Fall Fest day (volunteers needed)**

**PROGRAMS**

**Farmers Market**

**Farm to Table committee meeting 9/9, event planned for 11/7**

**FUNDING**

**SPONSORSHIP**

**FACADE GRANTS - none**

**COMMUNITY EVENT GRANTS - none**

**NEW BUSINESS**

. Contract Amendment - 109 S. Jackson Street

Approved - Motion made by Board Member Sisk, Seconded by City Council Representative Bradley.

Voting Yea: Chairman Anderson, Secretary Gray, Board Member Holder, Board Member Sisk, City Council Representative Bradley, Board Member Collin

**ANNOUNCEMENTS:**

Next meeting scheduled, October 14th, at 8:00 am at Monroe City Hall.

Georgia Downtown Association Winners to be recognized at City Council meeting on 9/14/21 at 6:00 pm.

**ADJOURN**

Motion made by City Council Representative Bradley, Seconded by Board Member Sisk.

Voting Yea: Chairman Anderson, Secretary Gray, Board Member Holder, Board Member Sisk, City Council Representative Bradley, Board Member Collin



**Convention and Visitors Bureau**

**MINUTES**

**Thursday, September 09, 2021**

**9:00 AM**

**City Hall - 215 N. Broad Street**

**CALL TO ORDER**

Meeting called to order at 9:00 am.

**ROLL CALL**

**PRESENT**

- Chairman Lisa Anderson
- Secretary Andrea Gray (via conference call)
- Board Member Whit Holder
- Board Member Wesley Sisk
- City Council Representative Ross Bradley
- Board Member Chris Collin

**ABSENT**

- Vice Chairman Meredith Malcom
- Board Member Charles Sanders

**CITY STAFF**

- Sadie Krawczyk

**APPROVAL OF EXCUSED ABSENCES**

**APPROVAL OF MINUTES FROM PREVIOUS MEETING**

- . CVB August Minutes

Approved - Motion made by City Council Representative Bradley, Seconded by Board Member Sisk.

Voting Yea: Chairman Anderson, Secretary Gray, Board Member Holder, Board Member Sisk,

City Council Representative Bradley, Board Member Collin

**APPROVAL OF CURRENT FINANCIAL STATEMENTS**

. CVB July Financials

Approved - Motion made by City Council Representative Bradley, Seconded by Board Member Holder.

Voting Yea: Chairman Anderson, Secretary Gray, Board Member Holder, Board Member Sisk, City Council Representative Bradley, Board Member Collin

**Chairman's Report**

None.

**Director's Report - Tripadvisor Ads being created; hotel activity update**

**OLD BUSINESS**

TV Commercial still running

**NEW BUSINESS**

. Bicentennial Celebration Week

**ANNOUNCEMENTS**

Next meeting will be October 14, 2021 at Monroe City Hall

**ADJOURN**

Motion made by City Council Representative Bradley, Seconded by Board Member Collin.

Voting Yea: Chairman Anderson, Secretary Gray, Board Member Holder, Board Member Sisk, City Council Representative Bradley, Board Member Collin



**To:** Planning and Zoning / City Council  
**From:** Patrick Kelley  
**Department:** Planning, Zoning, Code and Development  
**Date:** 10-08-2021  
**Description:** Rezone B-3 to PCD (Planned Commercial District) at 140 Blaine Street, City of Monroe Redevelopment project.

**Budget Account/Project Name:** NA

**Funding Source:** 2021 NA

**Budget Allocation:** NA

**Budget Available:** NA

**Requested Expense:** \$NA **Company of Purchase:** NA

**Recommendation:** Staff recommends approval of this rezone request.

**Background:** This is a redevelopment project of a defunct shopping plaza by the City of Monroe to be executed per the Blain Street Master Plan. It currently houses the recently renovated Municipal Court and the Police Department.

**Attachment(s):** Staff Report, Application, zoning notification letter, Master Plan draft



**Planning  
City of Monroe, Georgia  
REZONE STAFF REPORT**

---

**APPLICATION SUMMARY**

**REZONE CASE #:** 188

**DATE:** October 8, 2021

**STAFF REPORT BY:** Brad Callender, City Planner

**APPLICANT NAME:** City of Monroe

**PROPERTY OWNER:** City of Monroe

**LOCATION:** North side of E Spring Street, east side of Blaine Street, south and west sides of Hammond Drive – 140 Blaine Street

**ACREAGE:** ±8.84

**EXISTING ZONING:** B-3 (Highway Commercial District)

**EXISTING LAND USE:** City of Monroe Police Station, shopping center and associated parking

**ACTION REQUESTED:** Rezone B-3 to PCD (Planned Commercial District)

**REQUEST SUMMARY:** The City of Monroe is rezoning property as part of the redevelopment of the old Walton Plaza shopping center.

**STAFF RECOMMENDATION:** Staff recommends approval of this rezone request.

**DATES OF SCHEDULED PUBLIC HEARINGS**

**PLANNING COMMISSION:** October 19, 2021

**CITY COUNCIL:** November 9, 2021

---

**STAFF RECOMMENDATION**

Based upon the City Council’s policies, decision making criteria and standards outlined in the Zoning Ordinance of the City of Monroe, staff fully supports the rezoning and redevelopment of the subject property as a Planned Commercial District and recommends the rezoning be approved as presented in the Blaine Street Master Plan.



# City of Monroe

215 N. Broad Street  
Monroe, GA 30655  
(770) 207-4674

## REZONE PERMIT

PERMIT #:	188	DESCRIPTION:	REZONING 8.84 acres B-3 to PCD
JOB ADDRESS:	140 BLAINE ST	LOT #:	
PARCEL ID:		BLK #:	
SUBDIVISION:		ZONING:	
ISSUED TO:	CITY OF MONROE	CONTRACTOR:	CITY OF MONROE
ADDRESS:	P.O. BOX 1249	ADDRESS:	P.O. BOX 1249
CITY, STATE ZIP:	MONROE GA 30655	CITY, STATE ZIP:	MONROE GA 30655
PHONE:		PHONE:	
PROP. USE VALUATION:	\$ 1.00	DATE ISSUED:	8/31/2021
SQ FT:	0.00	EXPIRATION:	2/27/2022
OCCP TYPE:		PERMIT STATUS:	O
CNST TYPE:		# OF BEDROOMS:	
INSPECTION REQUESTS:	770-207-4674 dadkinson@monroega.gov	# OF BATHROOMS:	
		# OF OTHER ROOMS:	

FEE CODE	DESCRIPTION	AMOUNT
PZ-02	COMM-OTHER REZONE/VARIANCE	\$ 0.00
<b>FEE TOTAL</b>		\$ 0.00
<b>PAYMENTS</b>		\$ 0.00
<b>BALANCE</b>		\$ 0.00


**NOTES:**

This application will be heard by the Planning Commission on 10/19/2021 at 5:30pm and by City Council on 10/12/2021 at 6:00pm. Both meetings will be held at City Hall located at 215 N. Broad St. Monroe, GA 30655

**NOTICE**

THIS PERMIT BECOMES NULL AND VOID IF WORK OR CONSTRUCTION AUTHORIZED IS NOT COMMENCED WITHIN 6 MONTHS, OR IF CONSTRUCTION OR WORK IS SUSPENDED OR ABANDONED FOR A PERIOD OF 6 MONTHS AT ANY TIME AFTER WORK IS STARTED.

I HEREBY CERTIFY THAT I HAVE READ AND EXAMINED THIS DOCUMENT AND KNOW THE SAME TO BE TRUE AND CORRECT. ALL PROVISIONS OF LAWS AND ORDINANCES GOVERNING THIS TYPE OF WORK WILL BE COMPLIED WITH WHETHER SPECIFIED HEREIN OR NOT. GRANTING OF A PERMIT DOES NOT PRESUME TO GIVE AUTHORITY TO VIOLATE OR CANCEL THE PROVISION OF ANY OTHER STATE OR LOCAL LAW REGULATING CONSTRUCTION OR THE PERFORMANCE OF CONSTRUCTION.

  
\_\_\_\_\_  
(APPROVED BY)

10/11/2021  
\_\_\_\_\_  
DATE



CODE DEPARTMENT

October 4, 2021

To Whom It May Concern:

Be advised that a public hearing before the Planning and Commission is scheduled for October 19, 2021 to consider an application for rezoning 8.84 acres located at 140 Blaine St Monroe, GA 30655. The property is currently zoned B-3 with a request to change the zoning classification to Planned Commercial District (PCD). As an adjacent property owner, you are officially being notified of this request. Further notice of this request will appear in the Walton Tribune on October 3, 2021.

All public hearings will be held in the Council Chambers located at City Hall—215 N. Broad St Monroe, GA 30655. Public hearings regarding the rezone request for 140 Blaine St will be as follows:

- Planning Commission—October 19, 2021 at 5:30pm
- City Council—November 16, 2021 at 6:00pm

You are welcome to speak for or against this application during the public hearings; however, your attendance is not required. One week prior to the Planning Commission meeting, copies of the application submittal will be available for viewing online at [www.monroega.com](http://www.monroega.com) by selecting calendar and the date of the meeting you plan to attend for this application.

If you have any questions regarding this letter, please call the City of Monroe Code Department at 770-207-4674.

Sincerely,

Laura Wilson  
Code Department Assistant



**NOTICE TO THE PUBLIC  
CITY OF MONROE**

**A petition has been filed with the  
City of Monroe requesting the  
property at 140 Blaine St to  
be rezoned from B3 to PCD.**

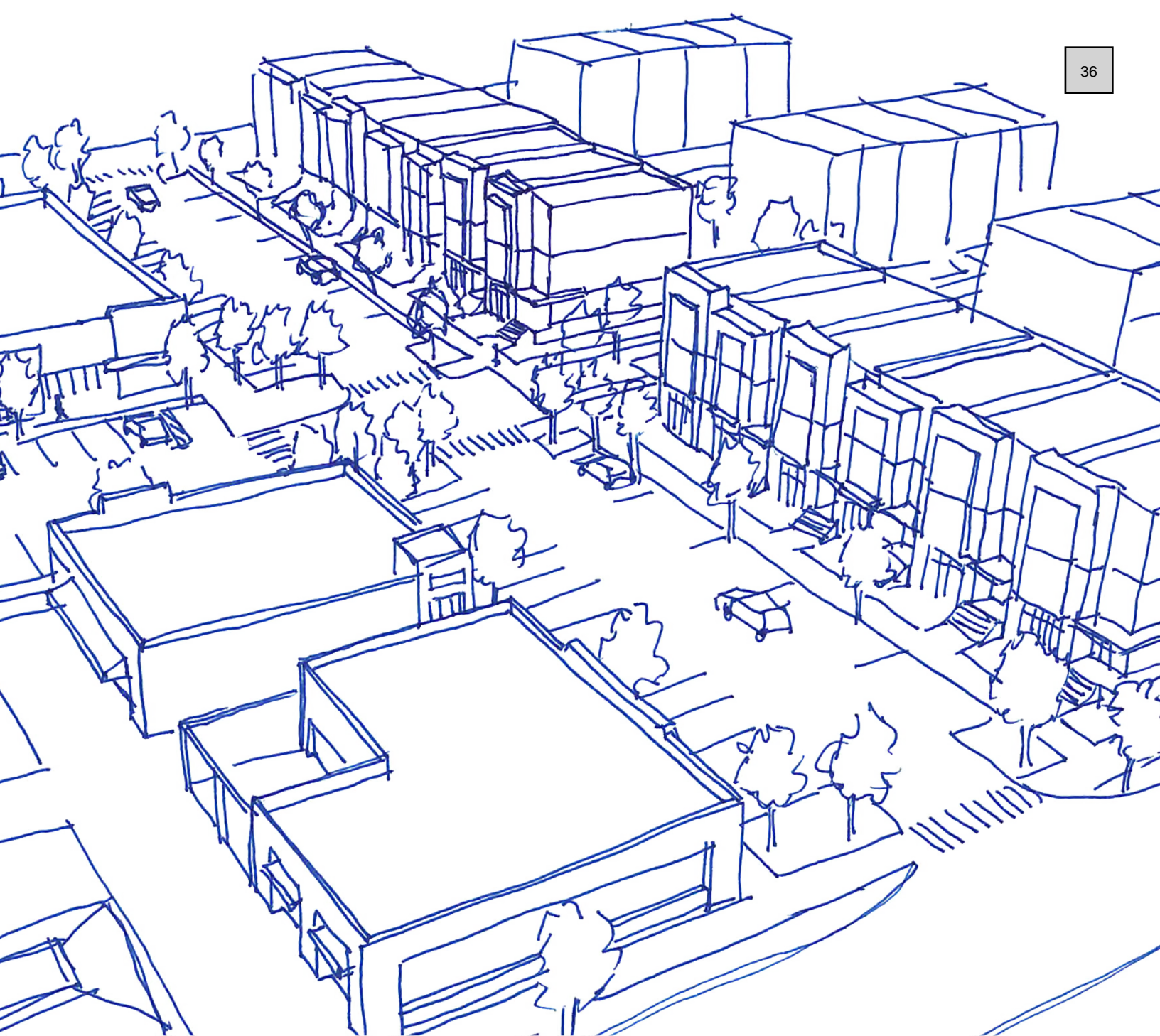
**A public hearing will be held before  
the Monroe Planning Commission at  
City Hall Auditorium at  
215 N. Broad Street on October 19, 2021  
at 5:30 P.M. All those having an  
interest should be present to voice  
their interest.**

**A petition has been filed with the  
City of Monroe requesting the  
property at 140 Blaine St to  
be rezoned from B3 to PCD.**

**A public hearing will be held before  
The Mayor and City Council  
at the City Hall Auditorium at  
215 N. Broad Street on November 9, 2021  
at 6:00 P.M. All those having an  
interest should be present to voice  
their interest.**

**PLEASE RUN ON THE  
FOLLOWING DATE:**

**October 3, 2021**



BLAINE

# STATION

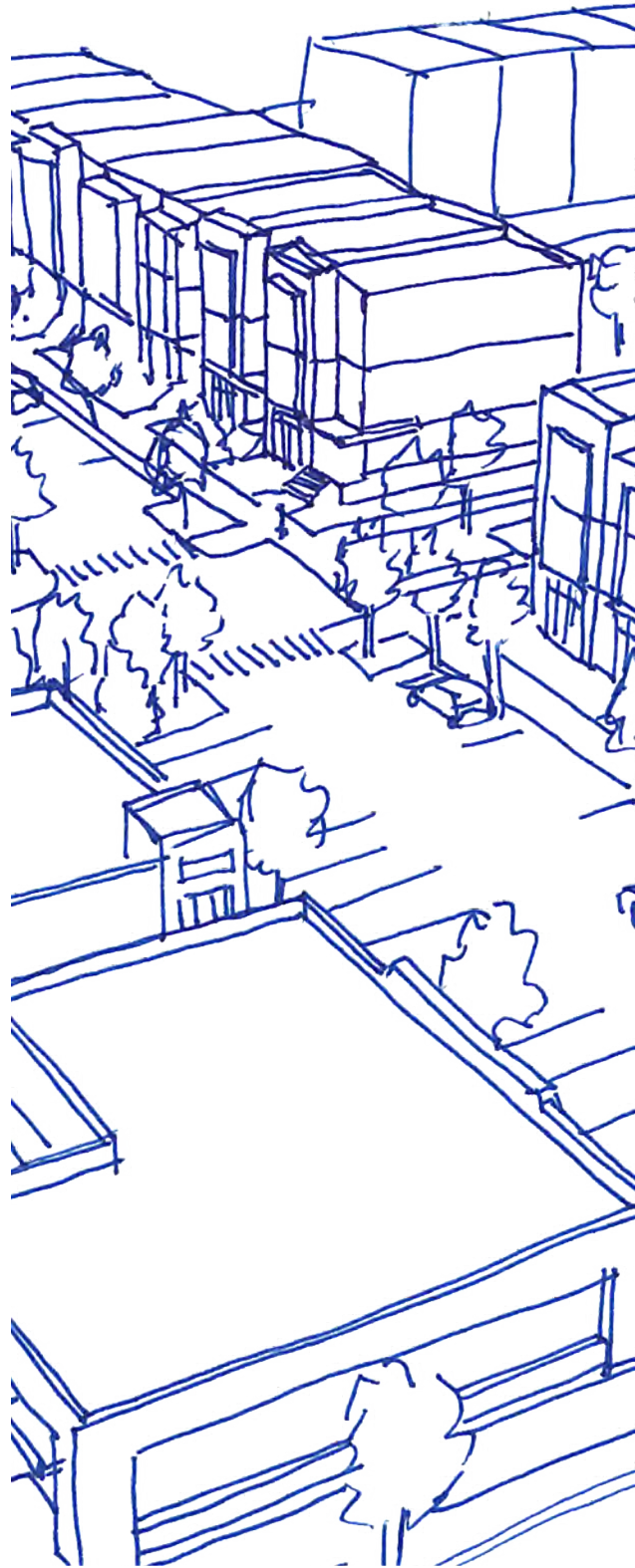
MASTER PLAN

OCTOBER X, 2021

**DRAFT FOR REVIEW ONLY**



LORD  
AECK  
SARGENT



## City of Monroe Project Team

Logan Propes, City Administrator

Chris Bailey, Assistant City Administrator

Sadie Krawczyk, Economic Development Director

Brad Callender, AICP CNU-A, City Planner

## Lord Aeck Sargent

Robert Begle, Principal Urban Designer

Travis Ridenbaugh, Mixed-use architect

Julia Doolittle, Urban Designer and Landscape Designer

- 1** CHAPTER 1: Context + Overview
- 2** CHAPTER 2: Development Concept
- 3** CHAPTER 3: Development Controls
- 4** CHAPTER 4: Streetscape Standards
- 5** CHAPTER 5: Design Features

## PROJECT OVERVIEW

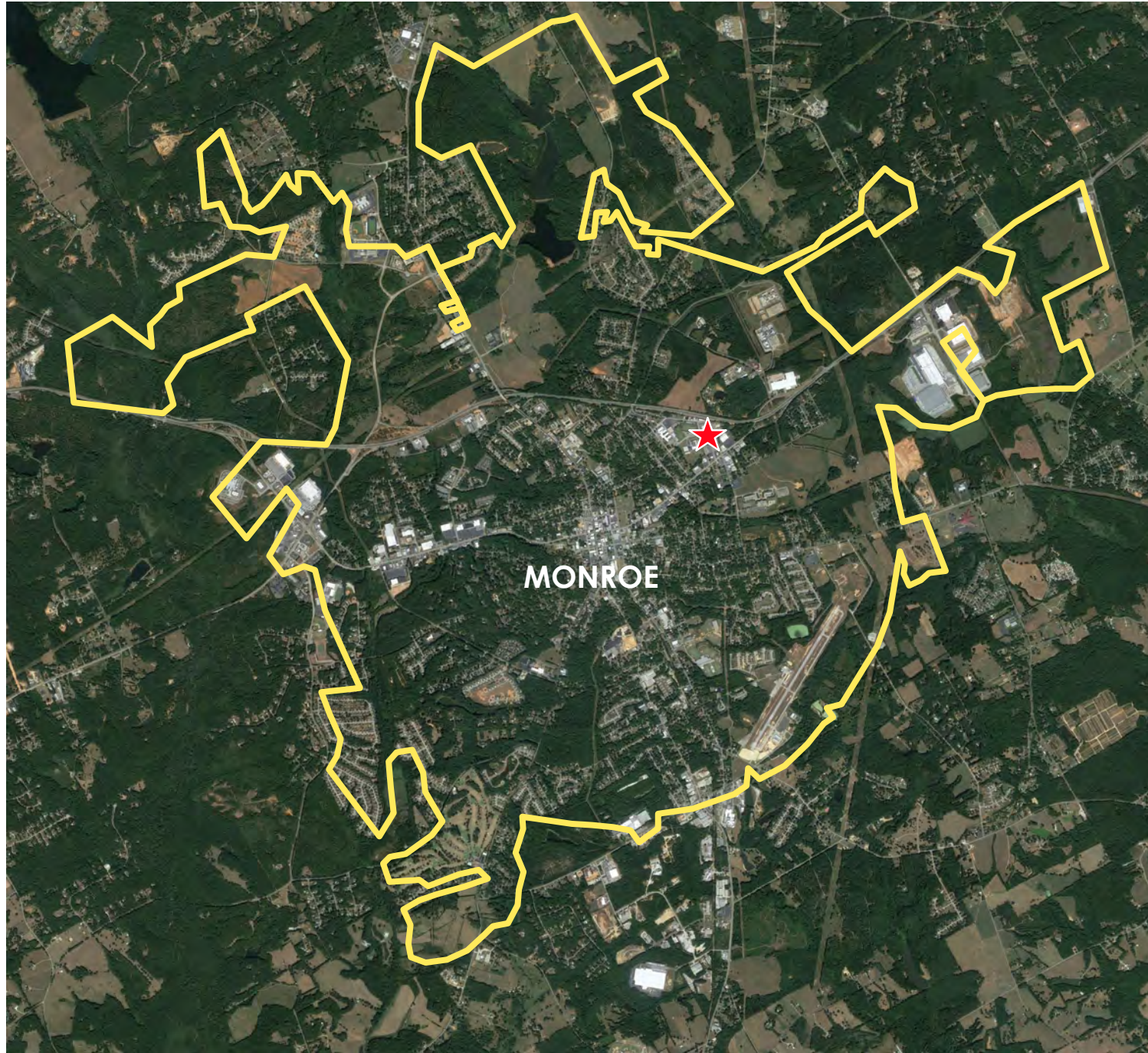
This Blaine Station Master Plan is a development study of 140 Blaine Street, located on the east side of Monroe, Ga. As a city-owned property, the future development of this site can be proactively dictated in a manner that sets a tone for new compatible development on the east side and throughout the City as a whole. This study is intended to convey a vision of a walkable, mixed-use district that serves as a destination. The vision includes stand-alone retail, restaurants and other commercial in small format settings. Commercial uses are supplemented with small public shared open space and adjacent residential development. The open spaces are intended to be flexible in layout and design so as to accommodate a wide variety of programmed and ad-hoc events on a daily, weekly and/or yearly basis.

This report is divided into several sections including: Context, Development Concept, Development Controls, Streetscape Standards and Design Features. The Development Controls section is intended to be formally regulated through the use of site-specific Planned Unit Development zoning. The Design Features are intended to provide a guide for the desired character of the district but are not regulatory.

**1** CHAPTER 1  
CONTEXT + OVERVIEW



# CONTEXT

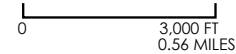


## KEY

- ★ Site- 140 Blaine St
- City of Monroe

## SITE DISTANCE TO:

- Bethlehem 9.9 miles
- Walnut Grove 10.6 miles
- Social Circle 11.1 miles
- Loganville 12.6 miles
- Winder 14.5 miles
- Snellville 20.5 miles
- Covington 20.8 miles
- Athens 25.7 miles



# EAST MONROE



## KEY PLAN

- Site- 140 Blaine St
- ★ Points of Interest

## SITE DISTANCE TO:

- Downtown Monroe 1.0 mile





# EXISTING SITE



The current site is underutilized consisting of mainly vacant building space and surface parking. The north portion of the existing building has recently been renovated and will house the City of Monroe police department, municipal court, and utility/infrastructure. The remainder of the existing building is vacant and in need of repairs and renovations.

In the effort to limit the amount of parking developed on-site and to avoid creating large surface parking lots, individual agreements could be negotiated with adjacent property owners to provide off-peak shared parking, particularly during Court hours/days and evenings/weekends where parking will be in high demand.



View of Existing Building Looking North



View of Existing Surface Parking Lot Looking South



View of Rear Side of Existing Building



View of Neighboring Development Behind the North End of the Existing Building



View of Renovated City of Monroe Building



**2** CHAPTER 2  
DEVELOPMENT  
CONCEPT

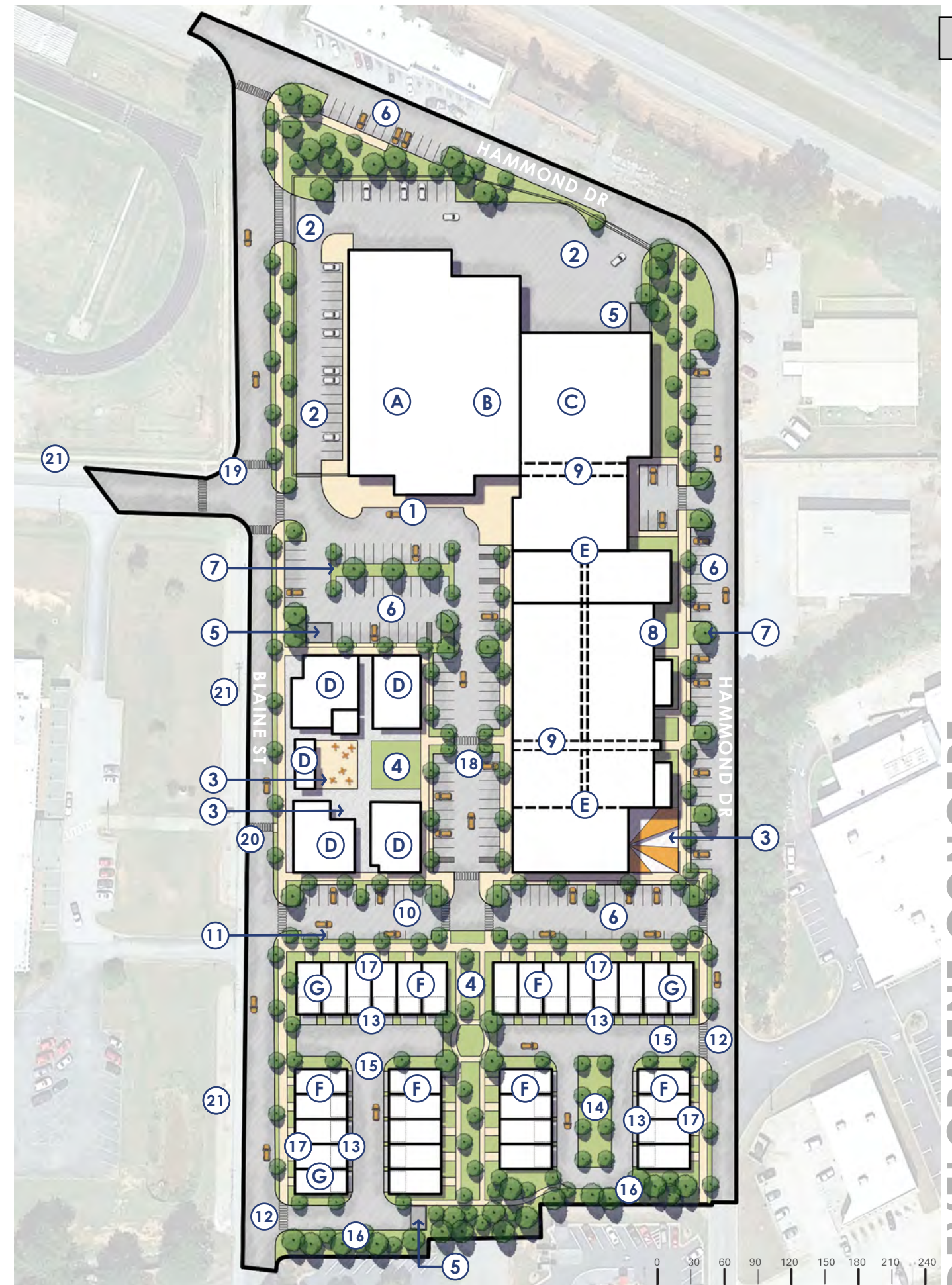
# DEVELOPMENT CONCEPT PLAN

## BUILDING USES

- (A) Existing City of Monroe Police
- (B) Existing City of Monroe Municipal Court
- (C) Existing City of Monroe Utility/ Infrastructure
- (D) New Commercial/Retail/ Mixed-Use
- (E) Commercial Rehab of Existing Building
- (F) Residential (Rear-Loaded Parking Underneath)
- (G) Potential Live-Work Units

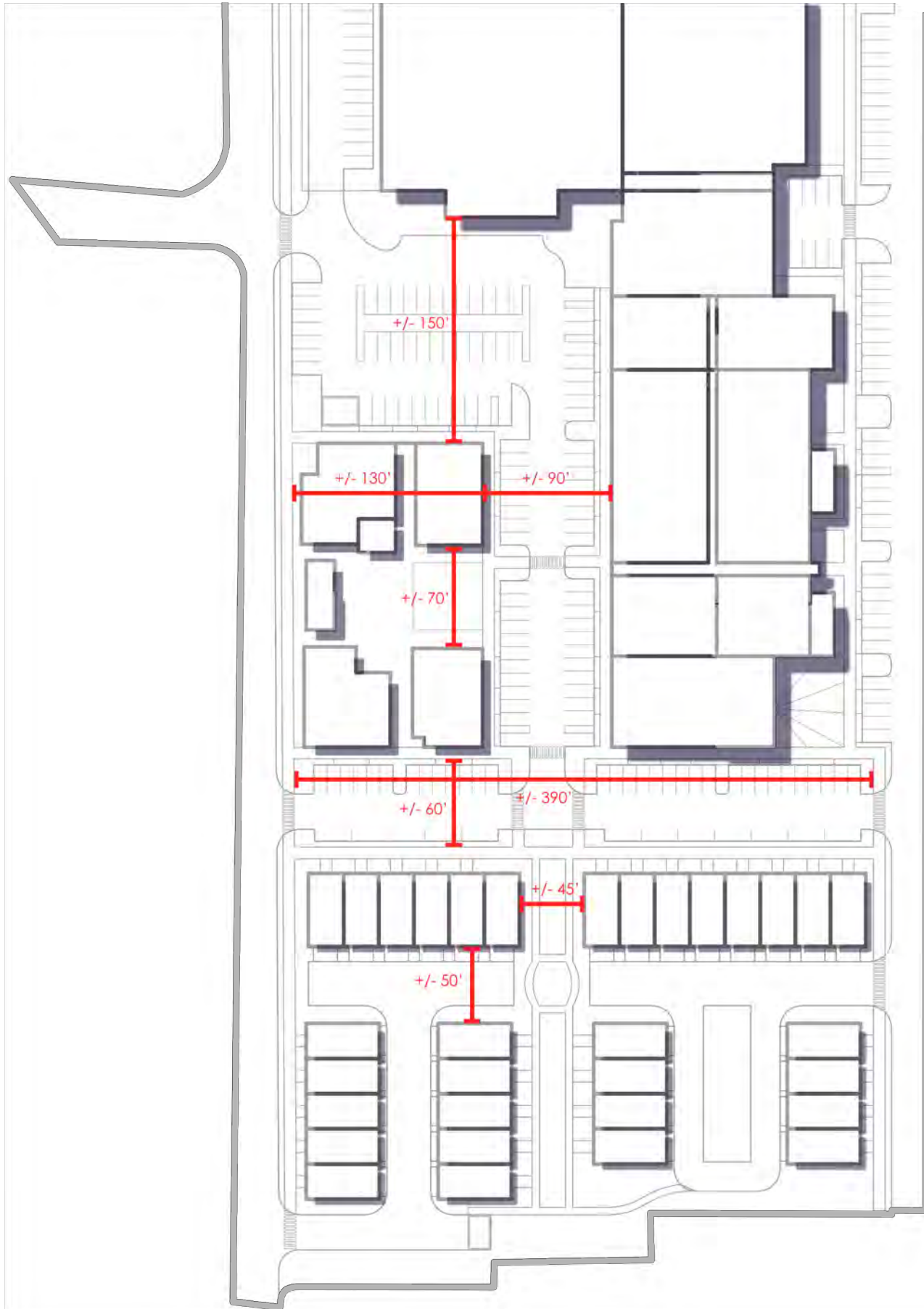
## DESIGN ELEMENTS

- (1) Ride Share Drop-off Lane
- (2) Gated Service Area (No Public Access)
- (3) Potential Outdoor Dining Location
- (4) Shared Open Space
- (5) Potential Dumpster Location
- (6) New Head in Public Parking (Typ.)
- (7) Landscape Islands (Typ.)
- (8) Subdivide Existing Building to Create Tenant Spaces/Front Doors Oriented to Hammond Street
- (9) New Internal Service Corridor (location may vary)
- (10) New Cross Street- Connects Hammond St. And Blaine St.
- (11) Parallel Parking on South Side of New Street
- (12) Residential Parking Access From Hammond St. And Blaine St. Only
- (13) Rear-Loaded Tuck-Under/ Garage Parking
- (14) Potential Location for Stormwater Management
- (15) Rear Access Alley for Residential Units Only
- (16) 10' Landscape Buffer
- (17) Stoops/ Front Doors of Residential Units (buildings must follow this orientation)
- (18) Mid-Block Pedestrian Connections (locations may vary)
- (19) New Pedestrian Crosswalks on Blaine St
- (20) Existing Mid-Block Crossing
- (21) Existing On-Street Parking

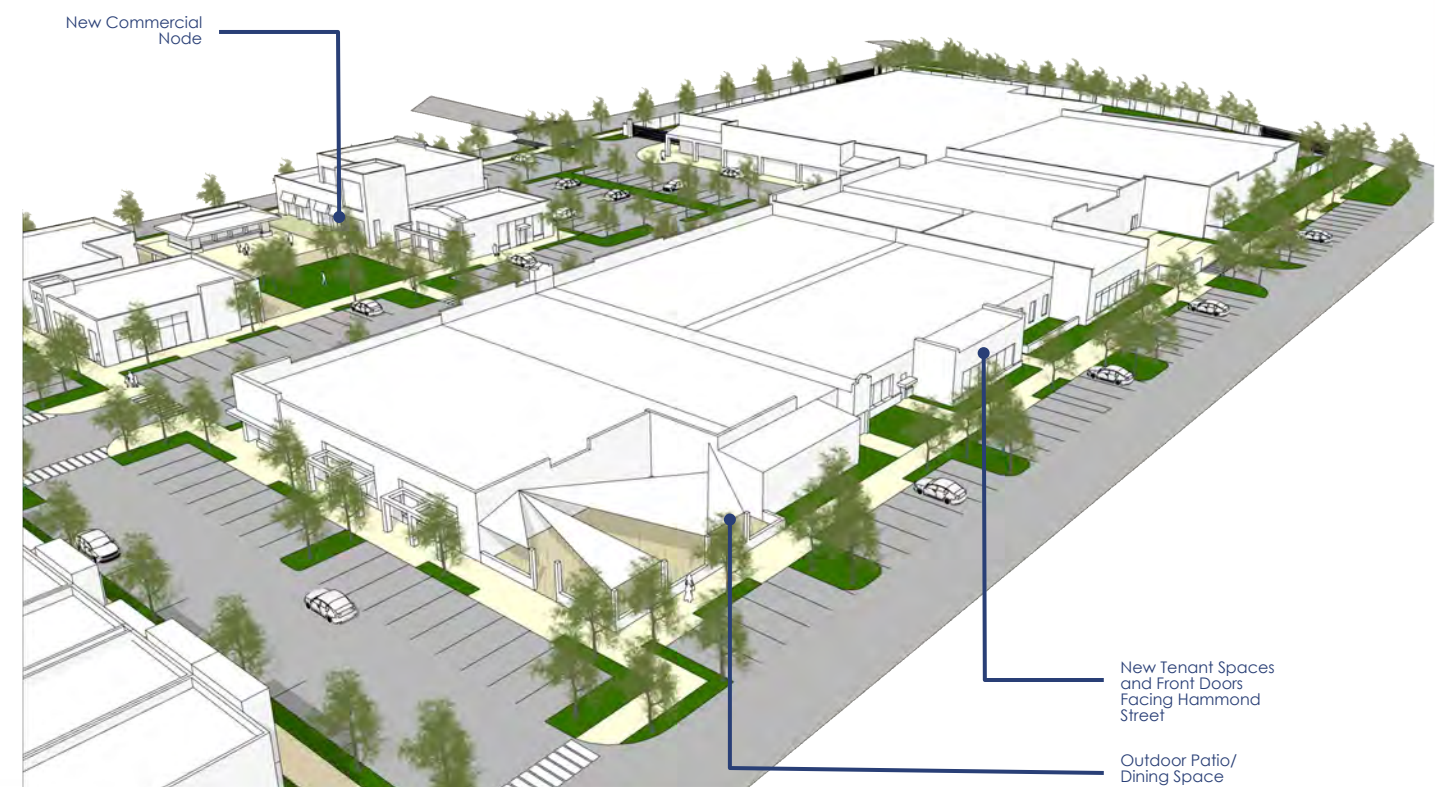
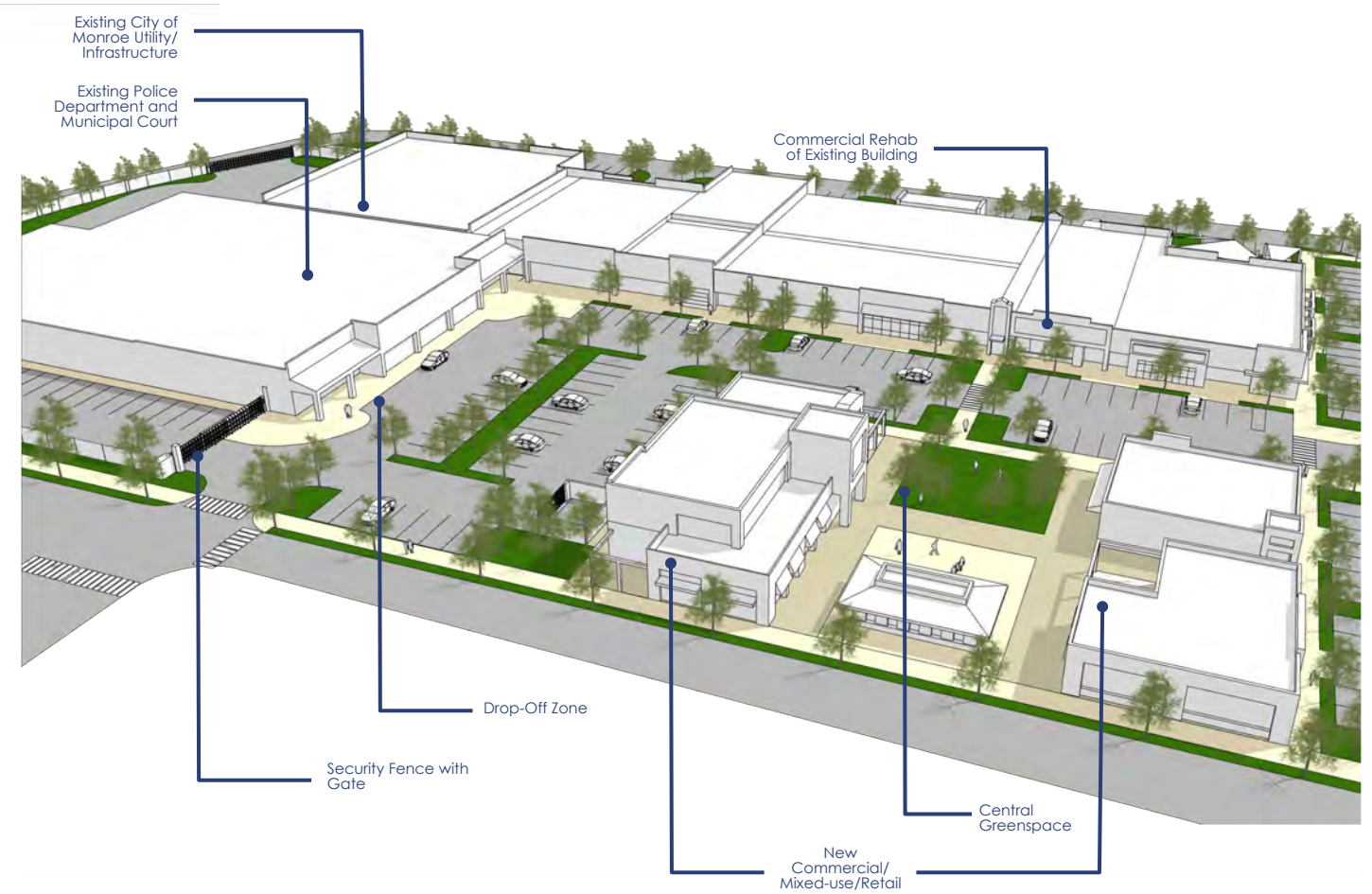




# CONCEPT DIMENSIONS



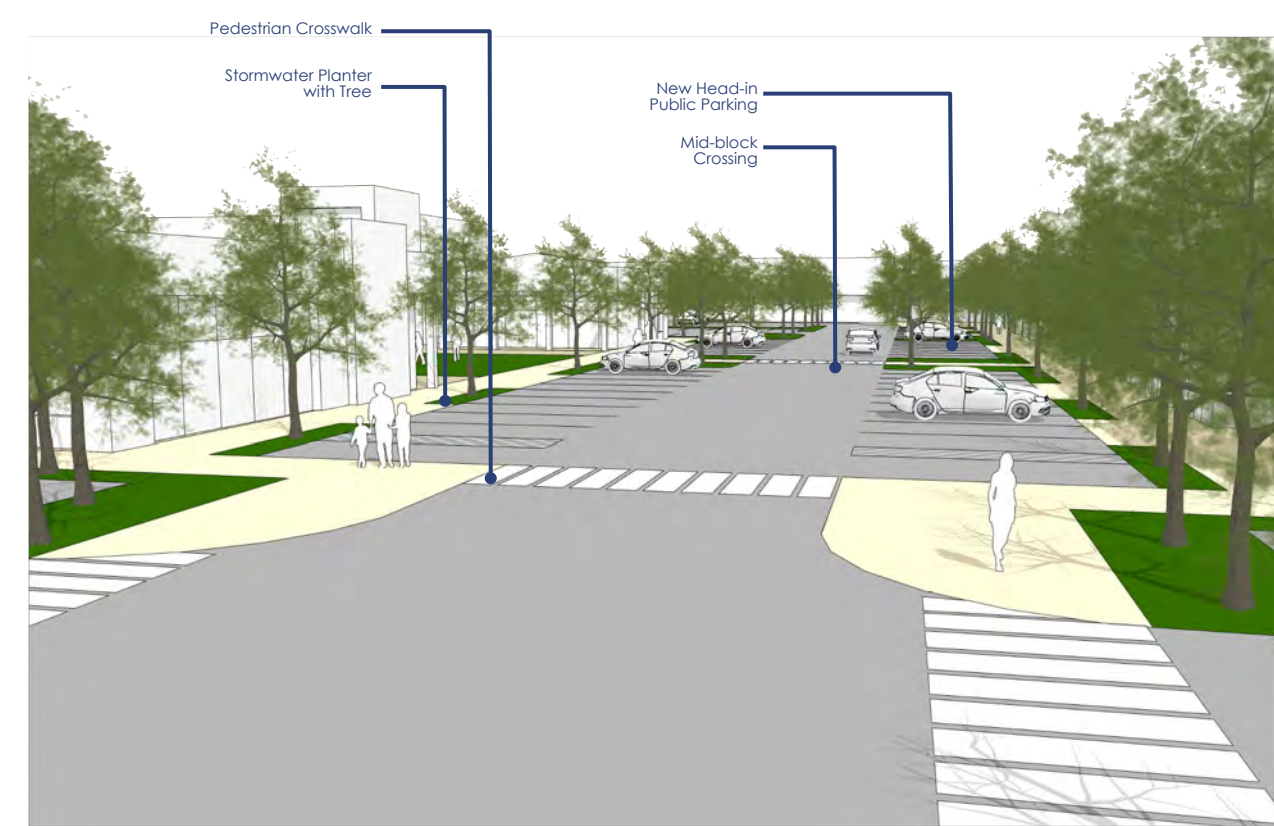
# 3D SITE MODEL



Development Concept is conceptual only, is not engineered and is not intended to convey specific architecture.

DEVELOPMENT CONCEPT

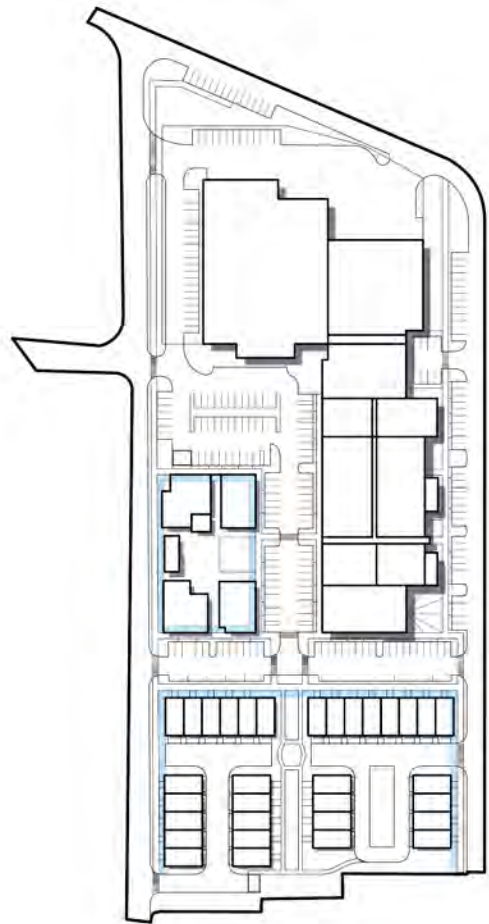




DEVELOPMENT CONCEPT

**3** CHAPTER 3  
DEVELOPMENT  
CONTROLS





## BUILD-TO-ZONE

-0-10' zone adjacent to all primary sidewalks

-Building facade must be within this zone



## SIDEWALKS

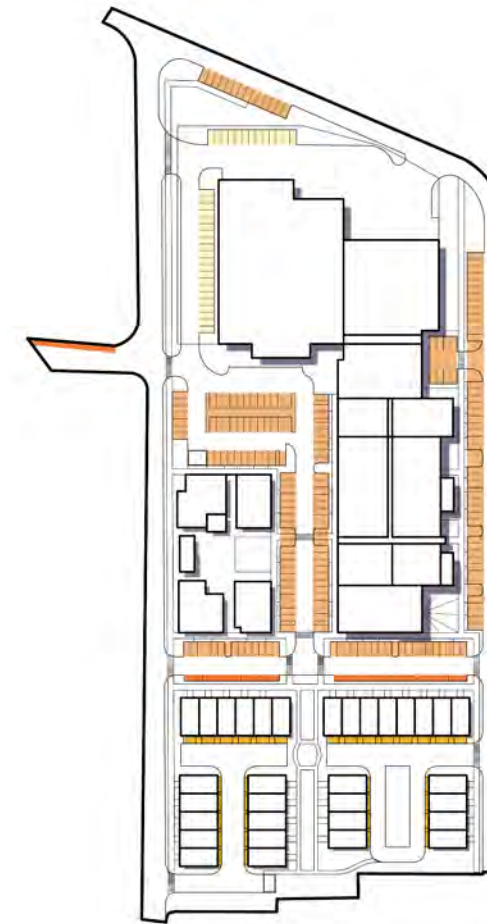
-Primary sidewalks (does not include secondary and residential area sidewalks)

-All primary sidewalks should be a minimum of 8'



## GREENSPACE

-Required public shared open space areas



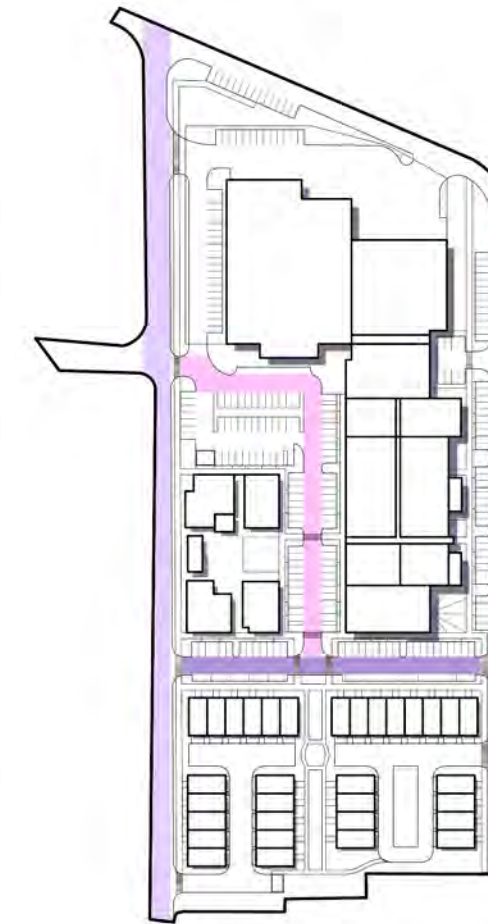
## PARKING

-Parking limited to these areas

- Shared parking is encouraged (see page 8)

- Head-in Parking = 174
- Parallel Parking = 12
- Tuck-under Garage = 32
- Police Dept. Only = 34

\*Edwards St provides 31 additional on-street parallel parking spaces



## STREET TYPES

-See Chapter 4 for street type sections

Internal Streets

- Internal Type A
- Internal Type B
- Blaine
- Hammond



# SUBAREA MAP

- SUB AREA 1:  
Commercial Mixed Use
- SUB AREA 2:  
Residential Mixed Use
- SUB AREA 3:  
Commercial Reuse
- SUB AREA 4:  
Public Services



# SITE PLAN



0 30 60 90 120 150 180 210 240



# DEVELOPMENT CONTROLS



	SUBAREA 1: COMMERCIAL MIXED-USE	SUBAREA 2: RESIDENTIAL MIXED-USE
<b>New Commercial Development (gross area)</b>	12,000 - 24,000 square feet	0 - 12,000 square feet Ground Floor Live-Work Only
<b>New Residential Development</b>	0 to 15 units Upper floors only	28 to 56 units
<b>Building Height</b>	1 to 2 floors Roof top decks allowed	2 to 3 floors Roof top decks allowed
<b>Façade Length</b>	0 to 85 feet	0 to 200 feet
<b>Individual Tenant Size</b>	0 to 10,000 square feet	0 to 600 square feet Ground Floor Live-Work Only
<b>Build-To Zone</b>	0 to 5 feet As measured behind sidewalk	0 to 10 feet As measured behind sidewalk
<b>Shared Open Space</b>	Open Space Zones per Site Plan 4,000 square feet minimum	Open Space Zones per Site Plan 4,000 square feet minimum
<b>Parking</b>	Parking Zones per Site Plan 1.0 - 1.5 spaces per residential unit	Parking Zones per Site Plan 1.0 - 2.0 spaces per residential unit Head-in off Hammond allowed

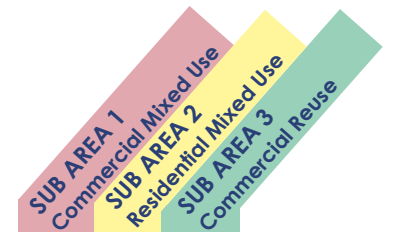
	SUBAREA 3: COMMERCIAL RE-USE	SUBAREA 4: CITY OF MONROE EXISTING
<b>New Commercial Development (gross area)</b>	N/A - rehab of existing	existing only
<b>New Residential Development</b>	N/A - No residential allowed	existing only
<b>Building Height</b>	N/A - rehab of existing	existing only
<b>Façade Length</b>	N/A - rehab of existing	existing only
<b>Individual Tenant Size</b>	0 to 10,000 square ft	existing only
<b>Build-To Zone</b>	N/A - rehab of existing	existing only
<b>Shared Open Space</b>	N/A - rehab of existing	existing only
<b>Parking</b>	Parking Zones per Site Plan Head-in off Hammond allowed	Parking Zones per Site Plan Private Parking for Police / City Services only

**NOTES:**

1. Areas are expressed in overall gross square footages
2. Build-To Zone is as measured behind sidewalks all Primary Sidewalks
3. Shared open space must be contiguous, consolidated and publicly accessible
4. Shared open space area calculation includes only space behind the back of Primary Sidewalks and does not include private dining patios
5. Minimum numbers in ranges represent a threshold requirement

6. No commercial parking is allowed in Subarea 2; Live Work and/or residential guest parking can be accommodated in parallel parking on Internal Type B
7. Live Work is defined as a business contained within a residential units and is owned and operated by the occupant of the same residential unit

# PERMITTED USES BY SUBAREA



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
<b>ACCESSORY BUILDINGS AND USES:</b>				
accessory apartments	X	C	X	
accessory dwelling units	X	C	X	
bed and breakfasts	X	C	C	
fuel dispensary, pump, island, and or canopy	X	X	X	
home occupations	X	P	X	
structures- general	X	C	C	
temporary structures	P	P	P	<i>Regulated under Section 1000.9 of the Zoning Ordinance.</i>
uses-general	X	C	C	
<b>ADMINISTRATIVE AND INFORMATION SERVICE FACILITIES:</b>				
administrative offices/processing center	P	X	P	
cell/telecommunications center	P	X	P	
data processing/ programming facilities	P	X	P	
<b>ALCOHOL AND BEVERAGE STORES:</b>				
beer and wine	P	X	P	
<b>AMUSEMENTS AND ENTERTAINMENT:</b>				
game center	P	P	P	
theaters, outdoor	P	P	X	
<b>ANIMAL FACILITIES AND SERVICES:</b>				
clinics and specialty service	P	P	P	<i>See development controls for tenant size limit</i>
animal/pet supply stores, retail	P	P	P	<i>See development controls for tenant size limit</i>
animal/pet supply stores	P	P	P	<i>See development controls for tenant size limit</i>
<b>ANTIQUA, CURIO, AND COLLECTIBLE SHOPS</b>				
APPAREL STORES, CLOTHING, AND ACCESSORIES				
bridal, vintage, consignment	P	P	P	
new	P	P	P	
secondhand and thrift	P	P	P	
show repair, service	P	P	P	
tailoring and/ or dressmaking service	P	P	P	

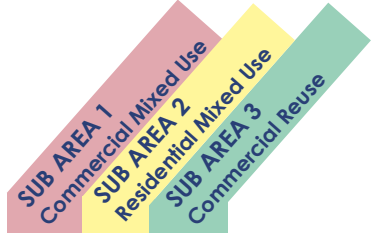
Any uses not specifically listed require a Conditional Use Permit.



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
<b>ARTS, CRAFTS, AND HOBBIES:</b>				
art studio	P	P	P	
craftsman studio	P	P	P	
<b>AUDIO / VIDEO / COMPUTER EQUIPMENT:</b>				
supply stores, rental, and repairs	P	P	P	
supply stores, retail	P	P	P	
<b>BEAUTY SHOP / SERVICES:</b>				
barber, hairdresser, and/or stylist shops	P	P	P	
beauty supply retail	P	P	P	
beauty /health supplies	P	P	P	
manicure establishment	P	P	P	
tanning centers	P	P	P	
<b>BOOK, NEWS, MAGAZINE STORES, RETAIL</b>				
BOOK, NEWS, MAGAZINE STORES, RETAIL	P	P	P	
<b>BUILDING, CONSTRUCTION AND SPECIAL TRADE FACILITIES</b>				
contractor and developer offices	P	P	P	<i>Architecture must be consistent with desired style.</i>
<b>CATERING ESTABLISHMENTS, RETAIL, AND RENTAL</b>				
CATERING ESTABLISHMENTS, RETAIL, AND RENTAL	P	P	P	
<b>CHILDCARE FACILITIES:</b>				
child-care, center	X	X	C	<i>Defined in the Zoning Ordinance as 7 or more children</i>
child-care, home	X	C	X	<i>Defined in the Zoning Ordinance as 6 or less children</i>
<b>CHURCHES:</b>				
community	X	X	X	
megachurch	X	X	X	
neighborhood	P	X	P	
COLLECTION AGENCY	X	X	P	<i>Only permitted on Hammond Drive.</i>
<b>COMMUNITY ASSOCIATIONS/ CLUBS-CIVIC AND PRIVATE</b>				
COMMUNITY ASSOCIATIONS/ CLUBS-CIVIC AND PRIVATE	P	P	P	
<b>CONFECTIONERY AND DESSERT SHOPS, RETAIL</b>				
CONFECTIONERY AND DESSERT SHOPS, RETAIL	P	P	P	
<b>COPY AND BLUEPRINT SHOPS</b>				
COPY AND BLUEPRINT SHOPS	P	P	P	

Any uses not specifically listed require a Conditional Use Permit.

# PERMITTED USES BY SUBAREA



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
DEPARTMENT / DISCOUNT DEPARTMENT STORES, RETAIL	P	P	P	See development controls for size limit.
DETECTIVE AGENCY	P	P	P	
DRUG STORES, RETAIL	P	P	P	
EDUCATIONAL FACILITIES				
schools private, public, parochial	X	C	C	See development controls for size limit.
school programs-day, pre-,post-	P	X	C	See development controls for size limit.
studios for work or teaching or fine arts	P	P	P	See development controls for size limit.
photography, music,drama,dance, martial arts	P	P	P	See development controls for size limit.
FABRIC AND NOTION SHOPS, RETAIL	P	P	P	
FINANCIAL INSTITUTIONS-BANKS, SAVINGS/LOANS				
with/without drive thru window	X	X	X	
automatic teller machine only	C	X	C	Only if integrated, not stand-alone
FLORIST AND PLANT SHOPS, RETAIL	P	P	P	
FUNERAL AND INTERMENT ESTABLISHMENTS				
storage and undertaking, mortuary, and/or funeral home	X	X	X	
GIFT,CARD, AND STATIONARY SHOPS, RETAIL	P	P	P	
GROCERS, RETAIL				
convenience food stores	P	P	P	See development controls for size limit.
delicatessens,bakery, specialty	P	P	P	
grocery markets	P	P	P	See development controls for size limit.
health food	P	P	P	
HEALTHCARE, SERVICE-DENTAL, MEDICAL, ETC.				
clinics (day service only)	X	X	C	
convalescent care, nursing, rest homes	X	X	X	
hospital and laboratories	X	X	X	
person care homes, family	X	C	X	
personal care homes, group	X	X	X	
congregate private offices	X	X	X	

Any uses not specifically listed require a Conditional Use Permit.



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
INTERIOR DESIGN AND DECORATING ESTABLISHMENTS:				
china,clock, frame and/or rug shops	P	P	P	
retail floor covering, retail, and service	P	P	P	
furniture and furnishings stores	P	P	P	
retail hardware and paint stores	P	P	P	
retail kitchen supply stores, retail	P	P	P	
kitchen supply stores, rental	P	P	P	
linen and drapery, retail and service	P	P	P	
wallpaper, retail, and service	P	P	P	
JEWELRY STORES, RETAIL	P	P	P	
LAUNDRY AND/OR DRY CLEANING ESTABLISHMENTS:				
drop and pick up	X	X	X	
stations full-service	X	X	X	
self-service,public	X	X	X	
LAWN AND GARDEN ESTABLISHMENTS:				
supply and equipment, retail and rental	X	X	X	
greenhouse and plant nursery	X	X	X	
LODGING				
bed and breakfast inns	X	C	X	
hotels	X	X	X	
inns	C	C	X	
MERCANTILE AND DRY GOOD STORES, RETAIL	P	P	P	See development controls for size limit.
MEDIA FACILITIES, PRINT, AND ELECTRONIC:				
film and internet production offices	X	P	P	See development controls for size limit.
newspaper offices	X	P	P	See development controls for size limit.
publishing and printing establishments	X	X	X	
MOTOR VEHICLES AND EQUIPMENT:				
car wash, service, or self service	X	X	X	
fuel sales	X	X	X	
general service/ installation of parts/ access	X	X	X	
new or used, sales, and rental	X	X	X	
light duty trailer sales, new-accessory use	X	X	X	
parts/accessories	X	X	X	
sales tires, sales	X	X	X	
MUSICAL INSTRUMENT SHOP, RETAIL	P	P	P	

Any uses not specifically listed require a Conditional Use Permit.

DEVELOPMENT CONTROLS



# PERMITTED USES BY SUBAREA

	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse
<b>OFFICE PARKS:</b>			
medical office parks	X	X	X
professional office parks	X	X	X
<b>OFFICE SUPPLY STORES, RETAIL</b>			
	P	P	P
<b>OPTICAL SUPPLY STORES, RETAIL</b>			
	P	P	P
<b>PARKING, COMMERCIAL-PRIMARY USE:</b>			
garages	X	X	X
lots	X	X	X
<b>PARKS AND RECREATION:</b>			
health/fitness center	P	P	P
gymnasium	X	X	X
neighborhood activity center-accessory use	X	P	P
parks, active	X	X	X
parks, passive	P	P	P
<b>PHOTOGRAPHY:</b>			
supply and processing stores, sales/service	P	P	P
<b>PROFESSIONAL OFFICES</b>			
	P	P	P
<b>PUBLIC BUILDINGS</b>			
government offices, libraries, museums	P	P	P
conventional hall, community center	P	P	P
<b>RECREATIONAL EQUIPMENT STORES, REPAIR AND RENTAL</b>			
	P	P	P
<b>RECREATIONAL EQUIPMENT/SUPPLY STORES, RETAIL</b>			
	P	P	P
<b>RESIDENTIAL:</b>			
accessory apartments	P	P	X
accessory dwellings	X	P	X
apartment buildings	X	P	X
apartment houses	X	P	X
lofts	P	P	X
single-family dwellings	X	X	X
townhomes	X	P	X
<b>RESTAURANT:</b>			
restaurant/café, grill, lunch counter	P	P	P

Any uses not specifically listed require a Conditional Use Permit.

	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse
<b>SALES AND SERVICE FACILITIES:</b>			
appliance stores (small and large), retail, rental, and/or repairs	P	P	P
equipment (small and large), service, and rental	P	P	P
equipment (office), service, and rental	P	P	P
cleaning services janitorial/cleaning supplies	P	P	P
store, wholesale lawn and garden supply	P	P	P
<b>TELECOMMUNICATIONS FACILITIES:</b>			
mobile telephones/ paging, retail, and service	P	P	P
satellite dishes, retail	X	X	X
			Regulated under Section 1000.9 of the Zoning Ordinance.
<b>TEMPORARY BUILDINGS</b>			
	P	P	P
<b>TOY, VARIETY, NOVELTY, AND DIME STORES, RETAIL</b>			
	P	P	P
<b>TRAVEL AGENCIES</b>			
	P	P	P
<b>UTILITY AND AREA SERVICE PROVIDER FACILITIES:</b>			
police, ambulance	X	X	X
television stations	X	X	X
utility transformers, substations, and towers	X	X	X
parking, temporary event	P	P	P

**NOTES:**

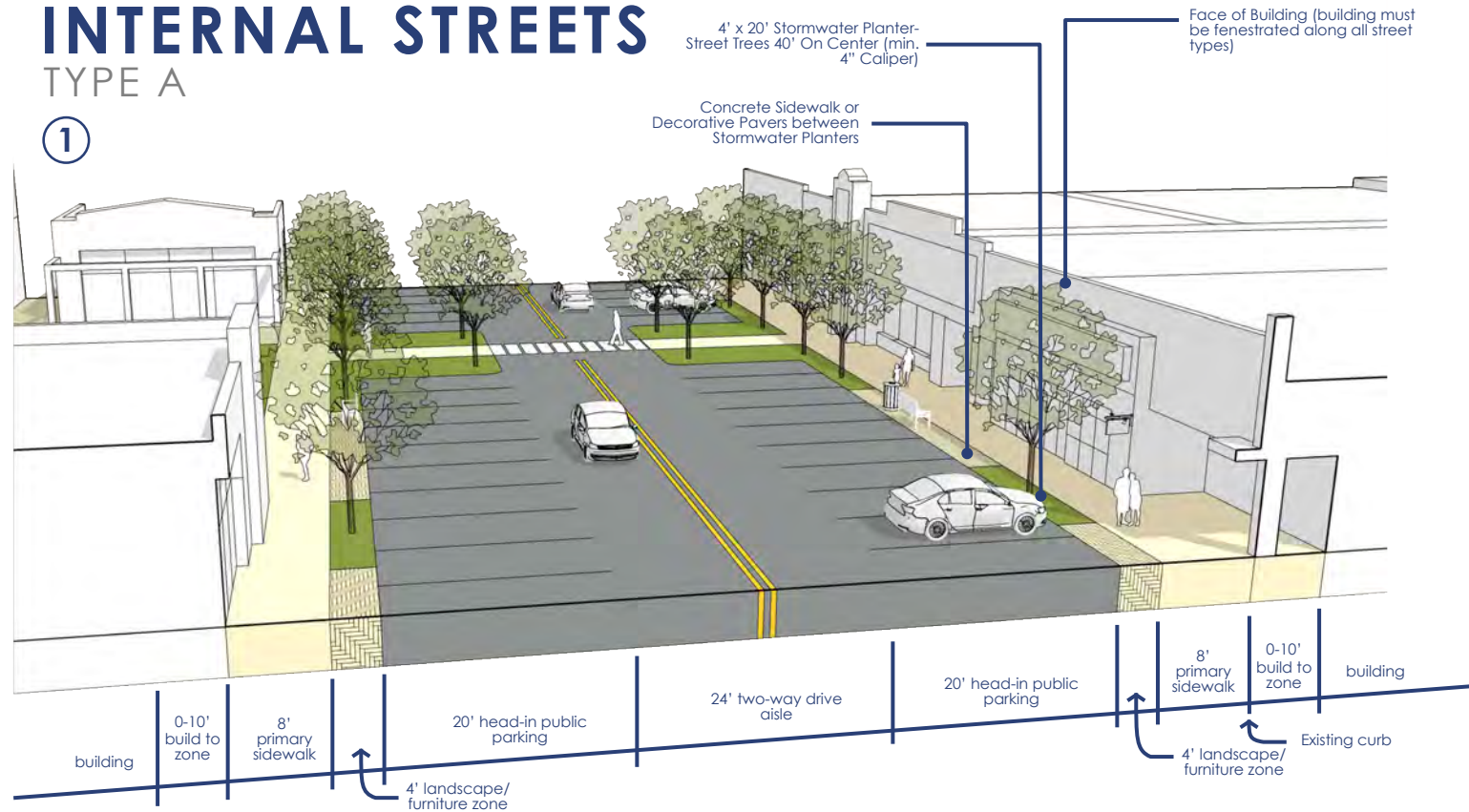
1. Any uses not specifically listed require a Conditional Use Permit
2. See City of Monroe Zoning Ordinance for definitions of individual uses

**4** CHAPTER 4  
STREETSCAPE  
STANDARDS

# INTERNAL STREETS

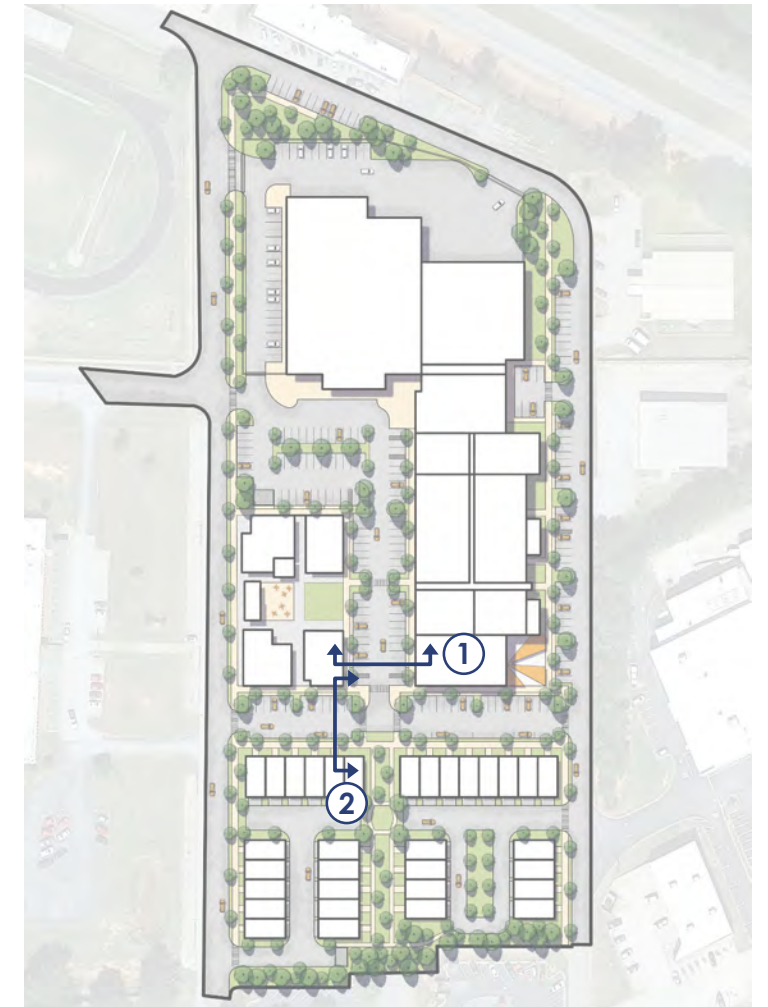
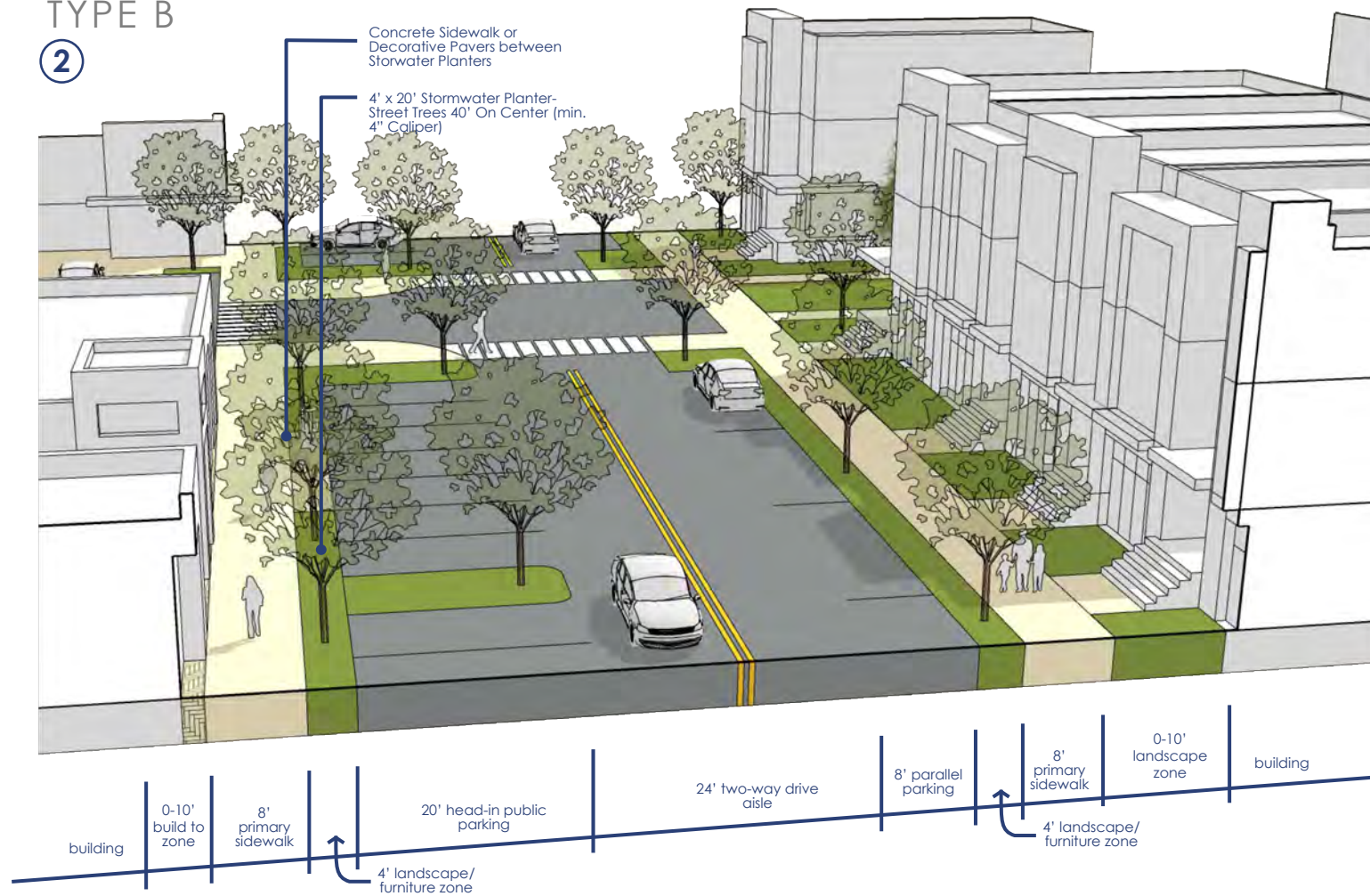
## TYPE A

1



## TYPE B

2





# EXTERNAL STREETS

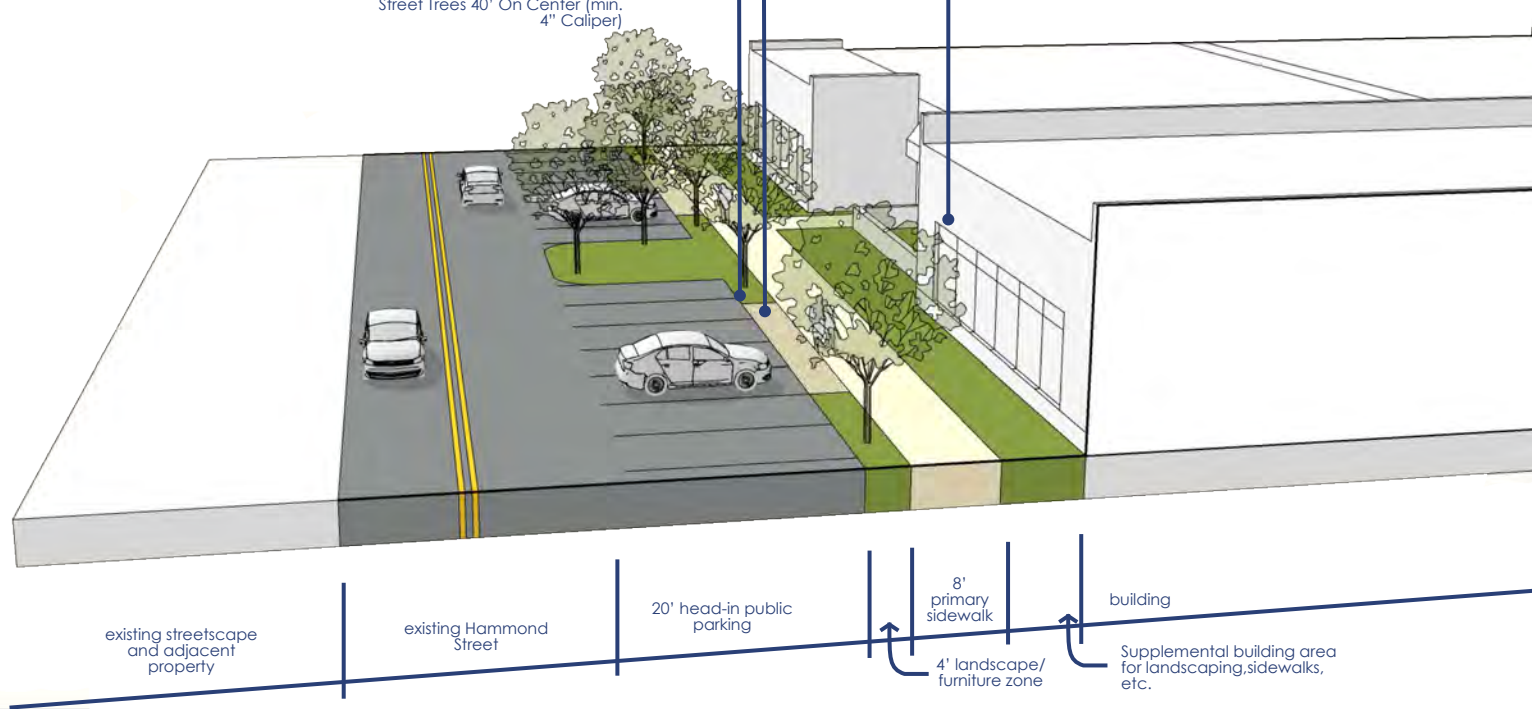
## HAMMOND-SUBAREA 2

3

Concrete Sidewalk or Decorative Pavers between Stormwater Planters

4' x 20' Stormwater Planter- Street Trees 40' On Center (min. 4" Caliper)

New rehabbed building facade to serve as "front doors"



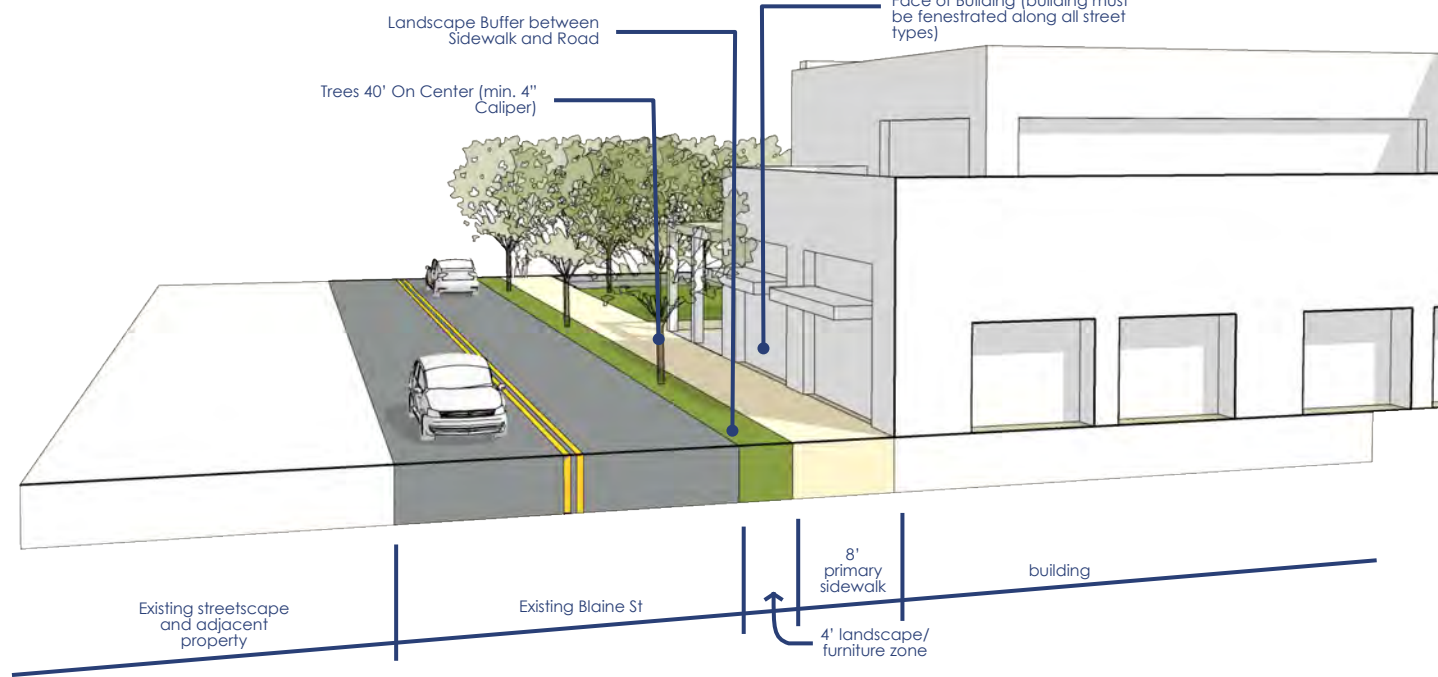
## BLAINE

4

Landscape Buffer between Sidewalk and Road

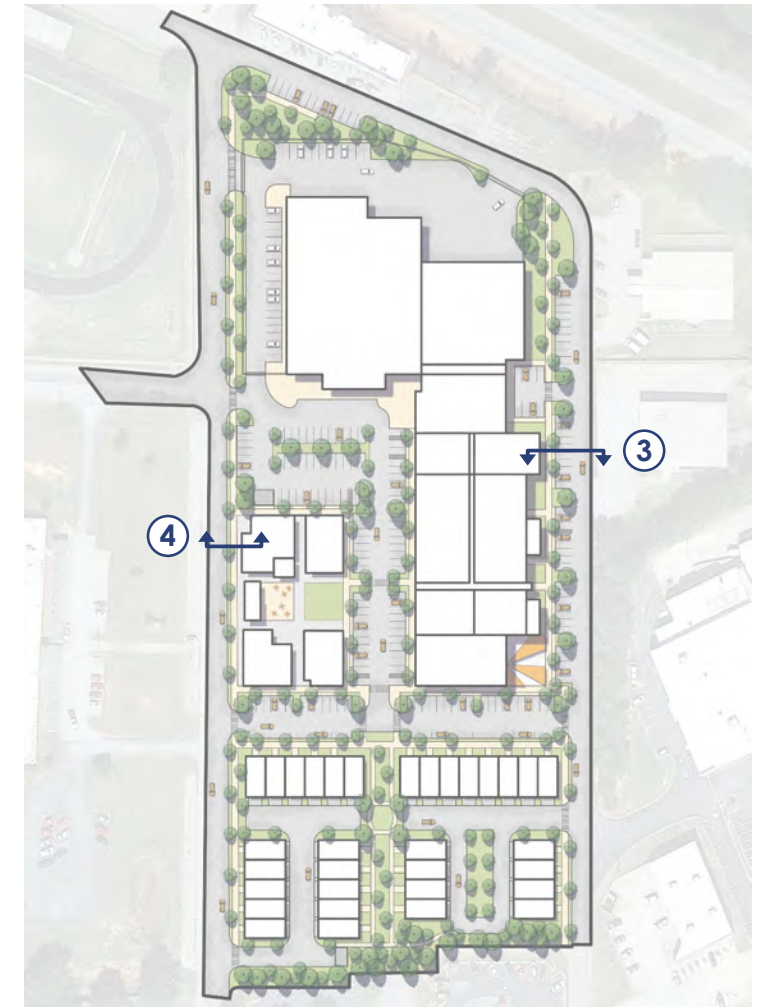
Trees 40' On Center (min. 4" Caliper)

Face of Building (building must be fenestrated along all street types)



KEY PLAN

KEY PLAN



**5** CHAPTER 5  
DESIGN FEATURES



# COMMERCIAL MIXED-USE ARCHITECTURAL STYLE

The desired architectural style is a simplified, contemporary feel with relatively clean lines and a modern aesthetic without being "ultra modern" or overly austere. Traditional and/or ornamental styles that attempt to mimic an historic "main street" aesthetic are discouraged in order to create a district that is differentiated from Downtown Monroe.

## BUILDING MASSING

New commercial/mixed-use buildings should be kept to relatively simple forms, should utilize small footprints and should be designed to emphasize and differentiate individual tenants/vertical bays. Repetitive, continuous facades are discouraged.

## PREFERRED



Example of simple building form with minimal ornamentation



Example of extensive use of building fenestration



Each tenant has a defined storefront breaking up the overall building mass



Clear delineation of individual tenants



Example of simple building form with minimal ornamentation



Example of extensive use of building fenestration

## DISCOURAGED



Avoid the use of traditional detailing such as arch top windows



Avoid historic "main street" feel



Avoid long unbroken cornice lines



Example of a building lacking differentiation from bay to bay



# RESIDENTIAL MIXED-USE

## ARCHITECTURAL STYLE

The desired architectural style is a simplified, contemporary feel with relatively clean lines and a modern aesthetic without being "ultra modern" or overly austere. Traditional and/or ornamental styles that attempt to mimic an historic aesthetic are discouraged in order to create a district that is differentiated from Downtown.

## BUILDING MASSING

New residential/live-work buildings should be kept to relatively simple forms, should be designed to emphasize and differentiate individual units/vertical bays. Repetitive, continuous facades are discouraged.



Example of simple building form with minimal ornamentation



Clean, modern aesthetic and simple lines



Live-work units encouraged



Emphasis on vertical proportions

## PREFERRED



Example of simple building form with minimal ornamentation



## DISCOURAGED



Avoid traditional styling and details



Avoid long unbroken cornice lines that emphasize horizontal proportions



Avoid traditional styling and details



Avoid traditional styling and details



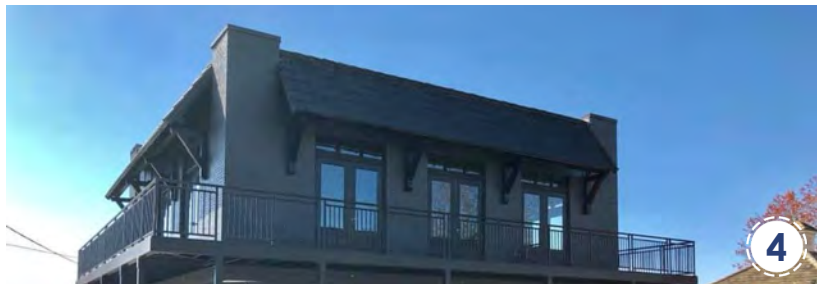
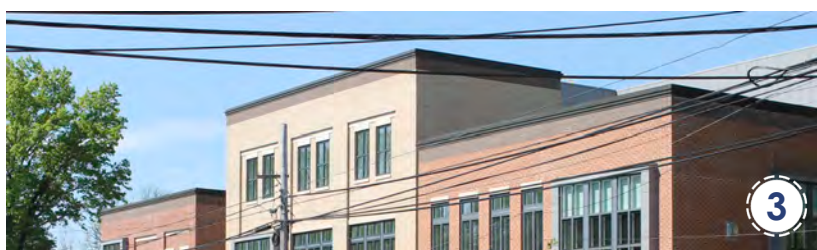
Avoid detached single-family development in favor of higher density options



# ROOF STYLE

For both commercial and residential buildings, parapet/flat/shallow pitch roofs are preferred as a means to de-emphasize the form and mass of the roof as seen from the ground. Heavy use of gables, hips, dormers and overhangs is discouraged.

## PREFERRED



## DISCOURAGED





# MATERIALS + DETAILS

Materials and detailing should be in keeping with a clean, simple contemporary style but should not be "ultra contemporary" or too austere. Painted brick or muted color brick is the preferred dominant material and can be augmented with other secondary materials (other than wood, stone or vinyl). Traditionally styled details and ornamentation such as brackets, distressed or Georgia Red brick, double hung windows, lap siding, molding, etc. are discouraged. Muted color palettes are preferred over bright colors.



4

## PREFERRED



1

Simple detailing and muted color palette



5

Encouraged use of color as an accent element



6

Encouraged window style



2



7



8

Encourage simple and sleek awnings/ overhangs



3



9



10

Encourage simple and sleek awnings/ overhangs



11

Encourage glass storefronts when possible



15

Avoid double hung windows



16

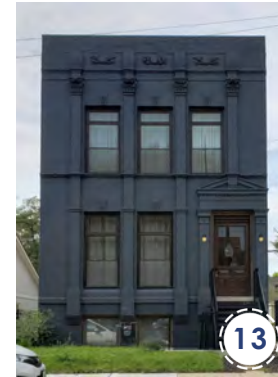
Avoid clad siding

## DISCOURAGED



12

Use of bright colors is discouraged



13

Avoid monolithic color palettes



14

Avoid exposed wood details



17

Avoid rustic stone and wood material combinations



18

Avoid metal siding or buildings



19

Avoid over use of stucco/EIFS or similar



20

Avoid exposed wood details

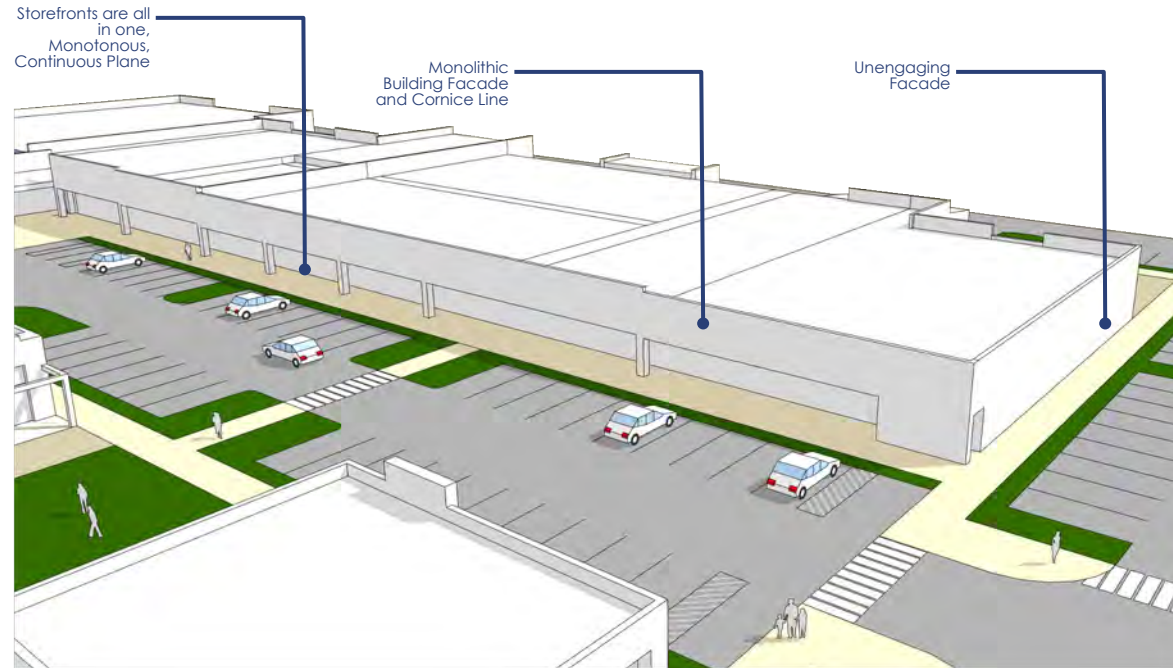


# COMMERCIAL REHAB

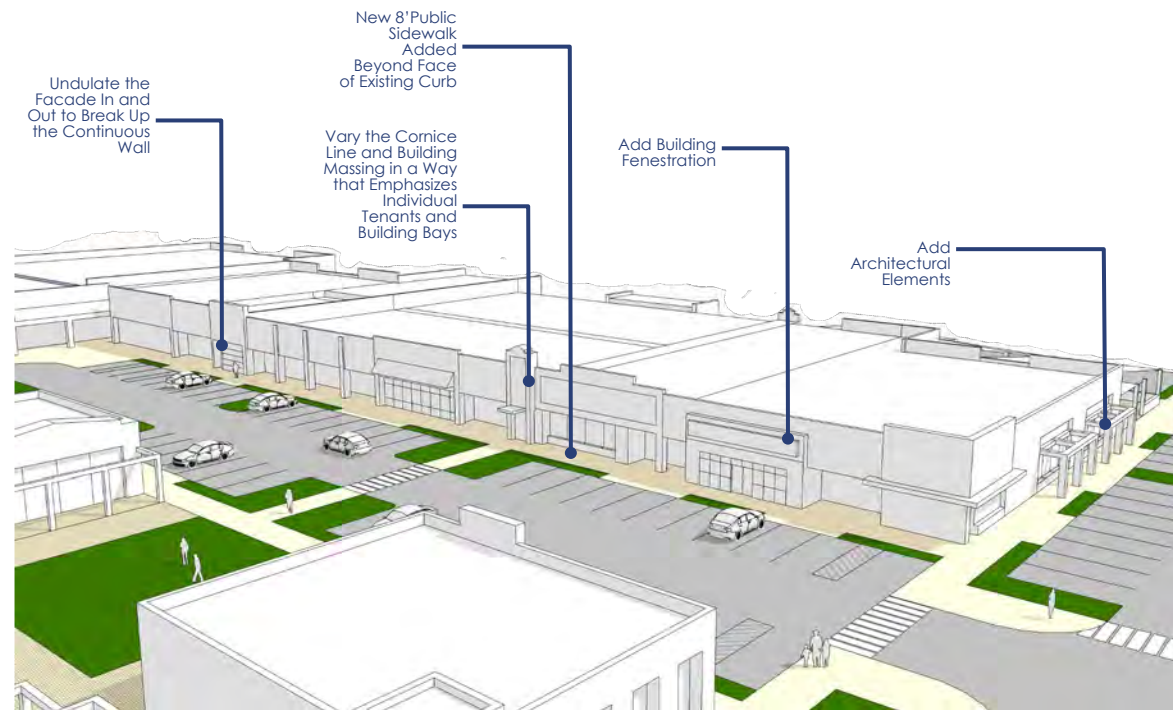
The existing commercial building should be rehabbed in a way that reflects the overall vision and desired attributes for the site. Added architectural elements should be consistent with the overall architectural style and use similar materials.

The key goal for rehabbing the existing building is creating less monolithic, and more differentiated spaces. This goal can be achieved by adding building fenestration, bringing the storefronts out to the pedestrian, adding more engaging outdoor elements, and breaking up the facade both horizontally and vertically.

EXISTING BUILDING FACADE



POTENTIAL BUILDING FACADE



## PREFERRED



Roll up doors can be used to create a connection between indoors and outdoors



Example of opening the building overhang to engage the pedestrian



Add landscape, furniture, and other engaging elements where appropriate



## DISCOURAGED



Avoid traditional/historic aesthetics and styling



Include outdoor dining space where possible and appropriate



Avoid creating a "strip center" feel by avoiding consistent, repetitive bays

DESIGN FEATURES



# SHARED OPEN SPACES

Shared public open spaces (locations and sizes as per the development controls) should be open-air, accessible and open to the public. Spaces should be relatively simple and flexible in design so as to allow a wide variety of programmed and ad-hoc activities. Adjacent buildings should be mindful in how doors, windows and seating areas are located so as to maximize visibility/activity. Landscaping should be used to soften open spaces and make them more attractive. Extensively manicured plantings or over use of landscaping should be avoided in order to mitigate maintenance issues. Materials should durable and permanent. Shared open spaces should not be walled or gated in any way that discourages public use (other than during late evening hours if needed security). In addition to Shared Open Spaces, additional private outdoor dining is also encouraged.

## PREFERRED



4 Encourage small, flexible active recreational uses in open spaces



Encourage engaging storefronts with tables, planters, etc.



Encourage linear open spaces between residential buildings for added greenspace

## DISCOURAGED



Avoid structures and displays that lack a feel of permanence



Avoid open spaces that lack flexibility of use and/or require significant maintenance



Entirely fenced openspaces are not permitted in public spaces



# PLACEMAKING

Placemaking features should be engaging, pedestrian-oriented, and consistent with the vision of the site as a whole. The placement of these features should be primarily in public spaces and used to encourage activity in public areas. Sight lines and view sheds should be considered when determining placement. Features can be static or interactive. Rotating art pieces, temporary exhibits, and community events are appropriate.

Although appropriate placemaking strategies, some features are more consistent with other character areas around Monroe and are discouraged on this site.



Small scale water features are appropriate



Example of appropriate residential only placemaking features including furniture, water features, and small gazebos/shade structures

## PREFERRED



Example of interactive public element



Use lighting to create a sense of place at night



## DISCOURAGED



Structured play equipment is discouraged in public areas



DESIGN FEATURES



# SIGNAGE

## SIGNAGE TYPES

The signage within this development should seek to enhance the identity and pedestrian experience. Signage should generally follow the City of Monroe Zoning Ordinance Article XII- Signs with a few exceptions.

Exceptions:

- 1. In subarea 1, more than one wall sign per a building is suitable for buildings that have frontage on numerous sides. Only one wall sign is allowed per a wall.
- 2. Ground and monument signs for individual buildings are not permitted.
- 3. A wall sign's area shall not be larger than 10% of the frontage wall area of the facade of the story which is occupied by the business or 100 square feet, whichever is less.
- 4. In subarea 4, multiple wall signs shall be allowed with a total sign area not to exceed an aggregate of 240 square feet per wall.

Entry signage, vertical and horizontal blade signs, wall signs on building facade, and standalone way-finding signage are all acceptable sign types. However, vertical and horizontal blade signs are encouraged for individual tenants. Monument signs are only permitted as district-wide branding.

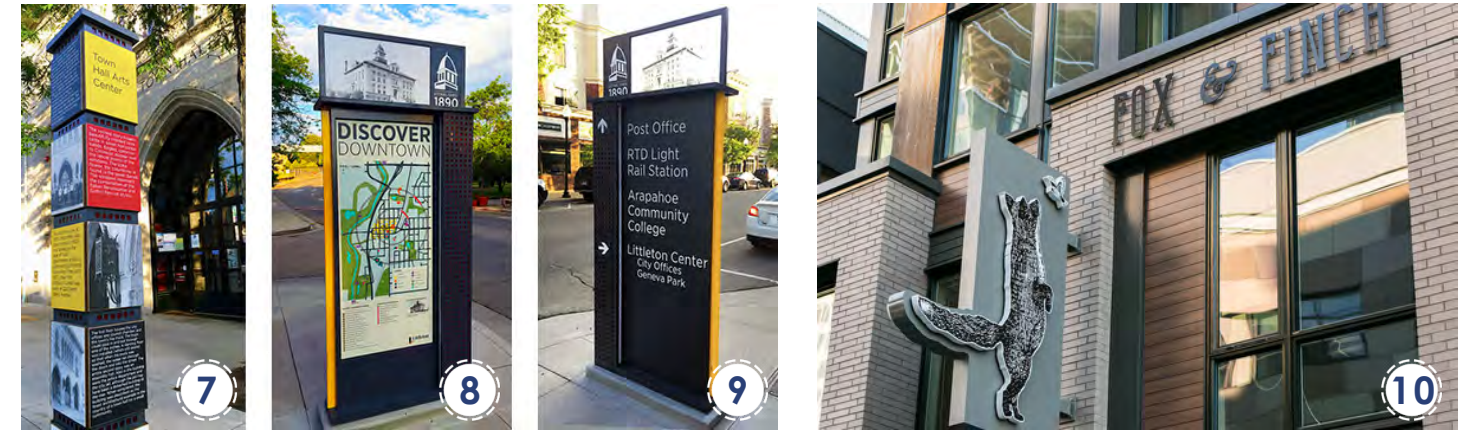
## PREFERRED



## MATERIALS

Signage materials should be consistent and complimentary to the architectural style of the building to which it identifies. All signage should follow the City of Monroe Zoning Ordinances Article XII- Signs regarding materials. All signs shall be clean, simple, and easily legible. Avoid materials such as exposed wood.

Pedestrian scaled wayfinding signs are encouraged and should be consistent in design and color throughout the site so as to read as a collection or set. Signs should be lit via external sources. Signs that are internally illuminated, neon, flashing, or utilized LED strips are discouraged.



Use building elements for illumination as opposed to self-illuminating signs.



Appropriate use of wall sign and blade sign for the same tenant.



## DISCOURAGED



DESIGN FEATURES



# PARKING

Surface parking for commercial uses should be spread throughout the district so as to avoid creating overly large, consolidated paved areas of parking. Parking areas should include the use of street trees in landscaped islands (one tree between every 10 perpendicular parking spaces, min.). Residential parking should be located to the rear of residential buildings, ideally in integrated rear garages accessed via rear alleys. Clearly striped pedestrian cross walks and/or raised speed tables are encouraged.

## PREFERRED



1  
Landscape islands between parking spaces is strongly encouraged



3  
Appropriate example of a stormwater planter with tree (with or without fencing)



2  
Well-marked pedestrian crosswalks are required



4  
Provide landscaping and bulb-outs in parking areas to enhance pedestrian safety and experience



5  
Encourage rear-access garages and alley parking in residential areas



6  
Example of a well-planted larger parking lot

## DISCOURAGED



7  
Parking lots without landscaping are not permitted. Landscape islands are required



8  
Avoid tree wells when possible. Use stormwater planters (4)



9  
In residential areas, avoid forward facing garages and parking



# STORMWATER MANAGEMENT

Responsible and sustainable stormwater management strategies are critical to the success of this development. New development must result in a net decrease in impervious area, reduced runoff and erosion, and improved water quality. A wide variety of Stormwater Best Management Practices (BMPs) are strongly encouraged including (among others): utilizing a whole-site strategy rather than site-by-site approaches, incorporating distributed bioretention areas/rain gardens, downspout disconnects and rainwater harvesting, and pervious pavers/pavement where feasible.



## IMPERVIOUS SURFACE COVERAGE

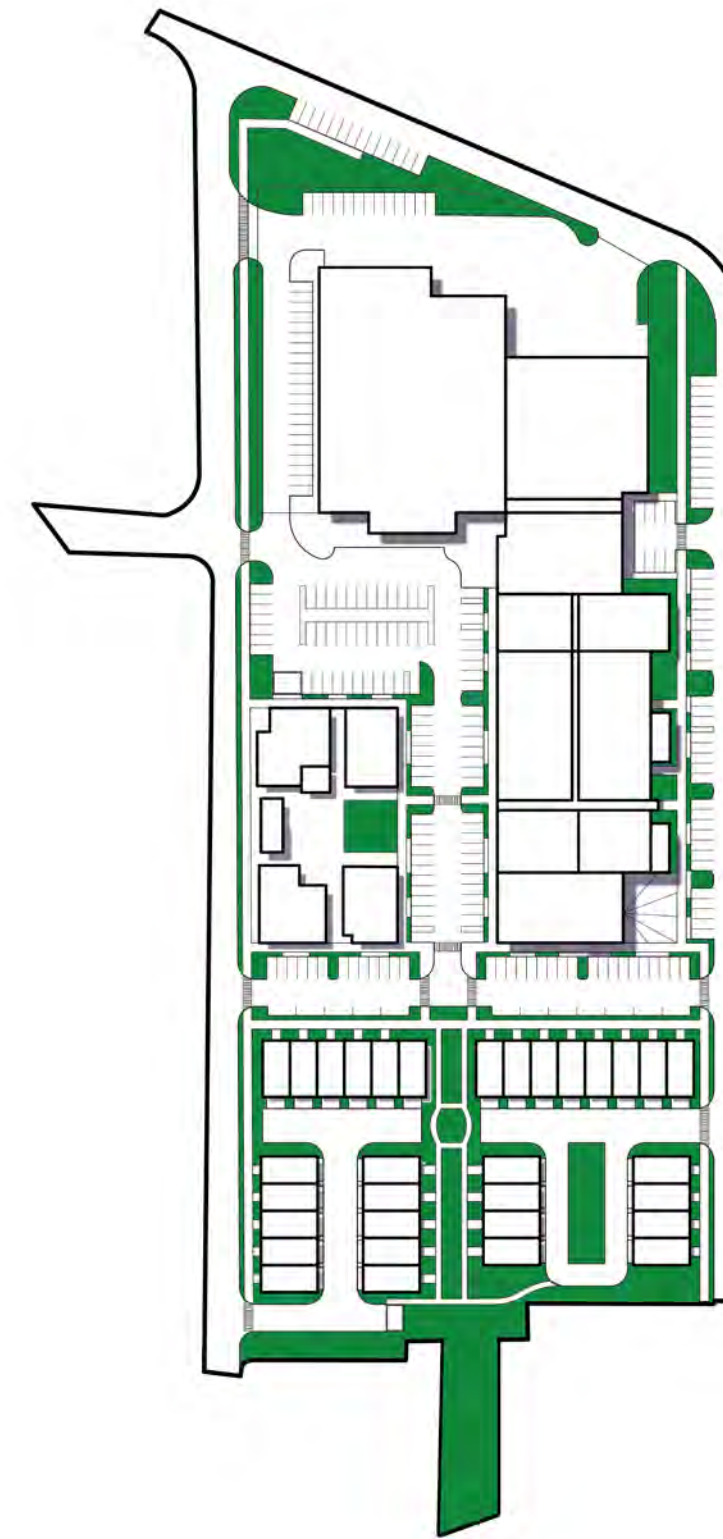
Existing Site Impervious

Surface Area = +/-9.5 ACRES

Proposed Site Impervious

Surface Area = +/-8.7 ACRES

Increase in 0.8 acres of pervious area



Potential Stormwater Management Locations







**To:** City Council  
**From:** Logan Propes  
**Department:** Administration  
**Date:** 11/02/2021  
**Subject:** TEFRA Resolution approving the Valdosta Public Housing Authority vis-a-vis the Monroe Housing Authority to issue revenue bonds for local apartment rehabilitation project.

**Budget Account/Project Name:** N/A

**Funding Sources:** N/A

**Budget Allocation:** N/A

**Budget Available:** N/A

**Requested Expense:** N/A **Company of Purchase:** N/A

**Description:**

Staff recommends that the City Council approve the TEFRA Resolution as presented.

**Background:**

The City was approached by Bond Counsel for the Valdosta Housing authority to authorize a resolution for the Valdosta Housing Authority to exercise its powers within the city limits of Monroe for the purpose of financing a proposed multifamily housing project acquisition and rehabilitation.

The \$11,000,000 in bonds will be used as tax exempt interim financing until the owners convert to permanent financing. The project in Monroe would consist of the rehabilitation of the Country Grove Apartments on Plaza Trace. These apartments will be completely updated inside and out including energy efficient appliances and building materials. According to their counsel, no one will be displaced in the process.

THE BONDS SHALL NOT EVER REPRESENT OR CONSTITUTE A DEBT OR PLEDGE OF THE FAITH AND CREDIT OR THE TAXING POWER OF THE CITY OR ANY OTHER POLITICAL SUBDIVISION AND SHALL SOLELY BE SECURED AND PAYABLE FROM COLLATERAL PROVIDED BY THE BORROWER.

There is no pass-through financing, just authorization of the VHA to create financing project in Monroe.

**Attachment(s):**

- City of Monroe Resolution
- Public Hearing Notice
- Monroe Housing Authority Resolution (no action by City)

**A RESOLUTION OF HOUSING AUTHORITY OF THE CITY OF MONROE  
AUTHORIZING THE VALDOSTA HOUSING AUTHORITY TO ISSUE BONDS TO  
FINANCE THE RENOVATION OF A MULTIFAMILY PROJECT LOCATED IN THE  
CITY OF MONROE, GEORGIA**

WHEREAS, New Country Grove LLC, a Georgia limited liability company (the “Borrower”), and its affiliates, desire to renovate an existing multifamily rental housing facility located at 686 Plaza Trace, Monroe, Georgia 30655, presently known as Country Grove (the “Monroe Project”); and

WHEREAS, based on its overall financing plans, the Borrower and its affiliates desire to have the Valdosta Housing Authority (the “Valdosta Housing Authority”) issue its revenue bonds or other appropriate obligations (the “Bonds”) and to lend the proceeds of the Bonds to the Borrower for the purpose of financing the acquisition, renovation, furnishing and equipping of the proposed Project, in furtherance of the purposes of O.C.G.A. Section 8-3-1, *et seq.*, as amended (the “Housing Authorities Law”), as well as other projects (the “Other Projects”) located in other jurisdictions in the State of Georgia; and

WHEREAS, the Housing Authorities Law, specifically O.C.G.A. Section 8-3-15 provides that a housing authority created for a city may exercise its powers within the territorial limits of another municipality for the purpose of, among other things, financing a project within such municipality, provided that a resolution shall have been adopted by the city in which the authority is to exercise its powers, along with any housing authority which shall have been theretofore established in such city declaring that there is a need for the housing authority to exercise its extraterritorial powers within such city (the “Authority Consent Resolution”); and

WHEREAS, the Borrower has requested that the Housing Authority of the City of Monroe (the “Housing Authority of the City of Monroe”) consider the adoption of an Authority Consent Resolution, providing for the Valdosta Housing Authority to issue bonds, in one or more series, to finance the Monroe Project to be located within the City of Monroe; and

WHEREAS, after review of the nature of the proposed Monroe Project, the Housing Authority of the City of Monroe has determined that due to extenuating circumstances limited to this specific project there is a need to vary from its policy of being the only housing authority to operate in the City of Monroe and allow the Valdosta Housing Authority, on this single occasion, to operate within the area served by the Housing Authority of the City of Monroe solely for the purpose of issuing the Bonds to finance the Monroe Project, together with the Other Projects; and

WHEREAS, in exchange for the Housing Authority of the City of Monroe giving its written consent to allow the Valdosta Housing Authority to issue the Bonds on this one-time basis, at closing, the Borrower shall pay to the Housing Authority of the City of Monroe a fee equal to \$3,750 relating to the principal amount of the Bonds apportioned to the Monroe Project, together with the legal costs of the Housing Authority of the City of Monroe in the amount of \$1,250.

**NOW, THEREFORE, BE IT RESOLVED by the BOARD OF COMMISIONERS OF THE HOUSING AUTHORITY OF THE CITY OF MONROE and it is hereby resolved by authority of the same as follows:**

The Housing Authority of the City of Monroe hereby approves in this single instance the operation of the Valdosta Housing Authority within the City of Monroe for the sole purpose of issuing the Bonds to finance the acquisition, renovation and equipping of the Monroe Project. This approval is given solely for the purpose of compliance with provisions of the Housing Authorities Law and in no event shall this approval constitute any obligation on the part of the Housing Authority of the City of Monroe with respect to the Bonds. The Housing Authority of the City of Monroe shall have no financial obligation or responsibility with respect to the Bonds, the Monroe Project or the Other Projects. Furthermore, it is the policy of the Housing Authority of the City of Monroe consistent with applicable Housing Authority Law that it is the proper housing authority to operate in the City of Monroe and by giving its consent in this single instance the Housing Authority of the City of Monroe in no way waives this policy or consents to any operation in the future of the Valdosta Housing Authority or any other municipal housing authority in the City of Monroe.

[Signature to Follow]



This the \_\_\_\_ day of \_\_\_\_ 2021.

**HOUSING AUTHORITY OF THE CITY OF  
MONROE**

(SEAL)

By: \_\_\_\_\_  
Chairman

ATTEST:

By: \_\_\_\_\_  
Secretary

**RESOLUTION OF THE MAYOR AND CITY COUNCIL OF MONROE, GEORGIA,  
AUTHORIZING THE VALDOSTA HOUSING AUTHORITY TO EXERCISE ITS  
POWERS WITHIN THE CITY OF MONROE FOR THE PURPOSE OF FINANCING A  
PROPOSED MULTIFAMILY HOUSING PROJECT**

**WHEREAS**, the Mayor and Council (“**City Council**”) of the City of Monroe, Georgia (the “**City**”), have been informed by representatives of New Country Grove LLC, a Georgia limited liability company (the “**Borrower**”), that the Borrower and its affiliates, desire to renovate an existing multifamily rental housing facility located at 686 Plaza Trace, Monroe, Georgia 30655 (the “**Project**”), as well as other projects located in other jurisdictions in the State of Georgia; and

**WHEREAS**, the Housing Authorities Law of the State of Georgia (O.C.G.A. Section 8-3-1 et seq.), as amended (the “**Act**”) and specifically O.C.G.A. Section 8-3-15 provides that a housing authority created for a city may exercise its powers within the territorial limits of another municipality for the purpose of, among other things, financing a project within such municipality, provided that a resolution shall have been adopted by the city in which the authority is to exercise its powers, along with any housing authority which shall have been theretofore established in such city declaring that there is a need for the housing authority to exercise its extraterritorial powers within such city (the “**City Resolution**”); and

**WHEREAS**, Valdosta Housing Authority (the “**Valdosta Housing Authority**”) has adopted an inducement resolution under which it agreed in principle to issue its revenue bonds or other appropriate obligations in amount not to exceed \$11,000,000 (the “**Bonds**”) and to lend the proceeds of the Bonds to the Borrower for the purpose of financing in part the acquisition, rehabilitation, construction and development of the Project, in furtherance of the purposes of the Act; and

**WHEREAS**, the Borrower has requested that the City Council of the City adopt this City Resolution declaring the need for the Valdosta Housing Authority to exercise its powers within the jurisdiction of the City for the sole purpose of issuing the Bonds in order to finance the Project; and

**WHEREAS**, another purpose of this City Resolution is to satisfy the public approval requirement of Section 147(f) of the Internal Revenue Code of 1986, as amended (the “**Code**”), in order to qualify the interest on the Bonds for exclusion from the gross income of the owners thereof for federal income tax purposes pursuant to the applicable provisions of the Code; and

**WHEREAS**, after publication of a notice at least 7 days prior to the date of this City Resolution, which notice of the hearing was published in the *Walton Tribune*, a newspaper of general circulation in the City, on this date a public hearing was held regarding the Bonds and the Project being financed in part with the proceeds of the Bonds; and

**WHEREAS**, THE BONDS SHALL NOT EVER REPRESENT OR CONSTITUTE A DEBT OR PLEDGE OF THE FAITH AND CREDIT OR THE TAXING POWER OF THE CITY, WALTON COUNTY, THE STATE OF GEORGIA OR ANY POLITICAL

SUBDIVISION THEREOF AND SHALL SOLELY BE SECURED AND PAYABLE FROM COLLATERAL SPECIFICALLY PLEDGED THEREFOR BY THE BORROWER UNDER THE FINANCING AGREEMENT; and

**WHEREAS**, after careful study and investigation of the nature of the proposed Project and as required by the Act, City Council has determined that it is in the best interest of the inhabitants of the City that the Valdosta Housing Authority issue its revenue bonds in one or more series to finance the Project located within the boundaries of the City.

**NOW, THEREFORE, BE IT RESOLVED** by the MAYOR AND CITY COUNCIL OF THE CITY OF MONROE, GEORGIA and IT IS HEREBY RESOLVED by the City of Monroe, Georgia, as follows:

1. For the sole purpose of complying with the Act, the City finds that the Project will provide safe and sanitary accommodations, that the best means to facilitate the financing for the Project is by the authorizing the Valdosta Housing Authority to exercise its powers within the territorial boundaries of the City for the sole purpose of issuing the Bonds, and that there is hereby declared a need for the Valdosta Housing Authority to exercise such extraterritorial powers.
2. For the sole purpose of qualifying the interest on the Bonds for exclusion from the gross income of the owners thereof for federal income tax purposes pursuant to applicable provisions of the Code, the issuance of the Bonds by Valdosta Housing Authority and the loaning of a portion of the proceeds to the Borrower for the purpose of financing in part the acquisition, rehabilitation, construction and development of the Project is approved.
3. This approval is given solely for the purpose of compliance with provisions of the Act and the Code and in no event shall this approval constitute any obligation on the part of the City with respect to the Bonds. The Bonds issued by the Valdosta Housing Authority shall not constitute a debt of the City within the meaning of any constitutional or statutory provision, and the City shall have no financial obligation or responsibility with respect to the Bonds or the Project.
4. This Resolution shall take effect immediately upon its adoption.

*[Signatures appear on the following page]*



SO RESOLVED AND EFFECTIVE, this 9<sup>th</sup> day of November 2021.

**MAYOR AND COUNCIL OF THE  
CITY OF MONROE, GEORGIA**

(SEAL)

By: \_\_\_\_\_  
Mayor

ATTEST:

By: \_\_\_\_\_  
City Clerk

**NOTICE OF PUBLIC HEARING**

**NOTICE IS HEREBY GIVEN** that on November 9, 2021, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986 will be held by the City of Monroe, Georgia (the “**City**”) with respect to the proposed plan of finance for the issuance by Valdosta Housing Authority of its revenue bonds or other revenue debt obligations in an aggregate principal amount not expected to exceed \$11,000,000 (the “**Bonds**”).

The proceeds of the Bonds will be lent to New Country Grove LLC (the “**Borrower**”) and its affiliates, to be used for the purpose of providing funds to: (i) finance a portion of the costs of the acquisition and renovation of an existing multifamily rental housing facility located at 686 Plaza Trace, Monroe, Georgia 30655 (the “**Monroe Project**”) as well as other projects located in other jurisdictions in the State of Georgia; and (ii) pay all or a portion of the costs of issuance of the Bonds. The Monroe Project will be owned and operated by the Borrower.

**THE BONDS SHALL NOT EVER REPRESENT OR CONSTITUTE A DEBT OR PLEDGE OF THE FAITH AND CREDIT OR THE TAXING POWER OF THE CITY OR ANY OTHER POLITICAL SUBDIVISION AND SHALL SOLELY BE SECURED AND PAYABLE FROM COLLATERAL PROVIDED BY THE BORROWER.**

The hearing will commence at 6:00 p.m. or as soon thereafter as the matter can be heard and will be held in the City Council Chambers, City Hall at 215 N. Broad Street, Monroe, Georgia 30655. Interested persons wishing to express their views on the issuance of the Bonds or on the nature or location of the Monroe Project may attend the public hearing or, prior to the time of the hearing, submit written comments to the City Clerk at 215 N. Broad Street, Monroe, Georgia 30655.

**CITY OF MONROE, GEORGIA**



**To:** Planning and Zoning / City Council  
**From:** Patrick Kelley  
**Department:** Planning, Zoning, Code and Development  
**Date:** 10-11-2021  
**Description:** Zoning ordinance Text amendment #12

**Budget Account/Project Name:** NA

**Funding Source:** 2021 NA

**Budget Allocation:** NA

**Budget Available:** NA

**Requested Expense:** \$NA

**Company of Purchase:** NA

**Recommendation:** Staff recommendation is to approve as submitted

**Background:** This amendment adds the conditional use of Private Sewage Treatment Facilities to section 630.3 Table 6 and also modifies Section 650.4 Special site requirements by removing minimum area requirements for planned districts and reducing street frontage requirements in the LCI district.

**Attachment(s):** Ordinance and exhibit A





# City of Monroe

215 N. Broad Street  
Monroe, GA 30655  
(770) 207-4674

## ZONING TEXT AMENDMENT PERMIT

PERMIT #:	204	DESCRIPTION:	Zoning Text Amendment #12
JOB ADDRESS:	215 N BROAD ST	LOT #:	
PARCEL ID:		BLK #:	
SUBDIVISION:		ZONING:	
ISSUED TO:	CITY OF MONROE	CONTRACTOR:	CITY OF MONROE
ADDRESS:	P.O. BOX 1249	ADDRESS:	P.O. BOX 1249
CITY, STATE ZIP:	MONROE GA 30655	CITY, STATE ZIP:	MONROE GA 30655
PHONE:		PHONE:	
PROP. USE:		DATE ISSUED:	9/08/2021
VALUATION:	\$ 0.00	EXPIRATION:	3/07/2022
SQ FT:	0.00	PERMIT STATUS:	O
OCCP TYPE:		# OF BEDROOMS	
CNST TYPE:		# OF BATHROOMS	
INSPECTION REQUESTS:	770-207-4674 lwilson@monroega.gov	# OF OTHER ROOMS	

FEE CODE	DESCRIPTION	AMOUNT
	FEE TOTAL	
	PAYMENTS	\$ 0.00
	BALANCE	\$ 0.00

**NOTES:**

Section 630.3 Table 6—Industrial Zoning District Land Use Regulations; Modifying Industrial Zoning District Land Use table to add under the principle use of Utility and area service provider facilities—private sewage treatment facilities; this use is to be added as a conditional use.

Section 650.4 Special Site Requirements—Modifying the Special Site Requirements for Planned Development Districts to remove the minimum area requirement for Planned Development Districts throughout the City and inside the Livable Cities Initiative (LCI) District and to reduce the minimum frontage requirement for Planned Development Districts located in the LCI District.

P&Z MTG 10/19/2021 5:30pm—Council MTG 11/9/2021 6:00pm @215 N. Broad St.

**NOTICE**

THIS PERMIT BECOMES NULL AND VOID IF WORK OR CONSTRUCTION AUTHORIZED IS NOT COMMENCED WITHIN 6 MONTHS, OR IF CONSTRUCTION OR WORK IS SUSPENDED OR ABANDONED FOR A PERIOD OF 6 MONTHS AT ANY TIME AFTER WORK IS STARTED.

I HEREBY CERTIFY THAT I HAVE READ AND EXAMINED THIS DOCUMENT AND KNOW THE SAME TO BE TRUE AND CORRECT. ALL PROVISIONS OF LAWS AND ORDINANCES GOVERNING THIS TYPE OF WORK WILL BE COMPLIED WITH WHETHER SPECIFIED HEREIN OR NOT. GRANTING OF A PERMIT DOES NOT PRESUME TO GIVE AUTHORITY TO VIOLATE OR CANCEL THE PROVISION OF ANY OTHER STATE OR LOCAL LAW REGULATING CONSTRUCTION OR THE PERFORMANCE OF CONSTRUCTION.

  
\_\_\_\_\_  
(APPROVED BY)

10/11/2021  
DATE

**AN ORDINANCE TO AMEND THE ZONING  
ORDINANCE OF THE CITY OF MONROE, GEORGIA**

**The Mayor and Council of the city of Monroe, Georgia, hereby ordain as follows:**

**The Zoning Ordinance of the City of Monroe, officially adopted June 10, 2014, and Effective July 1, 2014, as thereafter amended, is hereby amended by implementing text amendments and changes outlined and identified in particular detail on Exhibit A, which such exhibit is incorporated herein by reference.**

All ordinances or parts of ordinances in conflict herewith are hereby repealed.

These text amendments of the City of Monroe Zoning Ordinance shall take effect upon their adoption by the Mayor and Council.

**FIRST READING.** This 9<sup>th</sup>, day of November, 2021.

**SECOND READING AND ADOPTED** on this 14<sup>th</sup> day of December, 2021.

**CITY OF MONROE, GEORGIA**

**By: \_\_\_\_\_ (SEAL)  
John Howard, Mayor**

**Attest: \_\_\_\_\_ (SEAL)  
Debbie Kirk, City Clerk**

EXHIBIT A

City of Monroe Zoning Ordinance Text Amendment

Amendment # 12

1. Section 630.3 Table 6—Industrial Zoning District Land Use Regulations; Modifying Industrial Zoning District Land Use table to add under the principle use of Utility and area service provider facilities—private sewage treatment facilities; this use is to be added as a conditional use.
  
2. Section 650.4 Special Site Requirements—Modifying the Special Site Requirements for Planned Development Districts to remove the minimum area requirement for Planned Development Districts throughout the City and inside the Livable Cities Initiative (LCI) District and to reduce the minimum frontage requirement for Planned Development Districts located in the LCI District. Section 650.4 to be amended as follows:
  - a. 650.4 Special Site Requirements. The site proposed for Planned Development District classification must abut a public street for continuous distance of at least one-hundred (100) feet. The only exception to this frontage requirement shall be in the Livable Cities Initiative District. Because of the special and unique circumstances of both maximum density and unique mixture of land uses within the LCI District, proposals for Planned Development District classification in the LCI District must abut a public street for a distance of at least fifty (50) feet.



# Proposed Amendments to the Zoning Ordinance

October 19 – Planning Commission

November 9 – City Council 1<sup>st</sup> Reading

December 14 – City Council 2<sup>nd</sup> Reading

Amendment Key

**Blue** – Language to be added

**Red** – Language to be removed

**Green** – Amendment description

- **Section 630.3: Modify Industrial Zoning District Land Use Regulation table to add the land use of Private Sewage Treatment Facilities. Added land use will be permitted by Conditional Use Permit in the M-1 zoning district. The land use of Private Sewage Treatment Facilities is based upon NAICS 221320 – Sewage Treatment Facilities.**

## Section 630.3 Industrial Land Use Regulations (M-1):

**Section 630.3 Table 6 - Industrial Zoning District Land Use Regulations**

[P]=permitted; [X]=prohibited; [C]=conditional use permit required

LAND USE CATEGORY	DISTRICT	REFERENCE
<b>Principal Use*(unless noted as an accessory use)</b>	<b>M-1</b>	<b>See Section or Note</b>
<b>Accessory building and uses</b>		
structures-general	P	See §1000.1
temporary buildings	P	See §1000.9
uses-general	P	See §1000.2
<b>Administrative and information service facilities</b>		
administrative offices/processing center	P	
call/telecommunications center	P	
data processing/programming facilities	P	
data processing/programming facilities with product production	P	
<b>AGRICULTURE:</b>		
<b>Greenhouse, nursery, and floriculture production</b>		
indoor food crop production	P	
<b>PROPOSED for 10/12/21 City Council</b>		
<b>Amusements and Entertainment</b>		
adult entertainment establishment	P	Note (5)
archery range or firing range	P	See § 1031
game center	X	
miniature golf, outdoor	X	
play centers, skating rink, bowling alley	P	
theaters	X	
theaters, outdoor	X	
<b>Animal facilities and services</b>		
clinics and specialty services	C	
hospitals, lodging, and shelters	C	
<b>Building, construction and special trade facilities</b>		
contractor and developer offices	P	
contractor/developer offices with facilities	P	
contractor/developer office center	P	
landscape/irrigation service	P	
timber harvesting service	P	
tree surgery service	P	
building supply store, wholesale	P	



<b>RESIDENTIAL</b>	C		
<b>Sales and service facilities</b>			
appliance stores(small and large), retail, rental, and/or repairs	P	Note(4)	
building supply, retail	P		
equipment(small and large), service and rental	P		
equipment(office), service and rental	P		
fuel sales – liquid, wholesale and retail	P		
funeral and interment establishments, wholesale and storage	C		
janitorial cleaning services	P		
janitorial/cleaning supply store, wholesale	P		
laundry and/or dry cleaning establishments, full service	P		
lawn and garden supply, wholesale	P		
locksmith shop, service	P		
manufactured home sale lots	C		
pawn shop and pawnbrokers	P		Code of Ord. Chap 78
pest control services	P		
print and publication shops	P		
scrap hauling service	P		
sewer and septic tank service	C		
vending supply and service	P		
<b>Transportation facilities</b>			
airport	C		
administrative offices/dispatches	C		
commuter lot	C		
stations or terminals	C		
<b>Utility and area service provider facilities</b>			
emergency management services – fire, police, ambulance	P	See Article XI	
garbage and recycling collection services	C		
landfills, incinerators, and dumps	X		
recycling center	C		
<u>private sewage treatment facilities</u>	<u>C</u>		
telecommunications facility, radio and television stations	P		
telecommunications facility towers and antenna	P		
utility administrative office	P		
utility transformers, substations, and towers	P		
<b>Distribution and storage facilities</b>			
warehouse, self-service(mini)	P		
warehouse	P		
distribution warehouse facility	P		
<b>Motor vehicles and equipment</b>			
<b>passenger vehicles and small engine equipment</b>			
body repair and painting	P		
car wash, service or self-service	P		
fuel sales	P		
general service/installation of parts/accessories	P		
new or used, sales and rental	P		
parts/accessories, sales	P		
tires, sales	P		
vehicle storage yard	P		
welding and fabrication	P		
wrecker and/or towing, service	P		



<b>heavy trucks, RVs and other heavy equipment</b>		
body repair and painting	P	
fueling station	P	
general service/installation of parts and accessories	P	
new or used, sales and rental	P	
parts/accessories/tires, sales	P	
truck wash, service or self-service	P	
terminal, motor freight	P	
truck stop/travel plaza	P	

➤ ***Section 650.4: Amend language in the special site requirements for Planned Development Districts. Remove the minimum area requirement for Planned Development Districts located throughout the City and inside the Livable Cities Initiative District (LCI) in order to enable more Planned Districts within the City. Reduce the minimum frontage requirement for Planned Development Districts located in the LCI District.***

650.4 Special Site Requirements. The site proposed for Planned Development District classification must ~~contain a minimum area: 1) PRD between twelve (12) and forty eight (48) acres, 2) PCD/PPD: between twenty four (24) and sixty (60) acres, and 3) PID: at least twenty four (24) acres, unless a smaller are is specifically approved by the Planning Commission and Council due to special and unusual circumstances related to the topography of the site. In no case shall any planned unit development be less than ten (10) acres. The site must~~ but a public street for continuous distance of at least one-hundred (100) feet.

The only exception to ~~these size this frontage~~ requirements shall be in the Livable Cities Initiative District. Because of the special and unique circumstances of both maximum density and unique mixture of land uses within the LCI District, proposals for Planned Development District classification in the LCI District must ~~contain a minimum of two (2) acres. The site must~~ but a public street for a distance of at least ~~seventy five (75)~~ **fifty (50)** feet.

**NOTICE TO THE PUBLIC  
CITY OF MONROE**

**The City of Monroe Planning Commission will be holding a hearing for a zoning action/zoning code text amendment of Article VI, Section 630.3, Table 6 and Section 650.4. A public hearing will be held on October 19, 2021 at 5:30 P. M. in the City Hall Building at 215 N. Broad Street.**

**The City of Monroe Council will be holding a hearing for a zoning action/zoning code text amendment of Article VI, Section 630.3, Table 6 and Section 650.4. A public hearing will be held on November 9, 2021 at 6:00 P.M. in the City Hall Building at 215 N Broad Street.**

**All those having an interest should be present.**

**Please run on the  
following date:**

**October 3, 2021**



October 8, 2021

**VIA EMAIL/REGULAR MAIL  
AND HAND DELIVERY**

Mayor John Howard  
and City Council  
215 N. Broad St.  
Monroe, GA 30655

**Re: Appeal of Denial of Certificate of Appropriateness Demolition Request for 1238 S. Madison Ave.**

Dear Mayor Howard and City Council Members:

Please accept this as my formal request to appeal the October 7, 2021, denial pertaining to the above-referenced matter. Therefore, please place this matter on your next available hearing calendar so that I may present my appeal at that time.

If you have any questions or concerns, or if you need additional information, please do not hesitate to contact me at (678) 334-0207 or (678) 934-3041.

Thank you for your assistance.

Sincerely,

Lawrence E. Parker





**To:** Planning and Zoning / City Council  
**From:** Patrick Kelley  
**Department:** Planning, Zoning, Code and Development  
**Date:** 10-08-2021  
**Description:** Rezone B-3 to PCD (Planned Commercial District) at 140 Blaine Street, City of Monroe Redevelopment project.

**Budget Account/Project Name:** NA

**Funding Source:** 2021 NA

**Budget Allocation:** NA

**Budget Available:** NA

**Requested Expense:** \$NA **Company of Purchase:** NA

**Recommendation:** Staff recommends approval of this rezone request.

**Background:** This is a redevelopment project of a defunct shopping plaza by the City of Monroe to be executed per the Blain Street Master Plan. It currently houses the recently renovated Municipal Court and the Police Department.

**Attachment(s):** Staff Report, Application, zoning notification letter, Master Plan draft



**Planning  
City of Monroe, Georgia  
REZONE STAFF REPORT**

---

**APPLICATION SUMMARY**

**REZONE CASE #:** 188

**DATE:** October 8, 2021

**STAFF REPORT BY:** Brad Callender, City Planner

**APPLICANT NAME:** City of Monroe

**PROPERTY OWNER:** City of Monroe

**LOCATION:** North side of E Spring Street, east side of Blaine Street, south and west sides of Hammond Drive – 140 Blaine Street

**ACREAGE:** ±8.84

**EXISTING ZONING:** B-3 (Highway Commercial District)

**EXISTING LAND USE:** City of Monroe Police Station, shopping center and associated parking

**ACTION REQUESTED:** Rezone B-3 to PCD (Planned Commercial District)

**REQUEST SUMMARY:** The City of Monroe is rezoning property as part of the redevelopment of the old Walton Plaza shopping center.

**STAFF RECOMMENDATION:** Staff recommends approval of this rezone request.

**DATES OF SCHEDULED PUBLIC HEARINGS**

**PLANNING COMMISSION:** October 19, 2021

**CITY COUNCIL:** November 9, 2021

---

**STAFF RECOMMENDATION**

Based upon the City Council’s policies, decision making criteria and standards outlined in the Zoning Ordinance of the City of Monroe, staff fully supports the rezoning and redevelopment of the subject property as a Planned Commercial District and recommends the rezoning be approved as presented in the Blaine Street Master Plan.



# City of Monroe

215 N. Broad Street  
Monroe, GA 30655  
(770) 207-4674

## REZONE PERMIT

PERMIT #:	188	DESCRIPTION:	REZONING 8.84 acres B-3 to PCD
JOB ADDRESS:	140 BLAINE ST	LOT #:	
PARCEL ID:		BLK #:	
SUBDIVISION:		ZONING:	
ISSUED TO:	CITY OF MONROE	CONTRACTOR:	CITY OF MONROE
ADDRESS:	P.O. BOX 1249	ADDRESS:	P.O. BOX 1249
CITY, STATE ZIP:	MONROE GA 30655	CITY, STATE ZIP:	MONROE GA 30655
PHONE:		PHONE:	
PROP. USE VALUATION:	\$ 1.00	DATE ISSUED:	8/31/2021
SQ FT	0.00	EXPIRATION:	2/27/2022
OCCP TYPE:		PERMIT STATUS:	O
CNST TYPE:		# OF BEDROOMS	
INSPECTION REQUESTS:	770-207-4674 dadkinson@monroega.gov	# OF BATHROOMS	
		# OF OTHER ROOMS	

FEE CODE	DESCRIPTION	AMOUNT
PZ-02	COMM-OTHER REZONE/VARIANCE	\$ 0.00
<b>FEE TOTAL</b>		\$ 0.00
<b>PAYMENTS</b>		\$ 0.00
<b>BALANCE</b>		\$ 0.00


**NOTES:**

This application will be heard by the Planning Commission on 10/19/2021 at 5:30pm and by City Council on 10/12/2021 at 6:00pm. Both meetings will be held at City Hall located at 215 N. Broad St. Monroe, GA 30655

**NOTICE**

THIS PERMIT BECOMES NULL AND VOID IF WORK OR CONSTRUCTION AUTHORIZED IS NOT COMMENCED WITHIN 6 MONTHS, OR IF CONSTRUCTION OR WORK IS SUSPENDED OR ABANDONED FOR A PERIOD OF 6 MONTHS AT ANY TIME AFTER WORK IS STARTED.

I HEREBY CERTIFY THAT I HAVE READ AND EXAMINED THIS DOCUMENT AND KNOW THE SAME TO BE TRUE AND CORRECT. ALL PROVISIONS OF LAWS AND ORDINANCES GOVERNING THIS TYPE OF WORK WILL BE COMPLIED WITH WHETHER SPECIFIED HEREIN OR NOT. GRANTING OF A PERMIT DOES NOT PRESUME TO GIVE AUTHORITY TO VIOLATE OR CANCEL THE PROVISION OF ANY OTHER STATE OR LOCAL LAW REGULATING CONSTRUCTION OR THE PERFORMANCE OF CONSTRUCTION.

  
\_\_\_\_\_  
(APPROVED BY)

10/11/2021  
\_\_\_\_\_  
DATE





CODE DEPARTMENT

October 4, 2021

To Whom It May Concern:

Be advised that a public hearing before the Planning and Commission is scheduled for October 19, 2021 to consider an application for rezoning 8.84 acres located at 140 Blaine St Monroe, GA 30655. The property is currently zoned B-3 with a request to change the zoning classification to Planned Commercial District (PCD). As an adjacent property owner, you are officially being notified of this request. Further notice of this request will appear in the Walton Tribune on October 3, 2021.

All public hearings will be held in the Council Chambers located at City Hall—215 N. Broad St Monroe, GA 30655. Public hearings regarding the rezone request for 140 Blaine St will be as follows:

- Planning Commission—October 19, 2021 at 5:30pm
- City Council—November 16, 2021 at 6:00pm

You are welcome to speak for or against this application during the public hearings; however, your attendance is not required. One week prior to the Planning Commission meeting, copies of the application submittal will be available for viewing online at [www.monroega.com](http://www.monroega.com) by selecting calendar and the date of the meeting you plan to attend for this application.

If you have any questions regarding this letter, please call the City of Monroe Code Department at 770-207-4674.

Sincerely,

Laura Wilson  
Code Department Assistant

**NOTICE TO THE PUBLIC  
CITY OF MONROE**

**A petition has been filed with the  
City of Monroe requesting the  
property at 140 Blaine St to  
be rezoned from B3 to PCD.**

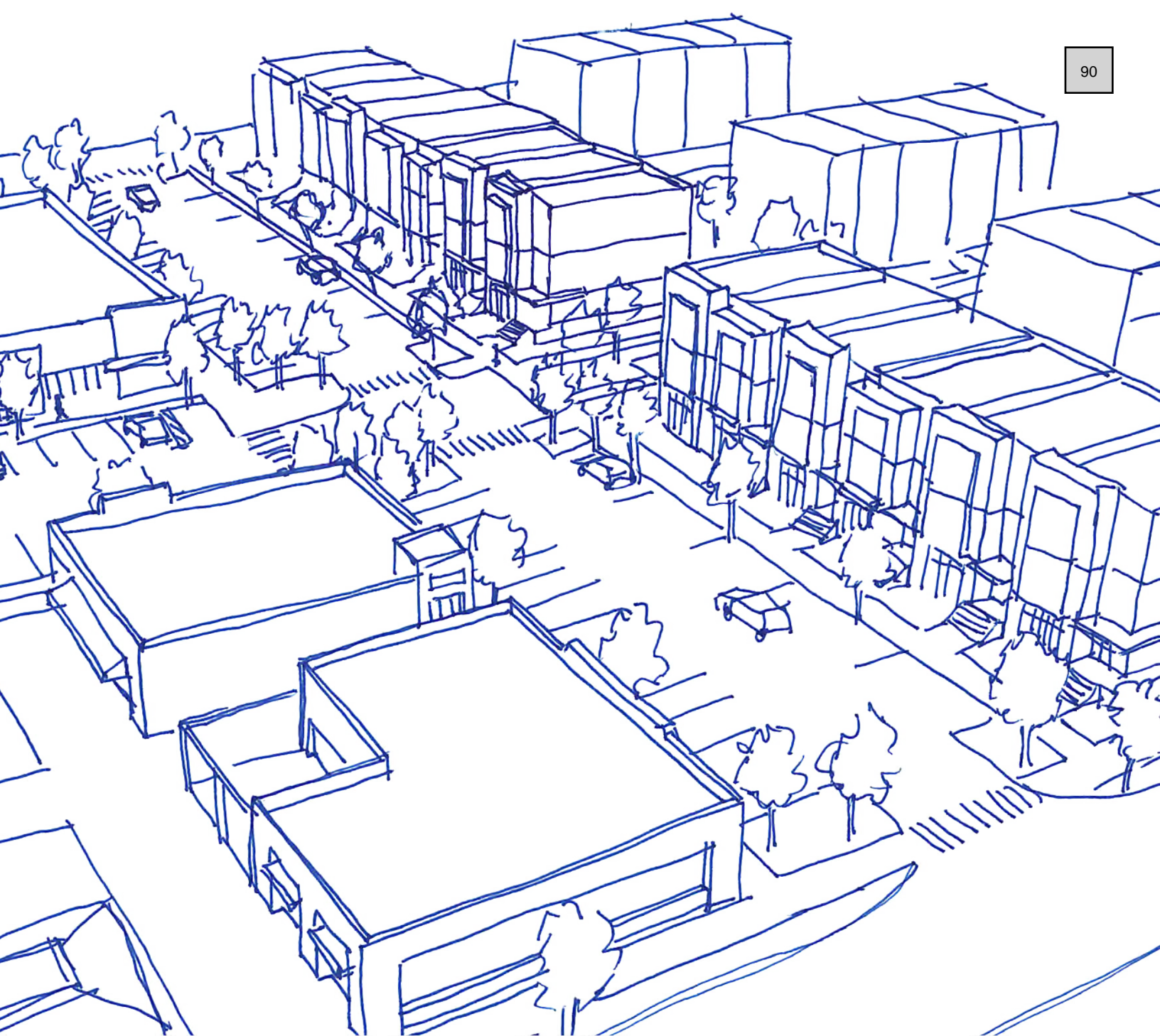
**A public hearing will be held before  
the Monroe Planning Commission at  
City Hall Auditorium at  
215 N. Broad Street on October 19, 2021  
at 5:30 P.M. All those having an  
interest should be present to voice  
their interest.**

**A petition has been filed with the  
City of Monroe requesting the  
property at 140 Blaine St to  
be rezoned from B3 to PCD.**

**A public hearing will be held before  
The Mayor and City Council  
at the City Hall Auditorium at  
215 N. Broad Street on November 9, 2021  
at 6:00 P.M. All those having an  
interest should be present to voice  
their interest.**

**PLEASE RUN ON THE  
FOLLOWING DATE:**

**October 3, 2021**



BLAINE

# STATION

MASTER PLAN

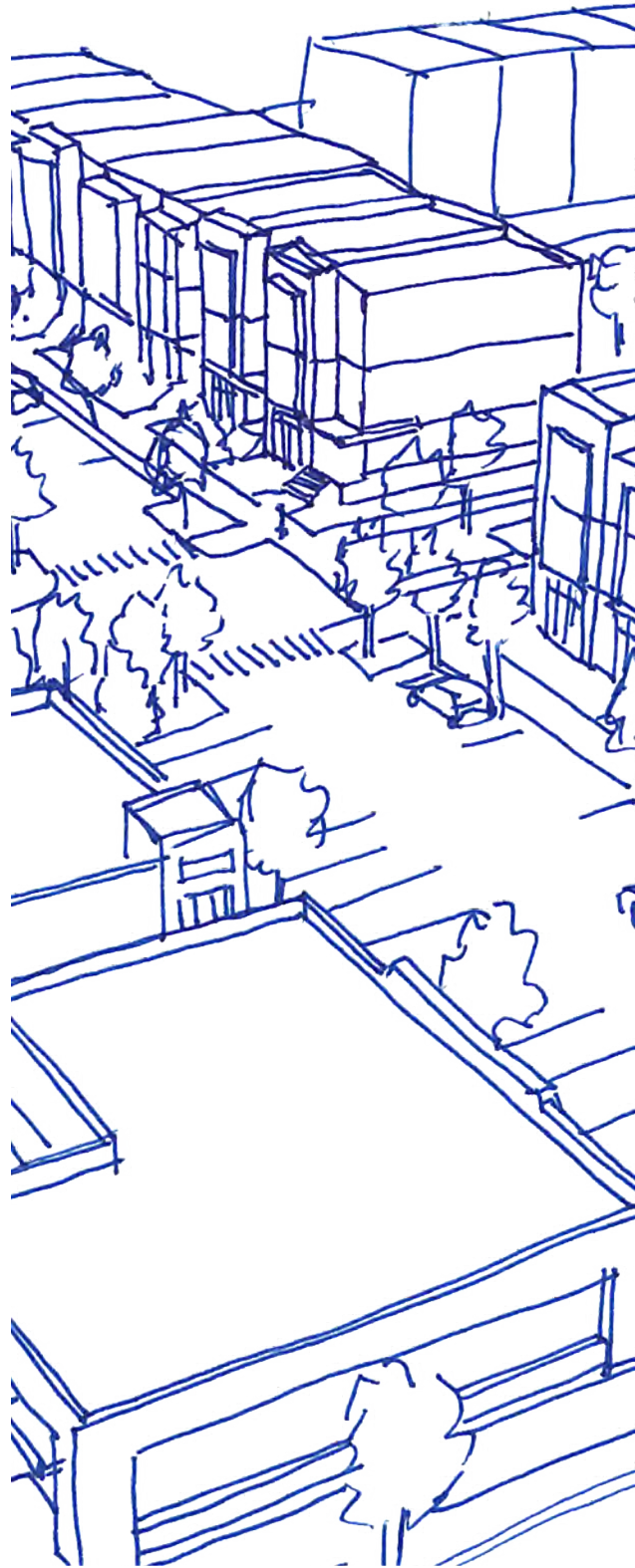
OCTOBER X, 2021

**DRAFT FOR REVIEW ONLY**



LORD  
AECK  
SARGENT





## City of Monroe Project Team

Logan Propes, City Administrator

Chris Bailey, Assistant City Administrator

Sadie Krawczyk, Economic Development Director

Brad Callender, AICP CNU-A, City Planner

## Lord Aeck Sargent

Robert Begle, Principal Urban Designer

Travis Ridenbaugh, Mixed-use architect

Julia Doolittle, Urban Designer and Landscape Designer

- 1** CHAPTER 1: Context + Overview
- 2** CHAPTER 2: Development Concept
- 3** CHAPTER 3: Development Controls
- 4** CHAPTER 4: Streetscape Standards
- 5** CHAPTER 5: Design Features

## PROJECT OVERVIEW

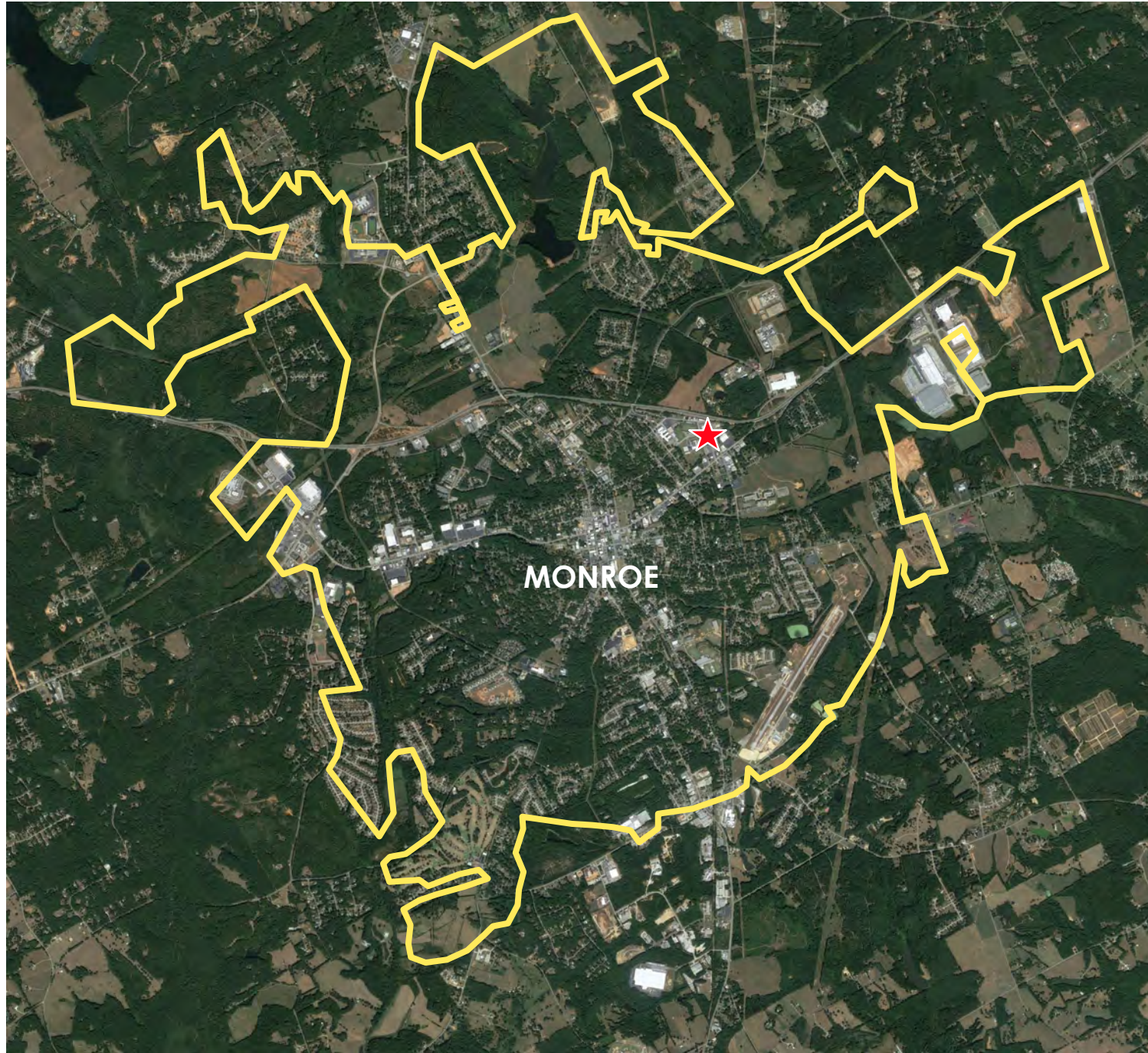
This Blaine Station Master Plan is a development study of 140 Blaine Street, located on the east side of Monroe, Ga. As a city-owned property, the future development of this site can be proactively dictated in a manner that sets a tone for new compatible development on the east side and throughout the City as a whole. This study is intended to convey a vision of a walkable, mixed-use district that serves as a destination. The vision includes stand-alone retail, restaurants and other commercial in small format settings. Commercial uses are supplemented with small public shared open space and adjacent residential development. The open spaces are intended to be flexible in layout and design so as to accommodate a wide variety of programmed and ad-hoc events on a daily, weekly and/or yearly basis.

This report is divided into several sections including: Context, Development Concept, Development Controls, Streetscape Standards and Design Features. The Development Controls section is intended to be formally regulated through the use of site-specific Planned Unit Development zoning. The Design Features are intended to provide a guide for the desired character of the district but are not regulatory.

**1** CHAPTER 1  
CONTEXT + OVERVIEW



# CONTEXT

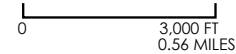


## KEY

- ★ Site- 140 Blaine St
- City of Monroe

## SITE DISTANCE TO:

- Bethlehem 9.9 miles
- Walnut Grove 10.6 miles
- Social Circle 11.1 miles
- Loganville 12.6 miles
- Winder 14.5 miles
- Snellville 20.5 miles
- Covington 20.8 miles
- Athens 25.7 miles



# EAST MONROE



## KEY PLAN

- Site- 140 Blaine St
- ★ Points of Interest

## SITE DISTANCE TO:

- Downtown Monroe 1.0 mile





# EXISTING SITE



The current site is underutilized consisting of mainly vacant building space and surface parking. The north portion of the existing building has recently been renovated and will house the City of Monroe police department, municipal court, and utility/infrastructure. The remainder of the existing building is vacant and in need of repairs and renovations.

In the effort to limit the amount of parking developed on-site and to avoid creating large surface parking lots, individual agreements could be negotiated with adjacent property owners to provide off-peak shared parking, particularly during Court hours/days and evenings/weekends where parking will be in high demand.



View of Existing Building Looking North



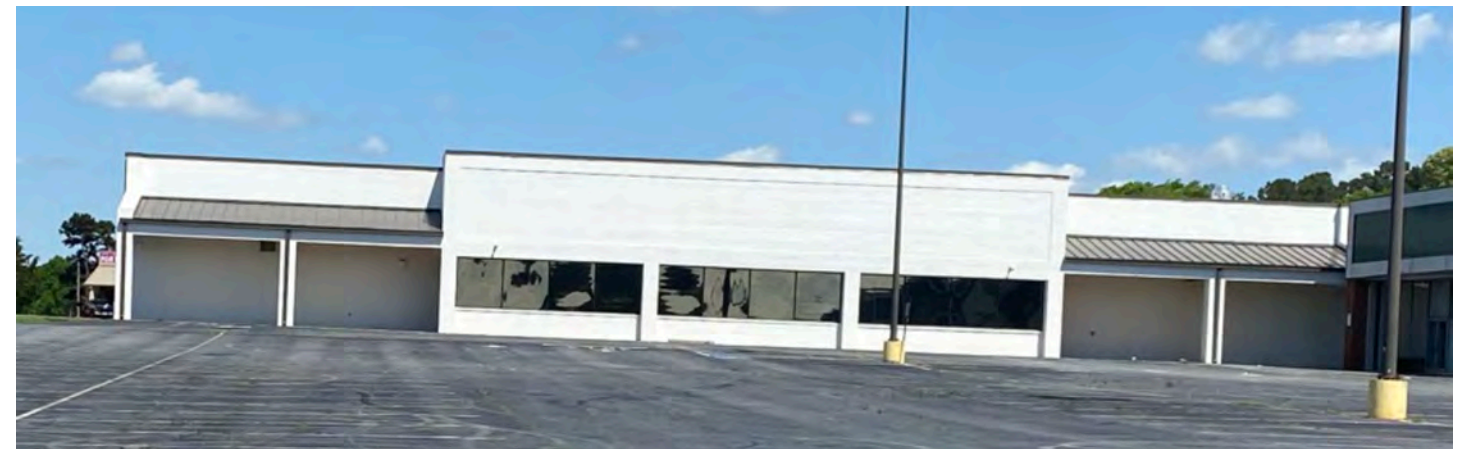
View of Existing Surface Parking Lot Looking South



View of Rear Side of Existing Building



View of Neighboring Development Behind the North End of the Existing Building



View of Renovated City of Monroe Building



**2** CHAPTER 2  
DEVELOPMENT  
CONCEPT

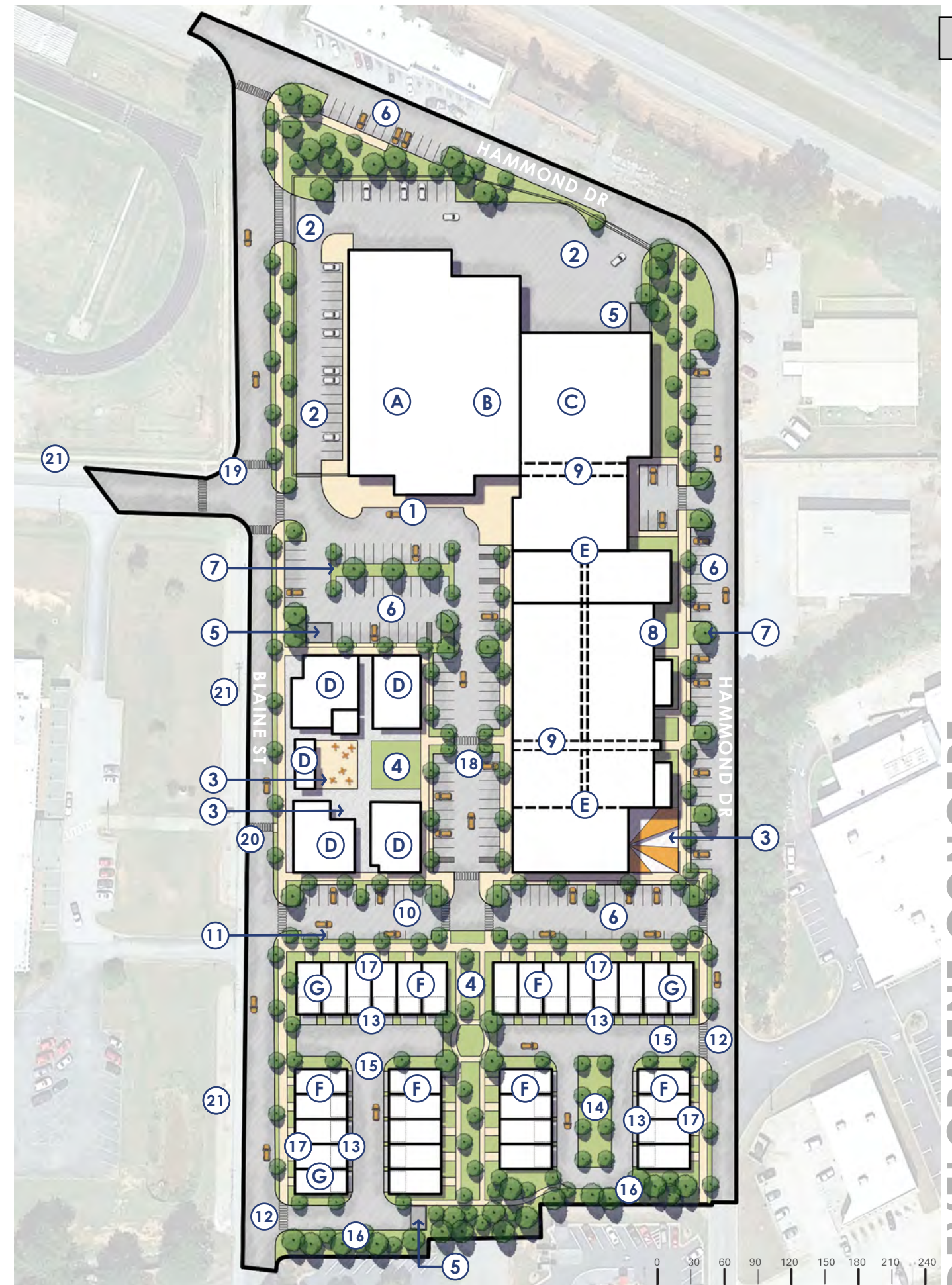
# DEVELOPMENT CONCEPT PLAN

## BUILDING USES

- (A) Existing City of Monroe Police
- (B) Existing City of Monroe Municipal Court
- (C) Existing City of Monroe Utility/ Infrastructure
- (D) New Commercial/Retail/ Mixed-Use
- (E) Commercial Rehab of Existing Building
- (F) Residential (Rear-Loaded Parking Underneath)
- (G) Potential Live-Work Units

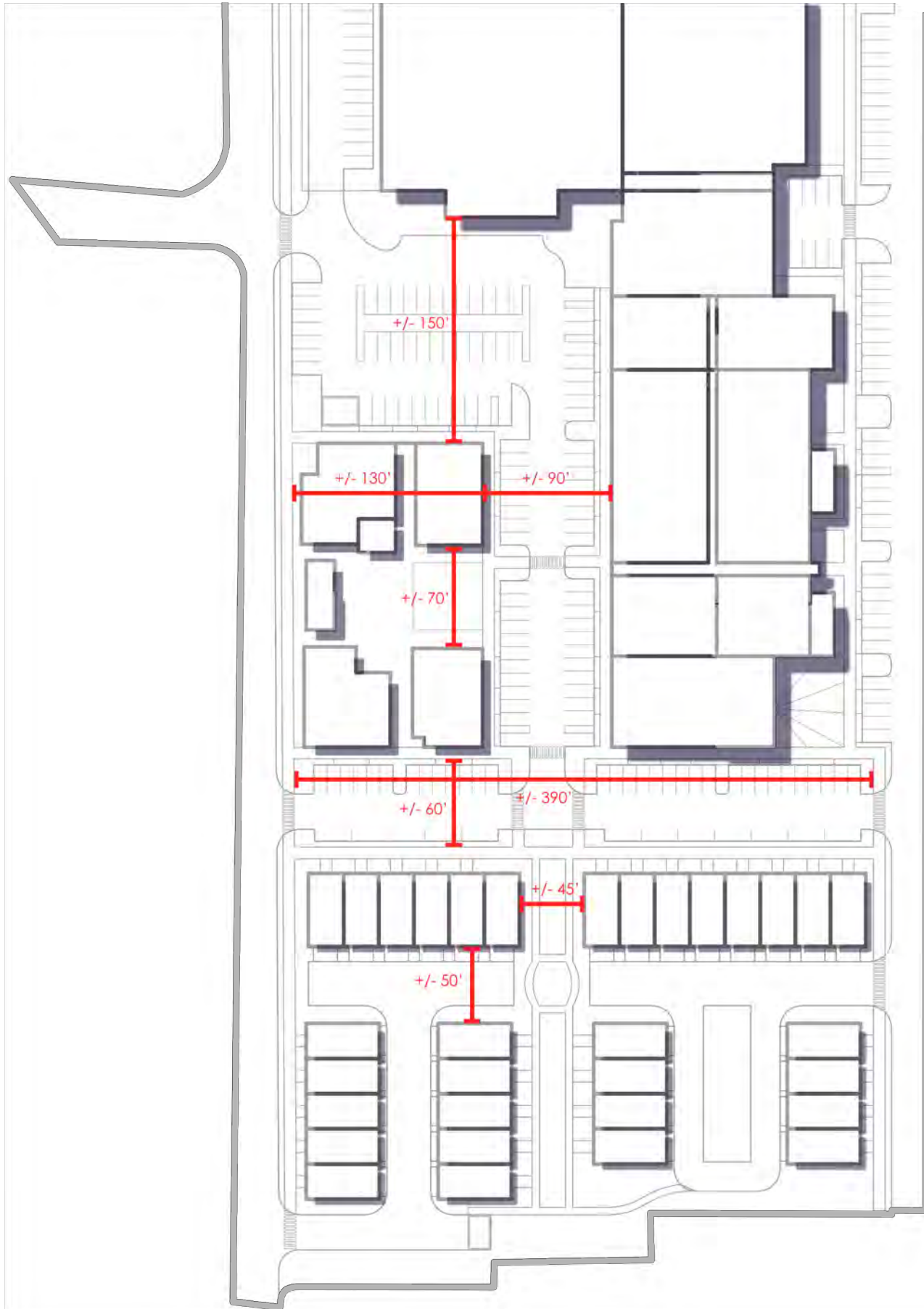
## DESIGN ELEMENTS

- (1) Ride Share Drop-off Lane
- (2) Gated Service Area (No Public Access)
- (3) Potential Outdoor Dining Location
- (4) Shared Open Space
- (5) Potential Dumpster Location
- (6) New Head in Public Parking (Typ.)
- (7) Landscape Islands (Typ.)
- (8) Subdivide Existing Building to Create Tenant Spaces/Front Doors Oriented to Hammond Street
- (9) New Internal Service Corridor (location may vary)
- (10) New Cross Street- Connects Hammond St. And Blaine St.
- (11) Parallel Parking on South Side of New Street
- (12) Residential Parking Access From Hammond St. And Blaine St. Only
- (13) Rear-Loaded Tuck-Under/ Garage Parking
- (14) Potential Location for Stormwater Management
- (15) Rear Access Alley for Residential Units Only
- (16) 10' Landscape Buffer
- (17) Stoops/ Front Doors of Residential Units (buildings must follow this orientation)
- (18) Mid-Block Pedestrian Connections (locations may vary)
- (19) New Pedestrian Crosswalks on Blaine St
- (20) Existing Mid-Block Crossing
- (21) Existing On-Street Parking

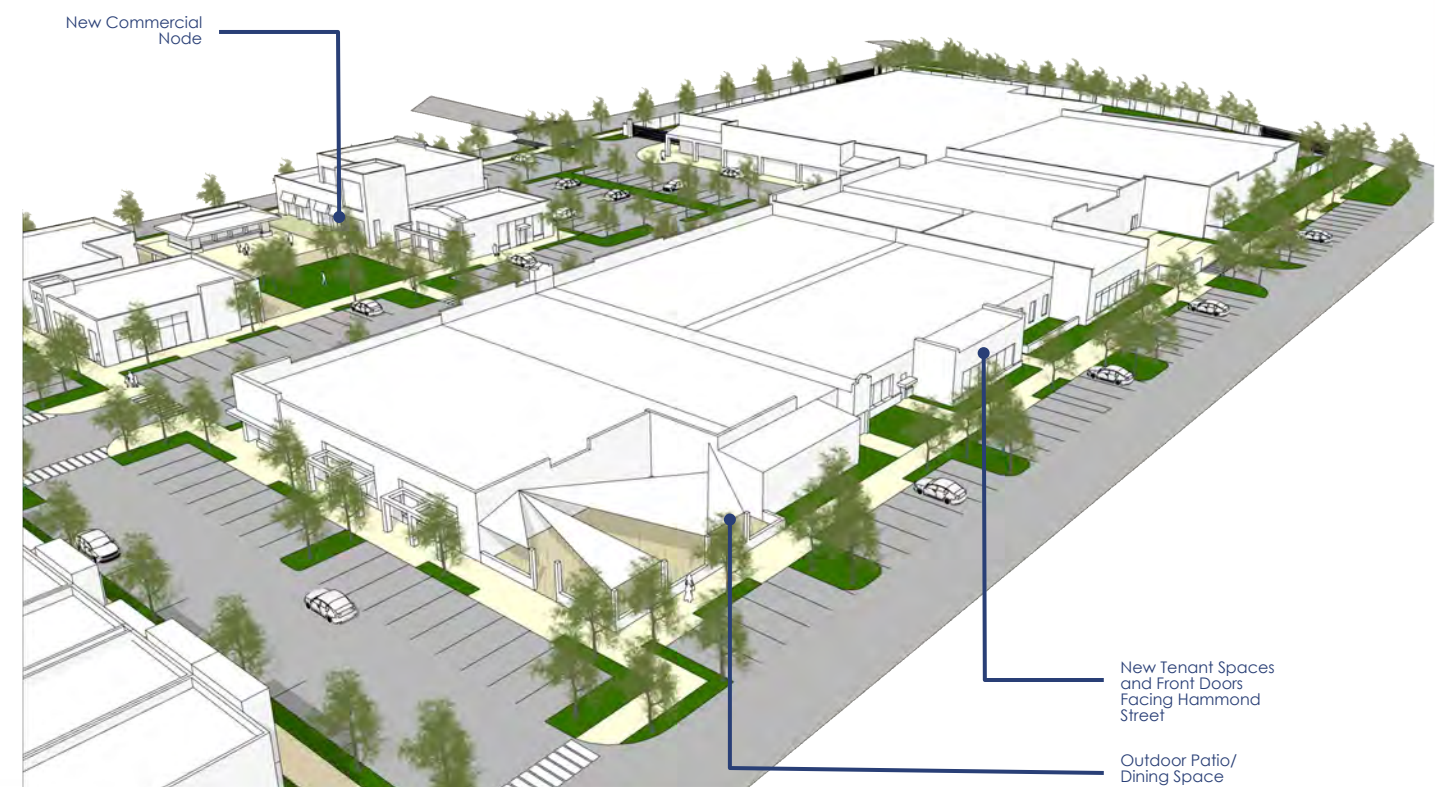
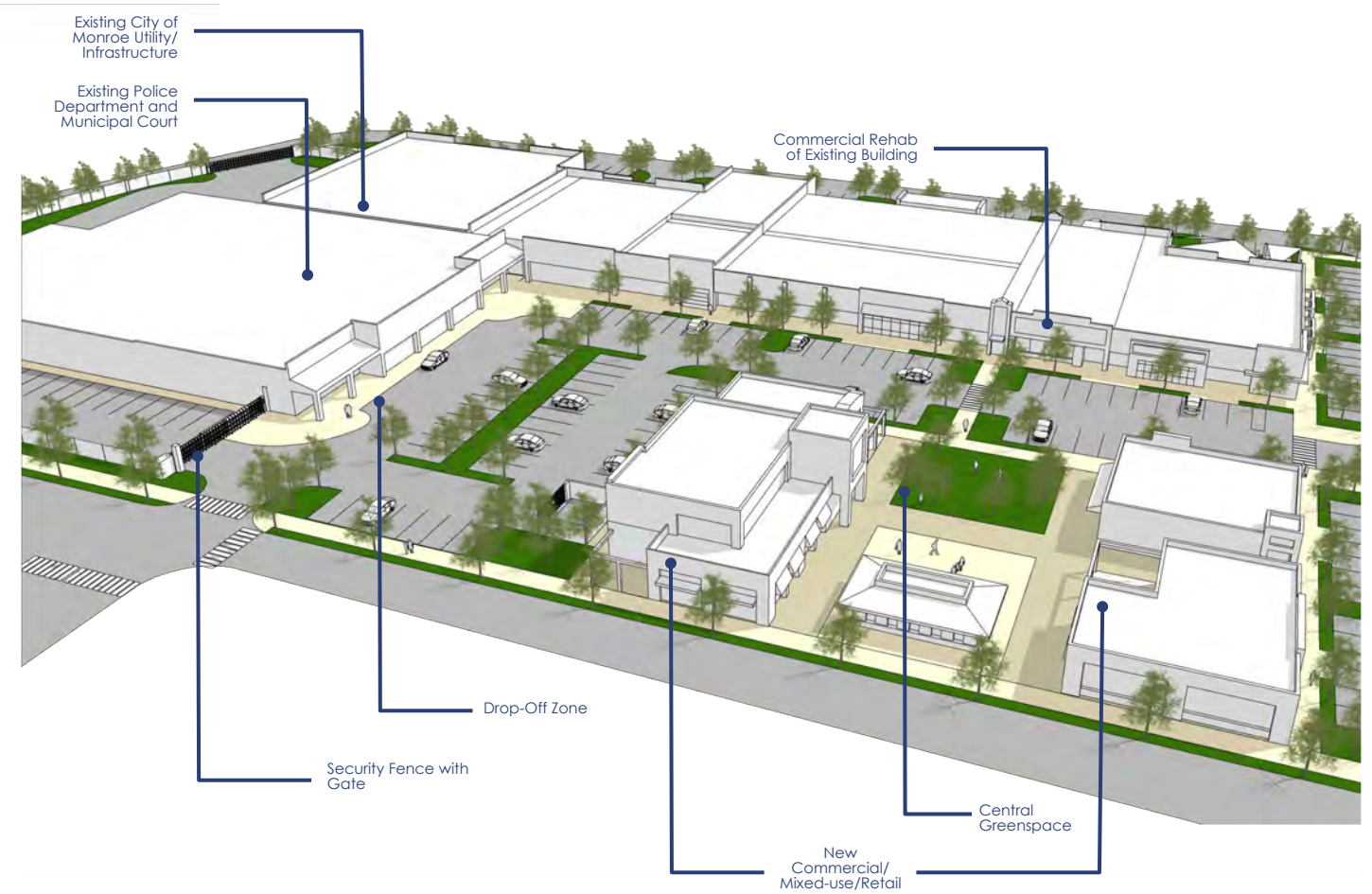




# CONCEPT DIMENSIONS

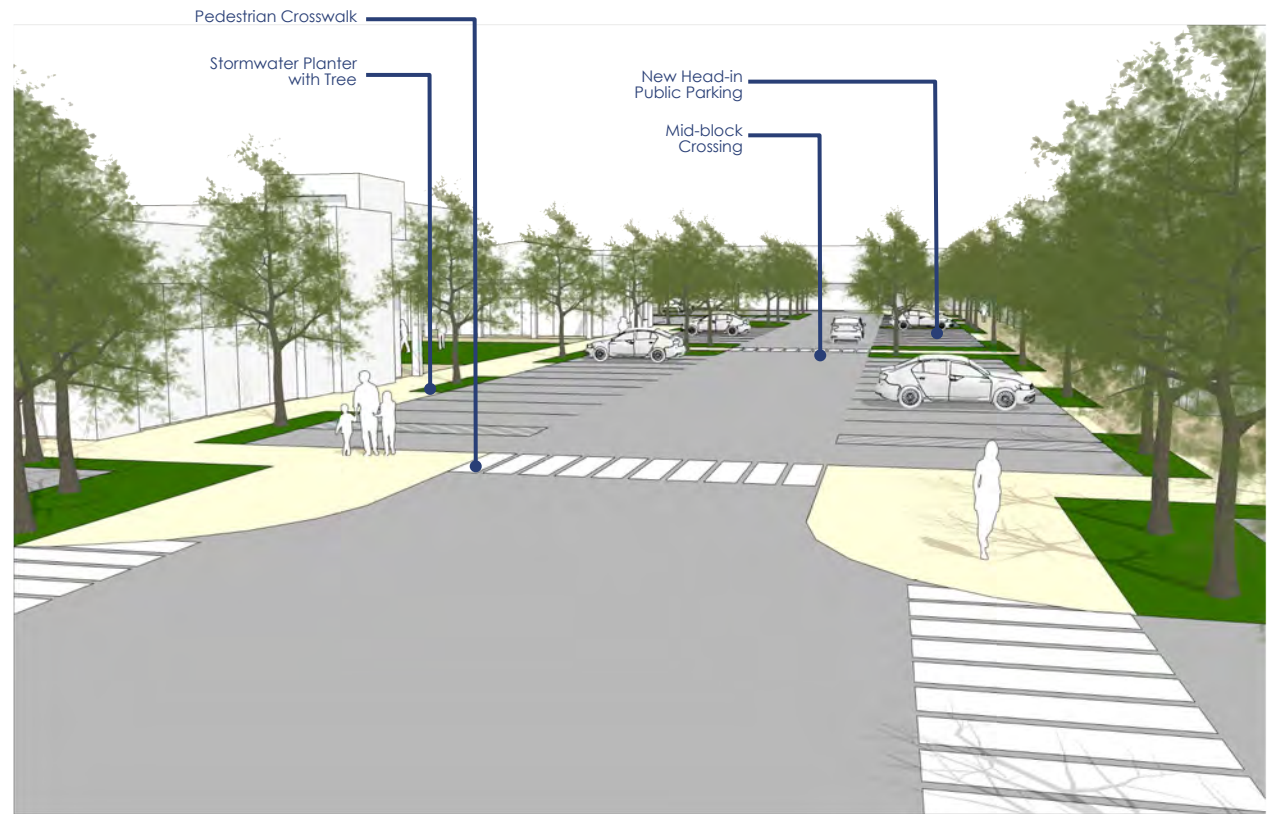


# 3D SITE MODEL



Development Concept is conceptual only, is not engineered and is not intended to convey specific architecture.

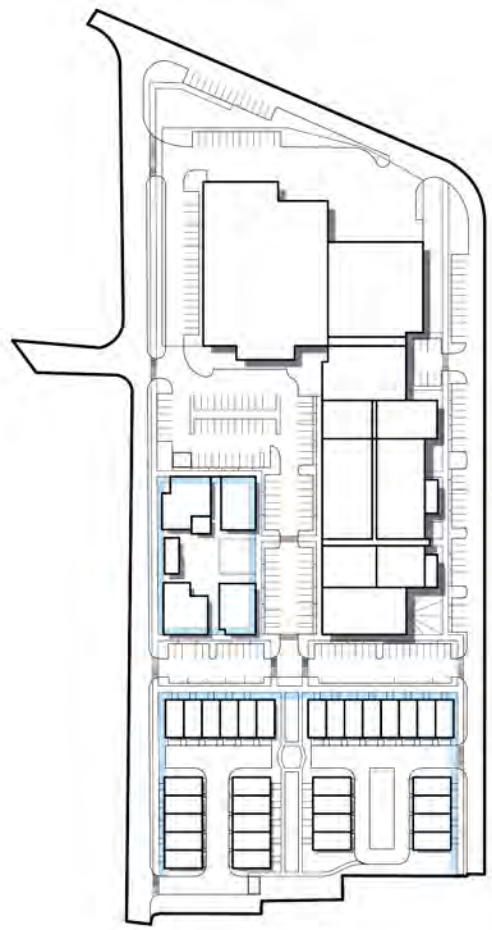




DEVELOPMENT CONCEPT

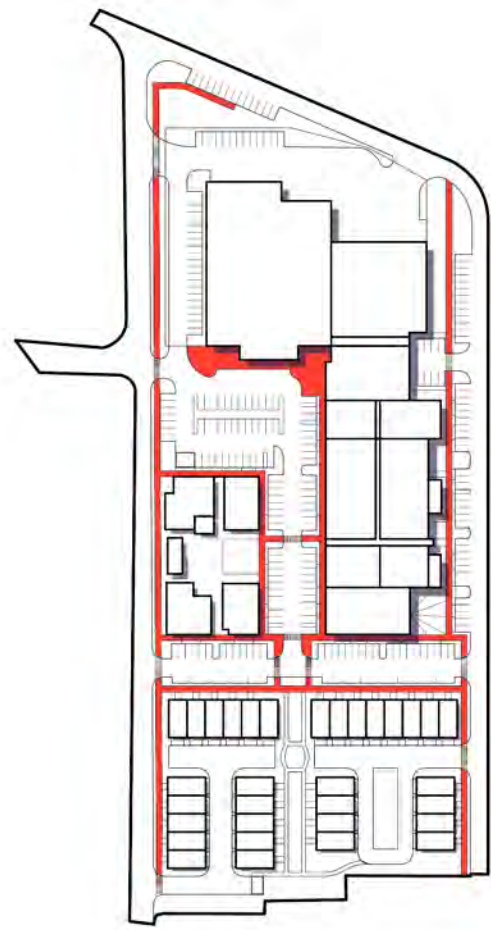
**3** CHAPTER 3  
DEVELOPMENT  
CONTROLS





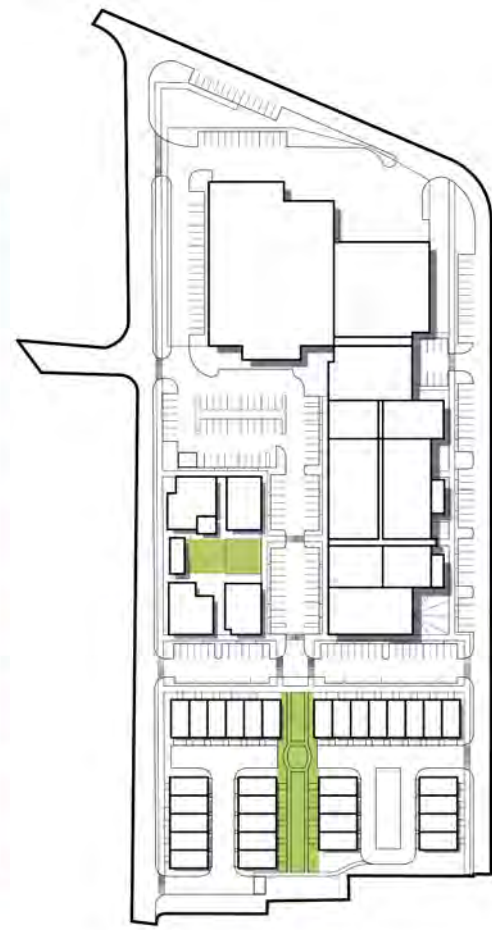
## BUILD-TO-ZONE

- 0-10' zone adjacent to all primary sidewalks
- Building facade must be within this zone



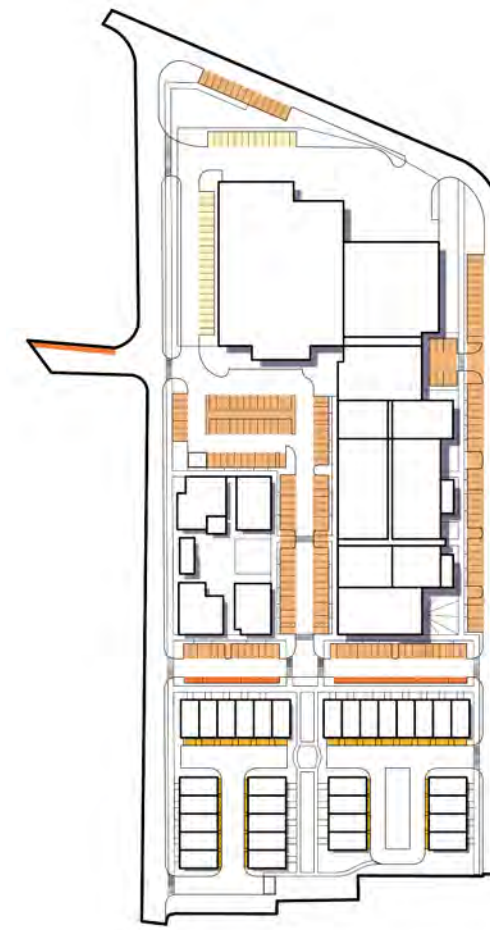
## SIDEWALKS

- Primary sidewalks (does not include secondary and residential area sidewalks)
- All primary sidewalks should be a minimum of 8'



## GREENSPACE

- Required public shared open space areas

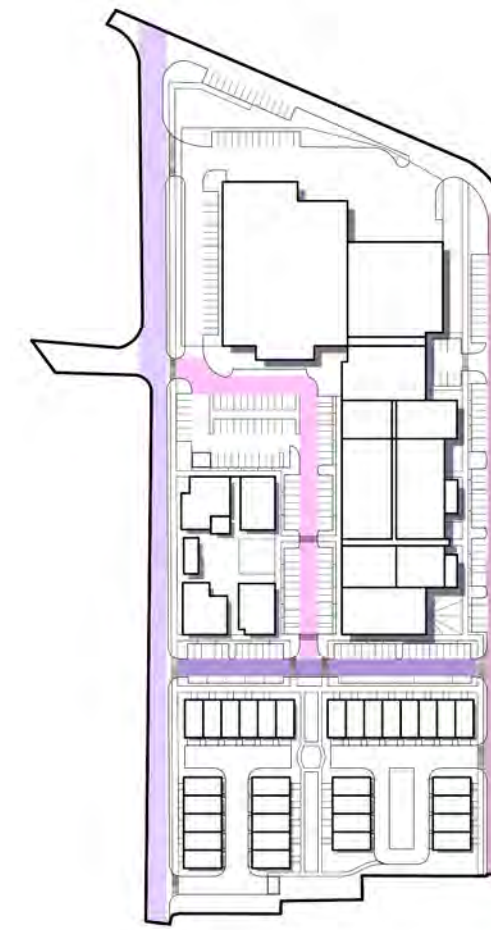


## PARKING

- Parking limited to these areas
- Shared parking is encouraged (see page 8)

- Head-in Parking = 174
- Parallel Parking = 12
- Tuck-under Garage = 32
- Police Dept. Only = 34

\*Edwards St provides 31 additional on-street parallel parking spaces



## STREET TYPES

- See Chapter 4 for street type sections

### Internal Streets

- Internal Type A
- Internal Type B
- Blaine
- Hammond



# SUBAREA MAP

- SUB AREA 1:  
Commercial Mixed Use
- SUB AREA 2:  
Residential Mixed Use
- SUB AREA 3:  
Commercial Reuse
- SUB AREA 4:  
Public Services



# SITE PLAN





# DEVELOPMENT CONTROLS



	SUBAREA 1: COMMERCIAL MIXED-USE	SUBAREA 2: RESIDENTIAL MIXED-USE
<b>New Commercial Development (gross area)</b>	12,000 - 24,000 square feet	0 - 12,000 square feet Ground Floor Live-Work Only
<b>New Residential Development</b>	0 to 15 units Upper floors only	28 to 56 units
<b>Building Height</b>	1 to 2 floors Roof top decks allowed	2 to 3 floors Roof top decks allowed
<b>Façade Length</b>	0 to 85 feet	0 to 200 feet
<b>Individual Tenant Size</b>	0 to 10,000 square feet	0 to 600 square feet Ground Floor Live-Work Only
<b>Build-To Zone</b>	0 to 5 feet As measured behind sidewalk	0 to 10 feet As measured behind sidewalk
<b>Shared Open Space</b>	Open Space Zones per Site Plan 4,000 square feet minimum	Open Space Zones per Site Plan 4,000 square feet minimum
<b>Parking</b>	Parking Zones per Site Plan 1.0 - 1.5 spaces per residential unit	Parking Zones per Site Plan 1.0 - 2.0 spaces per residential unit Head-in off Hammond allowed

	SUBAREA 3: COMMERCIAL RE-USE	SUBAREA 4: CITY OF MONROE EXISTING
<b>New Commercial Development (gross area)</b>	N/A - rehab of existing	existing only
<b>New Residential Development</b>	N/A - No residential allowed	existing only
<b>Building Height</b>	N/A - rehab of existing	existing only
<b>Façade Length</b>	N/A - rehab of existing	existing only
<b>Individual Tenant Size</b>	0 to 10,000 square ft	existing only
<b>Build-To Zone</b>	N/A - rehab of existing	existing only
<b>Shared Open Space</b>	N/A - rehab of existing	existing only
<b>Parking</b>	Parking Zones per Site Plan Head-in off Hammond allowed	Parking Zones per Site Plan Private Parking for Police / City Services only

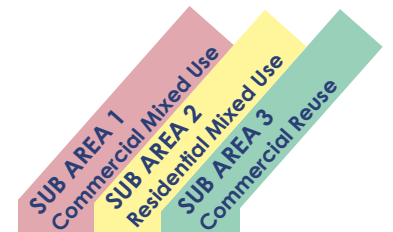
**NOTES:**

1. Areas are expressed in overall gross square footages
2. Build-To Zone is as measured behind sidewalks all Primary Sidewalks
3. Shared open space must be contiguous, consolidated and publicly accessible
4. Shared open space area calculation includes only space behind the back of Primary Sidewalks and does not include private dining patios
5. Minimum numbers in ranges represent a threshold requirement

6. No commercial parking is allowed in Subarea 2; Live Work and/or residential guest parking can be accommodated in parallel parking on Internal Type B
7. Live Work is defined as a business contained within a residential units and is owned and operated by the occupant of the same residential unit



# PERMITTED USES BY SUBAREA



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
<b>ACCESSORY BUILDINGS AND USES:</b>				
accessory apartments	X	C	X	
accessory dwelling units	X	C	X	
bed and breakfasts	X	C	C	
fuel dispensary, pump, island, and or canopy	X	X	X	
home occupations	X	P	X	
structures- general	X	C	C	
				<i>Regulated under Section 1000.9 of the Zoning Ordinance.</i>
temporary structures	P	P	P	
uses-general	X	C	C	
<b>ADMINISTRATIVE AND INFORMATION SERVICE FACILITIES:</b>				
administrative offices/processing center	P	X	P	
cell/telecommunications center	P	X	P	
data processing/ programming facilities	P	X	P	
<b>ALCOHOL AND BEVERAGE STORES:</b>				
beer and wine	P	X	P	
<b>AMUSEMENTS AND ENTERTAINMENT:</b>				
game center	P	P	P	
theaters, outdoor	P	P	X	
<b>ANIMAL FACILITIES AND SERVICES:</b>				
clinics and specialty service	P	P	P	<i>See development controls for tenant size limit</i>
animal/pet supply stores, retail	P	P	P	<i>See development controls for tenant size limit</i>
animal/pet supply stores	P	P	P	<i>See development controls for tenant size limit</i>
<b>ANTIQUE, CURIO, AND COLLECTIBLE SHOPS</b>				
ANTIQUE, CURIO, AND COLLECTIBLE SHOPS	P	P	P	
<b>APPAREL STORES, CLOTHING, AND ACCESSORIES</b>				
bridal, vintage, consignment	P	P	P	
new	P	P	P	
secondhand and thrift	P	P	P	
show repair, service	P	P	P	
tailoring and/ or dressmaking service	P	P	P	

Any uses not specifically listed require a Conditional Use Permit.



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
<b>ARTS, CRAFTS, AND HOBBIES:</b>				
art studio	P	P	P	
craftsman studio	P	P	P	
<b>AUDIO / VIDEO / COMPUTER EQUIPMENT:</b>				
supply stores, rental, and repairs	P	P	P	
supply stores, retail	P	P	P	
<b>BEAUTY SHOP / SERVICES:</b>				
barber, hairdresser, and/or stylist shops	P	P	P	
beauty supply retail	P	P	P	
beauty /health supplies	P	P	P	
manicure establishment	P	P	P	
tanning centers	P	P	P	
<b>BOOK, NEWS, MAGAZINE STORES, RETAIL</b>				
BOOK, NEWS, MAGAZINE STORES, RETAIL	P	P	P	
<b>BUILDING, CONSTRUCTION AND SPECIAL TRADE FACILITIES</b>				
contractor and developer offices	P	P	P	<i>Architecture must be consistent with desired style.</i>
<b>CATERING ESTABLISHMENTS, RETAIL, AND RENTAL</b>				
CATERING ESTABLISHMENTS, RETAIL, AND RENTAL	P	P	P	
<b>CHILDCARE FACILITIES:</b>				
child-care, center	X	X	C	<i>Defined in the Zoning Ordinance as 7 or more children</i>
child-care, home	X	C	X	<i>Defined in the Zoning Ordinance as 6 or less children</i>
<b>CHURCHES:</b>				
community	X	X	X	
megachurch	X	X	X	
neighborhood	P	X	P	
COLLECTION AGENCY	X	X	P	<i>Only permitted on Hammond Drive.</i>
<b>COMMUNITY ASSOCIATIONS/ CLUBS-CIVIC AND PRIVATE</b>				
COMMUNITY ASSOCIATIONS/ CLUBS-CIVIC AND PRIVATE	P	P	P	
<b>CONFECTIONERY AND DESSERT SHOPS, RETAIL</b>				
CONFECTIONERY AND DESSERT SHOPS, RETAIL	P	P	P	
<b>COPY AND BLUEPRINT SHOPS</b>				
COPY AND BLUEPRINT SHOPS	P	P	P	

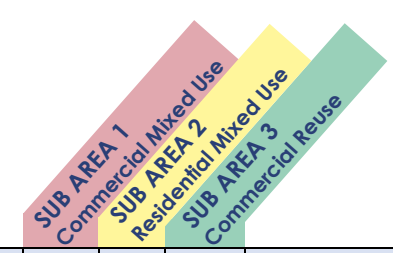
Any uses not specifically listed require a Conditional Use Permit.

# PERMITTED USES BY SUBAREA



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
DEPARTMENT / DISCOUNT DEPARTMENT STORES, RETAIL	P	P	P	See development controls for size limit.
DETECTIVE AGENCY	P	P	P	
DRUG STORES, RETAIL	P	P	P	
EDUCATIONAL FACILITIES				
schools private, public, parochial	X	C	C	See development controls for size limit.
school programs-day, pre-,post-	P	X	C	See development controls for size limit.
studios for work or teaching or fine arts	P	P	P	See development controls for size limit.
photography, music,drama,dance, martial arts	P	P	P	See development controls for size limit.
FABRIC AND NOTION SHOPS, RETAIL	P	P	P	
FINANCIAL INSTITUTIONS-BANKS, SAVINGS/LOANS				
with/without drive thru window	X	X	X	
automatic teller machine only	C	X	C	Only if integrated, not stand-alone
FLORIST AND PLANT SHOPS, RETAIL	P	P	P	
FUNERAL AND INTERMENT ESTABLISHMENTS				
storage and undertaking, mortuary, and/or funeral home	X	X	X	
GIFT,CARD, AND STATIONARY SHOPS, RETAIL	P	P	P	
GROCERS, RETAIL				
convenience food stores	P	P	P	See development controls for size limit.
delicatessens,bakery, specialty	P	P	P	
grocery markets	P	P	P	See development controls for size limit.
health food	P	P	P	
HEALTHCARE, SERVICE-DENTAL, MEDICAL, ETC.				
clinics (day service only)	X	X	C	
convalescent care, nursing, rest homes	X	X	X	
hospital and laboratories	X	X	X	
person care homes, family	X	C	X	
personal care homes, group	X	X	X	
congregate private offices	X	X	X	

Any uses not specifically listed require a Conditional Use Permit.



	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse	
INTERIOR DESIGN AND DECORATING ESTABLISHMENTS:				
china,clock, frame and/or rug shops	P	P	P	
retail floor covering, retail, and service	P	P	P	
furniture and furnishings stores	P	P	P	
retail hardware and paint stores	P	P	P	
retail kitchen supply stores, retail	P	P	P	
kitchen supply stores, rental	P	P	P	
linen and drapery, retail and service	P	P	P	
wallpaper, retail, and service	P	P	P	
JEWELRY STORES, RETAIL	P	P	P	
LAUNDRY AND/OR DRY CLEANING ESTABLISHMENTS:				
drop and pick up	X	X	X	
stations full-service	X	X	X	
self-service,public	X	X	X	
LAWN AND GARDEN ESTABLISHMENTS:				
supply and equipment, retail and rental	X	X	X	
greenhouse and plant nursery	X	X	X	
LODGING				
bed and breakfast inns	X	C	X	
hotels	X	X	X	
inns	C	C	X	
MERCANTILE AND DRY GOOD STORES, RETAIL	P	P	P	See development controls for size limit.
MEDIA FACILITIES, PRINT, AND ELECTRONIC:				
film and internet production offices	X	P	P	See development controls for size limit.
newspaper offices	X	P	P	See development controls for size limit.
publishing and printing establishments	X	X	X	
MOTOR VEHICLES AND EQUIPMENT:				
car wash, service, or self service	X	X	X	
fuel sales	X	X	X	
general service/ installation of parts/ access	X	X	X	
new or used, sales, and rental	X	X	X	
light duty trailer sales, new-accessory use	X	X	X	
parts/accessories	X	X	X	
sales tires, sales	X	X	X	
MUSICAL INSTRUMENT SHOP, RETAIL	P	P	P	

Any uses not specifically listed require a Conditional Use Permit.

DEVELOPMENT CONTROLS

# PERMITTED USES BY SUBAREA

	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse
<b>OFFICE PARKS:</b>			
medical office parks	X	X	X
professional office parks	X	X	X
<b>OFFICE SUPPLY STORES,RETAIL</b>			
	P	P	P
<b>OPTICAL SUPPLY STORES, RETAIL</b>			
	P	P	P
<b>PARKING, COMMERCIAL-PRIMARY USE:</b>			
garages	X	X	X
lots	X	X	X
<b>PARKS AND RECREATION:</b>			
health/fitness center	P	P	P
gymnasium	X	X	X
neighborhood activity center-accessory use	X	P	P
parks, active	X	X	X
parks, passive	P	P	P
<b>PHOTOGRAPHY:</b>			
supply and processing stores, sales/service	P	P	P
<b>PROFESSIONAL OFFICES</b>			
	P	P	P
<b>PUBLIC BUILDINGS</b>			
government offices, libraries, museums	P	P	P
conventional hall, community center	P	P	P
<b>RECREATIONAL EQUIPMENT STORES, REPAIR AND RENTAL</b>			
	P	P	P
<b>RECREATIONAL EQUIPMENT/SUPPLY STORES, RETAIL</b>			
	P	P	P
<b>RESIDENTIAL:</b>			
accessory apartments	P	P	X
accessory dwellings	X	P	X
apartment buildings	X	P	X
apartment houses	X	P	X
lofts	P	P	X
single-family dwellings	X	X	X
townhomes	X	P	X
<b>RESTAURANT:</b>			
restaurant/café, grill, lunch counter	P	P	P

Any uses not specifically listed require a Conditional Use Permit.

	SUB AREA 1 Commercial Mixed Use	SUB AREA 2 Residential Mixed Use	SUB AREA 3 Commercial Reuse
<b>SALES AND SERVICE FACILITIES:</b>			
appliance stores (small and large), retail, rental, and/or repairs	P	P	P
equipment (small and large), servic, and rental	P	P	P
equipment (offcie), service, and rental	P	P	P
cleaning services janitorial/cleaning supplies	P	P	P
store,wholesale lawn and garden supply	P	P	P
<b>TELECOMMUNICATIONS FACILITIES:</b>			
mobile telephones/ paging, retail, and service	P	P	P
satellite dishes,retail	X	X	X
			Regulated under Section 1000.9 of the Zoning Ordinance.
<b>TEMPORARY BUILDINGS</b>			
	P	P	P
<b>TOY, VARIETY, NOVELTY,AND DIME STORES, RETAIL</b>			
	P	P	P
<b>TRAVEL AGENCIES</b>			
	P	P	P
<b>UTILITY AND AREA SERVICE PROVIDER FACILITIES:</b>			
police, ambulance	X	X	X
television stations	X	X	X
utility transformers, substations, and towers	X	X	X
parking, temporary event	P	P	P

**NOTES:**

1. Any uses not specifically listed require a Conditional Use Permit
2. See City of Monroe Zoning Ordinance for definitions of individual uses

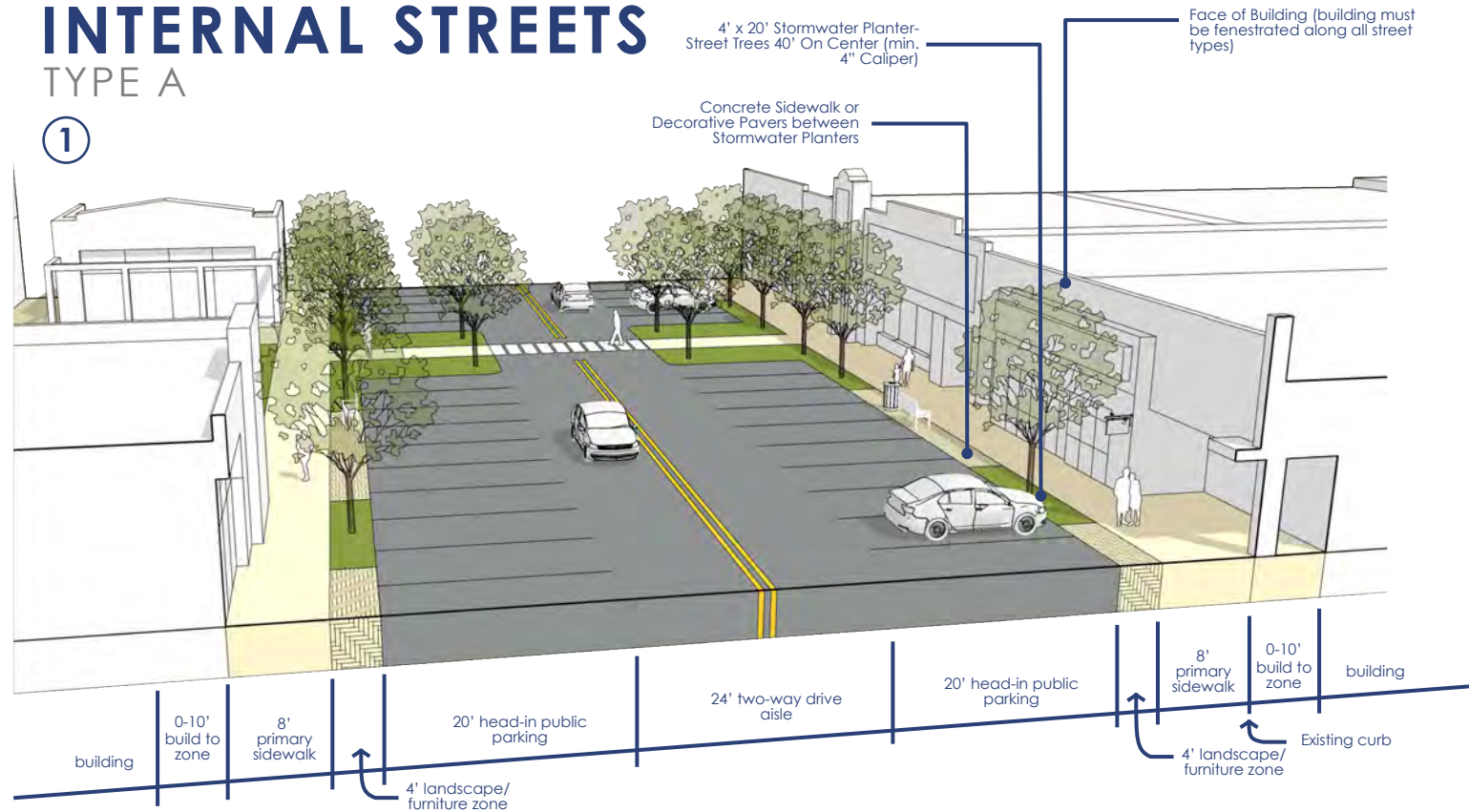


**4** CHAPTER 4  
STREETSCAPE  
STANDARDS

# INTERNAL STREETS

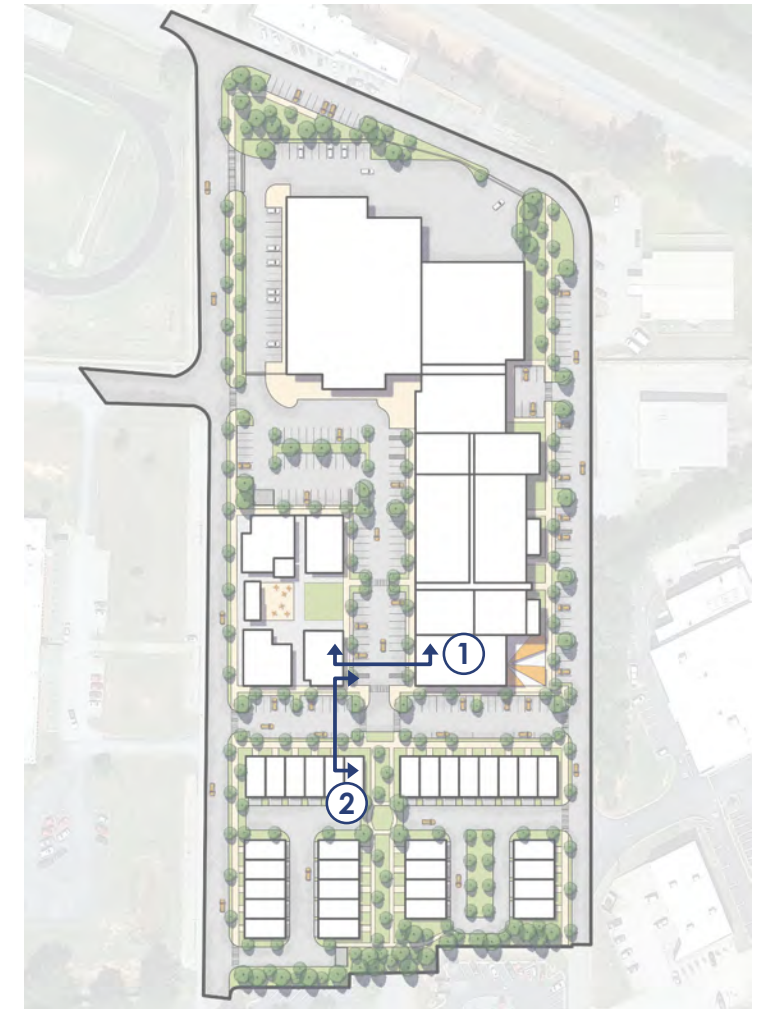
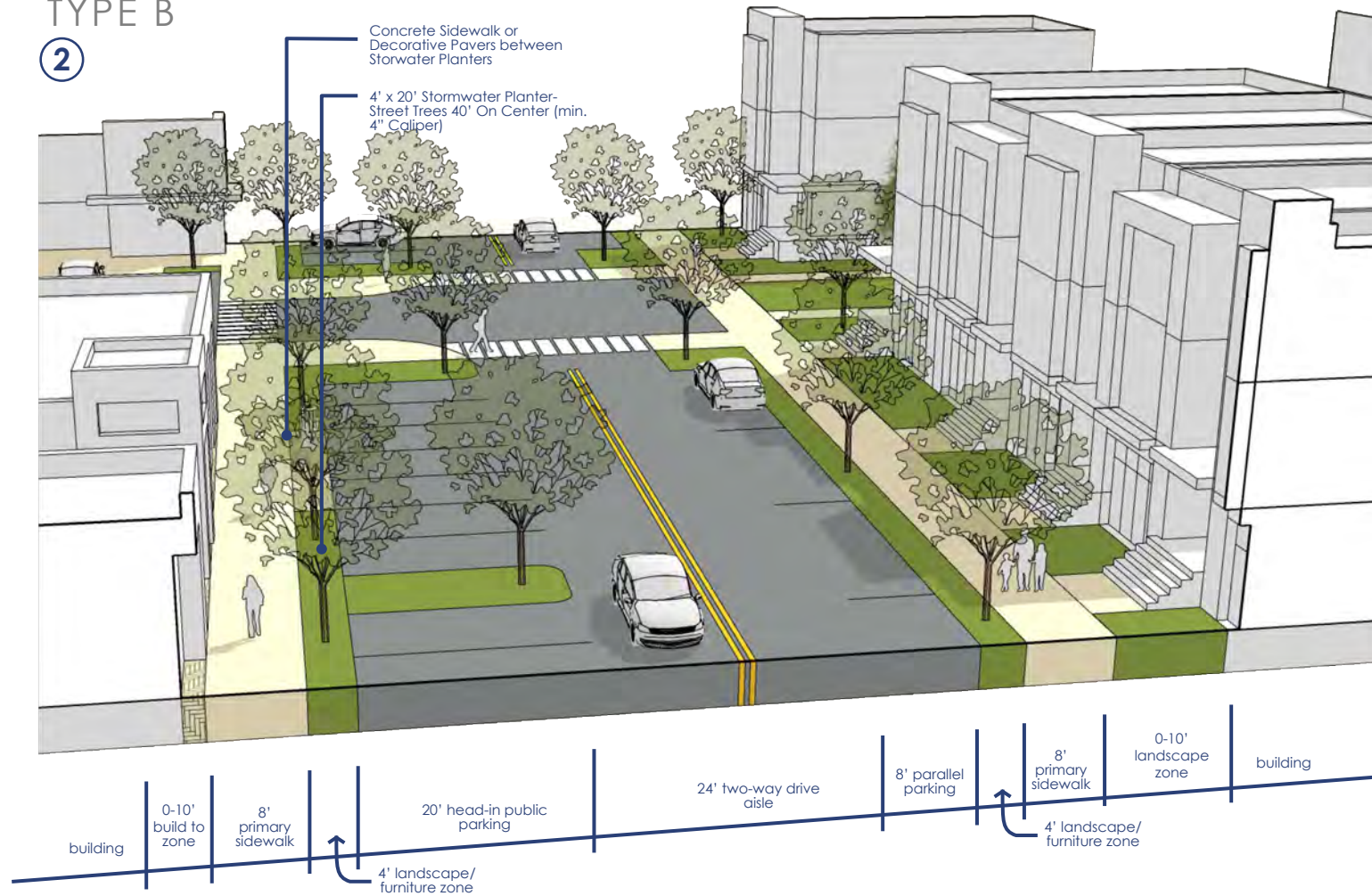
## TYPE A

1



## TYPE B

2



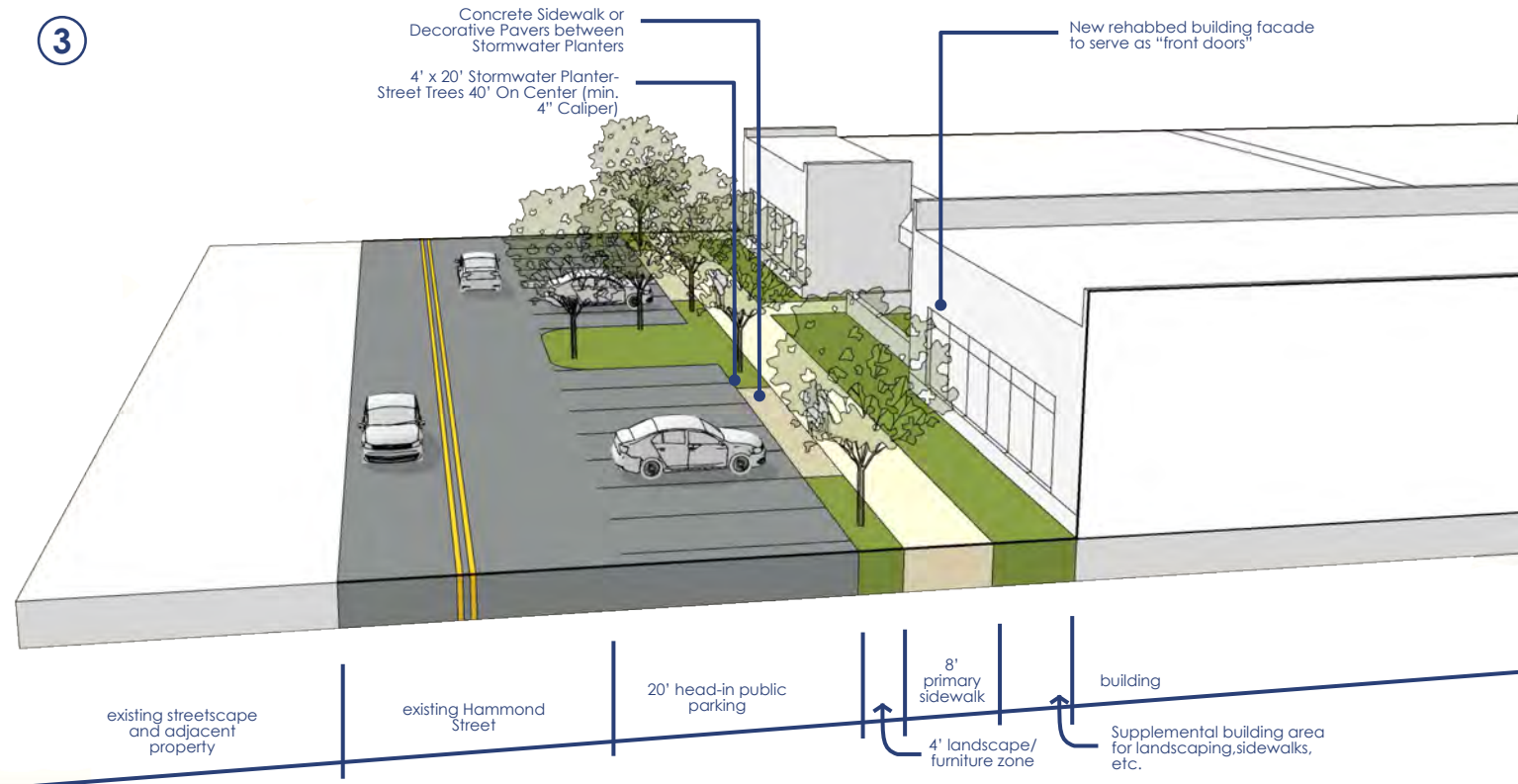
STREETSCAPE STANDARDS



# EXTERNAL STREETS

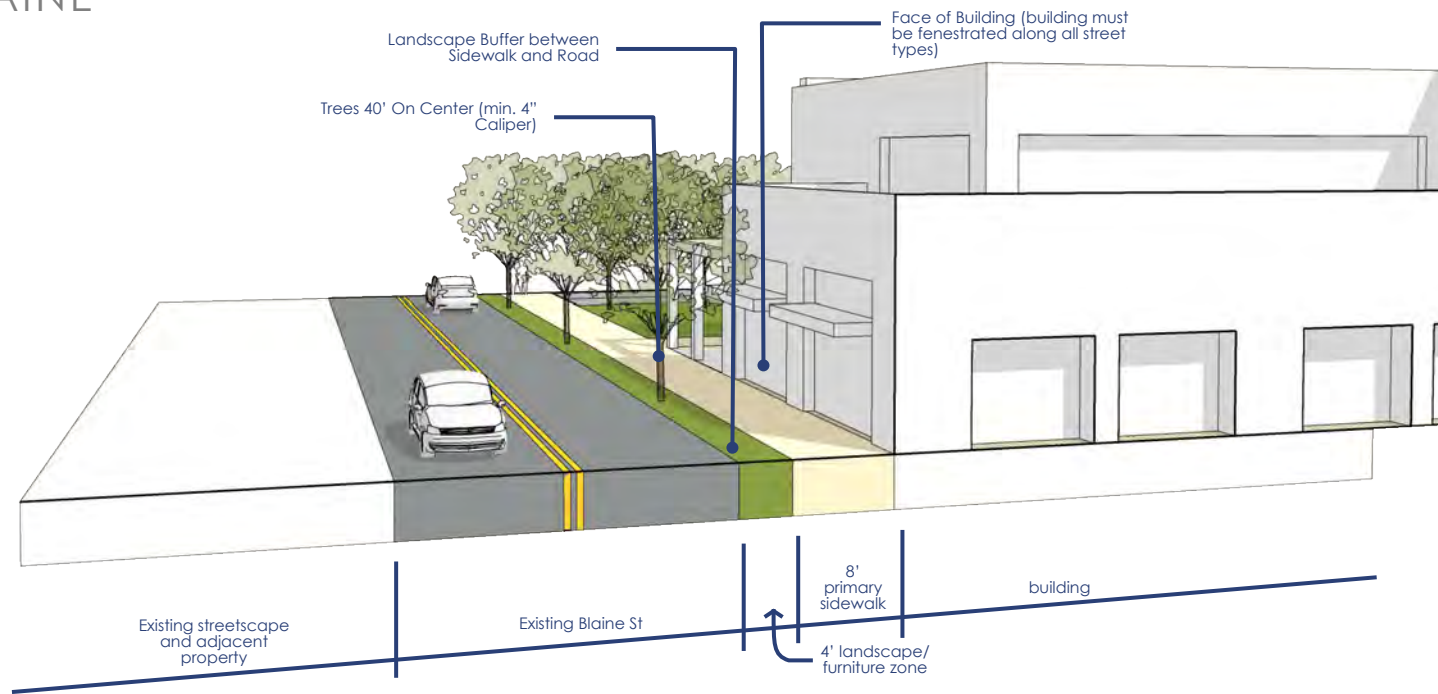
## HAMMOND-SUBAREA 2

3



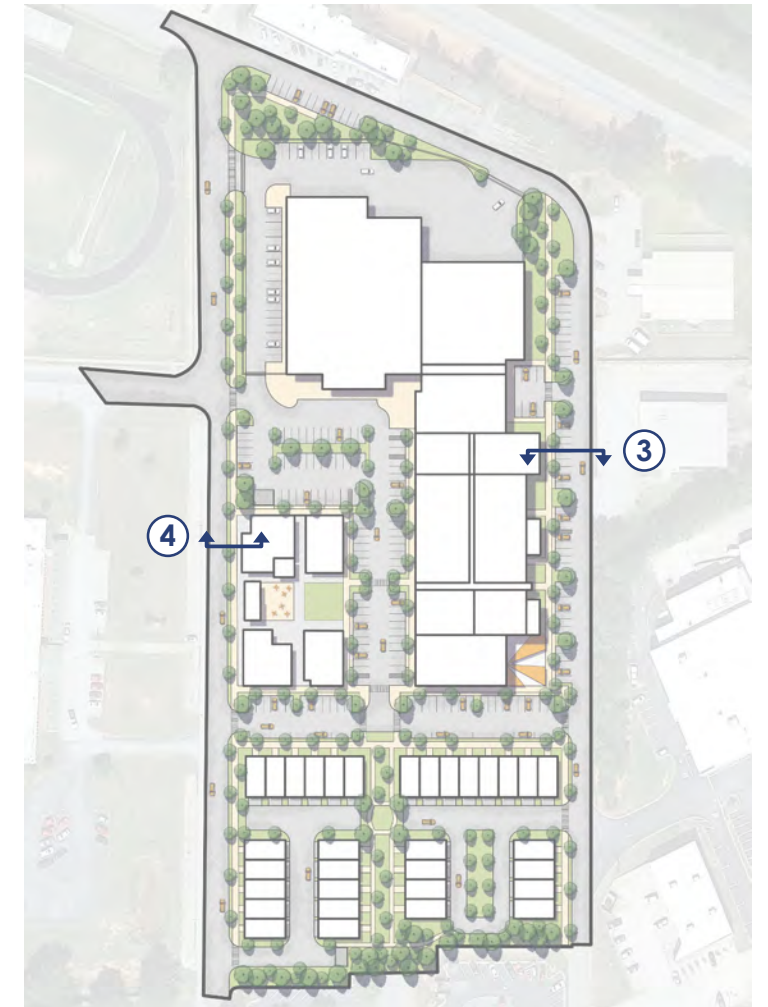
## BLAINE

4



KEY PLAN

KEY PLAN





**5** CHAPTER 5  
DESIGN FEATURES



# COMMERCIAL MIXED-USE ARCHITECTURAL STYLE

The desired architectural style is a simplified, contemporary feel with relatively clean lines and a modern aesthetic without being "ultra modern" or overly austere. Traditional and/or ornamental styles that attempt to mimic an historic "main street" aesthetic are discouraged in order to create a district that is differentiated from Downtown Monroe.

## BUILDING MASSING

New commercial/mixed-use buildings should be kept to relatively simple forms, should utilize small footprints and should be designed to emphasize and differentiate individual tenants/vertical bays. Repetitive, continuous facades are discouraged.

## PREFERRED



Example of simple building form with minimal ornamentation



Example of extensive use of building fenestration



2



Each tenant has a defined storefront breaking up the overall building mass



3

Clear delineation of individual tenants



6



7

Example of simple building form with minimal ornamentation



8

Example of extensive use of building fenestration

## DISCOURAGED



9

Avoid the use of traditional detailing such as arch top windows



11

Avoid historic "main street" feel



10

Avoid long unbroken cornice lines



12

Example of a building lacking differentiation from bay to bay



# RESIDENTIAL MIXED-USE

## ARCHITECTURAL STYLE

The desired architectural style is a simplified, contemporary feel with relatively clean lines and a modern aesthetic without being "ultra modern" or overly austere. Traditional and/or ornamental styles that attempt to mimic an historic aesthetic are discouraged in order to create a district that is differentiated from Downtown.

## BUILDING MASSING

New residential/live-work buildings should be kept to relatively simple forms, should be designed to emphasize and differentiate individual units/vertical bays. Repetitive, continuous facades are discouraged.



Example of simple building form with minimal ornamentation



Clean, modern aesthetic and simple lines



Live-work units encouraged



Emphasis on vertical proportions

## PREFERRED



Example of simple building form with minimal ornamentation



## DISCOURAGED



Avoid traditional styling and details



Avoid long unbroken cornice lines that emphasize horizontal proportions



Avoid traditional styling and details



Avoid traditional styling and details



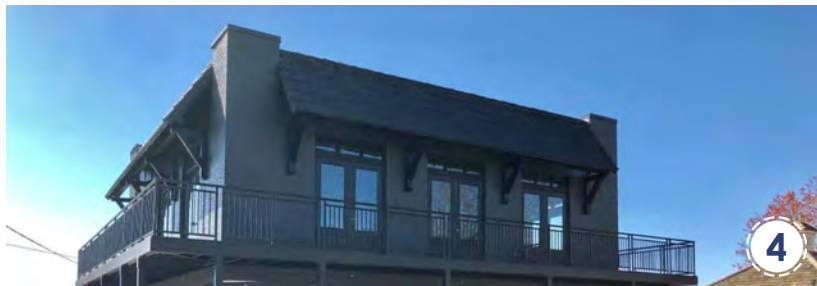
Avoid detached single-family development in favor of higher density options



# ROOF STYLE

For both commercial and residential buildings, parapet/flat/shallow pitch roofs are preferred as a means to de-emphasize the form and mass of the roof as seen from the ground. Heavy use of gables, hips, dormers and overhangs is discouraged.

## PREFERRED



## DISCOURAGED





# MATERIALS + DETAILS

Materials and detailing should be in keeping with a clean, simple contemporary style but should not be "ultra contemporary" or too austere. Painted brick or muted color brick is the preferred dominant material and can be augmented with other secondary materials (other than wood, stone or vinyl). Traditionally styled details and ornamentation such as brackets, distressed or Georgia Red brick, double hung windows, lap siding, molding, etc. are discouraged. Muted color palettes are preferred over bright colors.



4



10

Encourage simple and sleek awnings/ overhangs



11

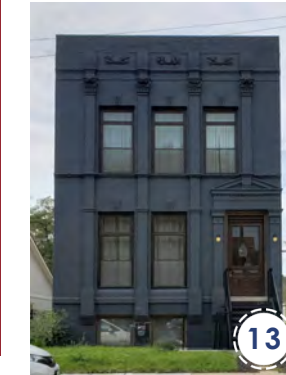
Encourage glass storefronts when possible

# DISCOURAGED



12

Use of bright colors is discouraged



13

Avoid monolithic color palettes



14

Avoid exposed wood details

# PREFERRED



1

Simple detailing and muted color palette



5

Encouraged use of color as an accent element



6

Encouraged window style



2



7



8

Encourage simple and sleek awnings/ overhangs



3



9



15

Avoid double hung windows



16

Avoid clad siding



17

Avoid rustic stone and wood material combinations



18

Avoid metal siding or buildings



19

Avoid over use of stucco/EIFS or similar



20

Avoid exposed wood details

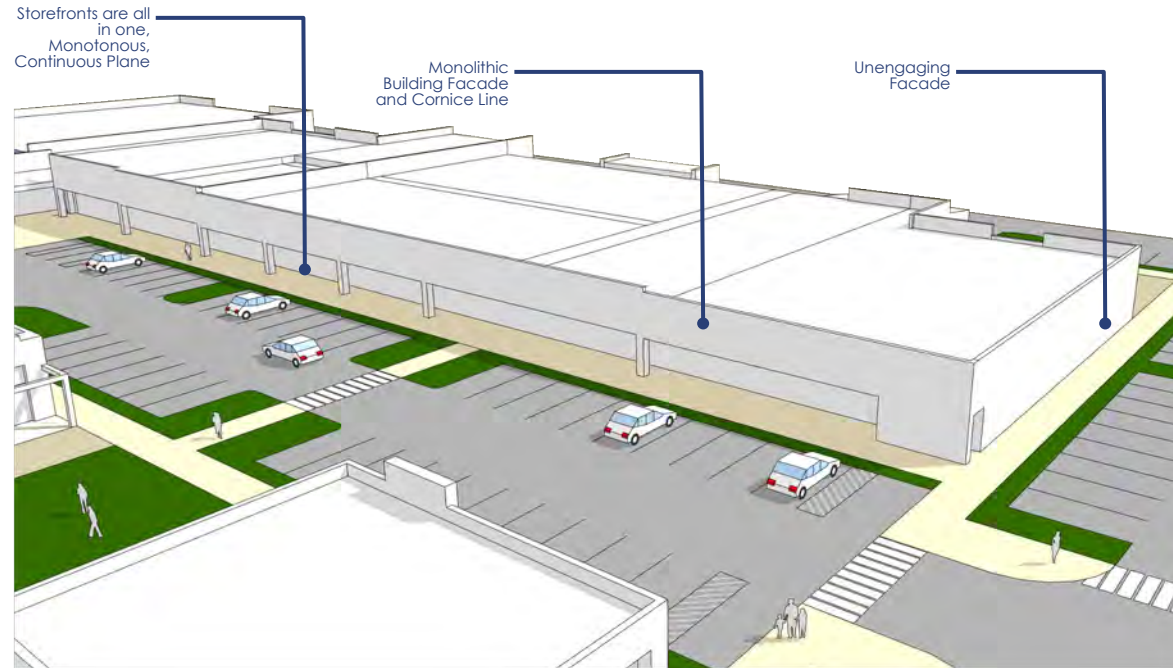


# COMMERCIAL REHAB

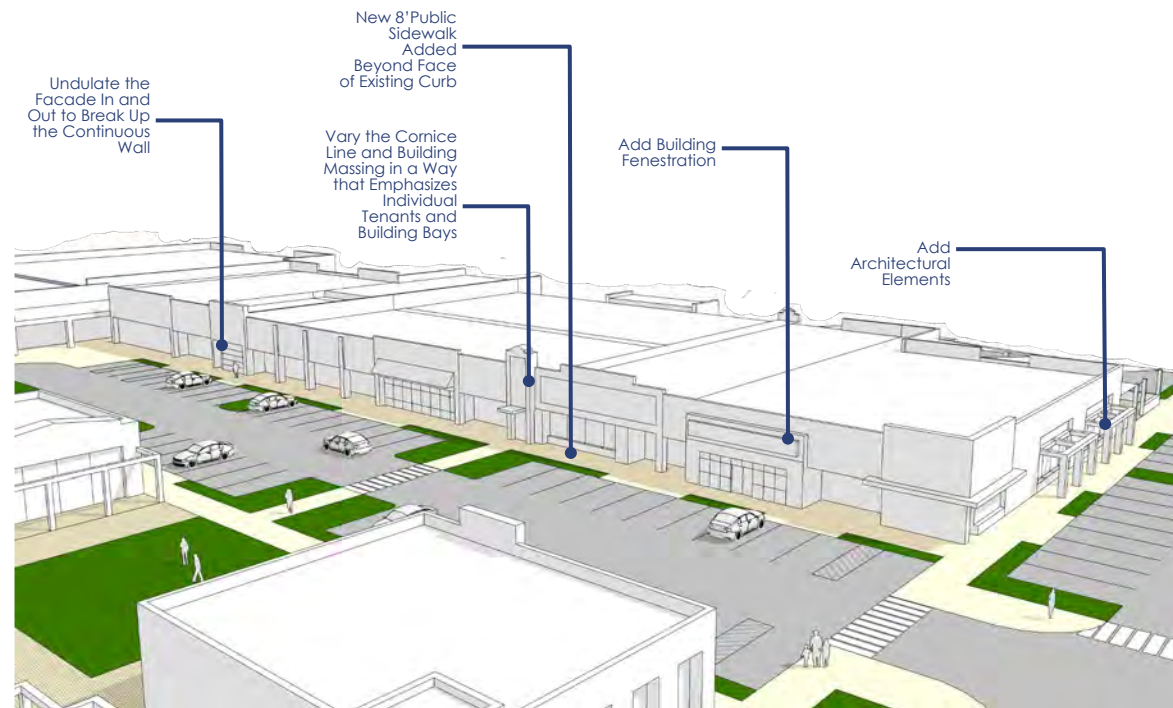
The existing commercial building should be rehabbed in a way that reflects the overall vision and desired attributes for the site. Added architectural elements should be consistent with the overall architectural style and use similar materials.

The key goal for rehabbing the existing building is creating less monolithic, and more differentiated spaces. This goal can be achieved by adding building fenestration, bringing the storefronts out to the pedestrian, adding more engaging outdoor elements, and breaking up the facade both horizontally and vertically.

EXISTING BUILDING FACADE



POTENTIAL BUILDING FACADE



## PREFERRED



Roll up doors can be used to create a connection between indoors and outdoors



Example of opening the building overhang to engage the pedestrian



Add landscape, furniture, and other engaging elements where appropriate



## DISCOURAGED



Avoid traditional/historic aesthetics and styling



Include outdoor dining space where possible and appropriate



Avoid creating a "strip center" feel by avoiding consistent, repetitive bays

DESIGN FEATURES



# SHARED OPEN SPACES

Shared public open spaces (locations and sizes as per the development controls) should be open-air, accessible and open to the public. Spaces should be relatively simple and flexible in design so as to allow a wide variety of programmed and ad-hoc activities. Adjacent buildings should be mindful in how doors, windows and seating areas are located so as to maximize visibility/activity. Landscaping should be used to soften open spaces and make them more attractive. Extensively manicured plantings or over use of landscaping should be avoided in order to mitigate maintenance issues. Materials should durable and permanent. Shared open spaces should not be walled or gated in any way that discourages public use (other than during late evening hours if needed security). In addition to Shared Open Spaces, additional private outdoor dining is also encouraged.

## PREFERRED



4 Encourage small, flexible active recreational uses in open spaces



Encourage engaging storefronts with tables, planters, etc.



Encourage linear open spaces between residential buildings for added greenspace

## DISCOURAGED



Avoid structures and displays that lack a feel of permanence



Avoid open spaces that lack flexibility of use and/or require significant maintenance



Entirely fenced openspaces are not permitted in public spaces



# PLACEMAKING

Placemaking features should be engaging, pedestrian-oriented, and consistent with the vision of the site as a whole. The placement of these features should be primarily in public spaces and used to encourage activity in public areas. Sight lines and view sheds should be considered when determining placement. Features can be static or interactive. Rotating art pieces, temporary exhibits, and community events are appropriate.

Although appropriate placemaking strategies, some features are more consistent with other character areas around Monroe and are discouraged on this site.



1



5

Small scale water features are appropriate



6

Example of appropriate residential only placemaking features including furniture, water features, and small gazebos/shade structures

## PREFERRED



2

Example of interactive public element



3

Use lighting to create a sense of place at night



7



8



4



9

## DISCOURAGED



10

Structured play equipment is discouraged in public areas



11

DESIGN FEATURES



# SIGNAGE

## SIGNAGE TYPES

The signage within this development should seek to enhance the identity and pedestrian experience. Signage should generally follow the City of Monroe Zoning Ordinance Article XII- Signs with a few exceptions.

Exceptions:

1. In subarea 1, more than one wall sign per a building is suitable for buildings that have frontage on numerous sides. Only one wall sign is allowed per a wall.
2. Ground and monument signs for individual buildings are not permitted.
3. A wall sign's area shall not be larger than 10% of the frontage wall area of the facade of the story which is occupied by the business or 100 square feet, whichever is less.
4. In subarea 4, multiple wall signs shall be allowed with a total sign area not to exceed an aggregate of 240 square feet per wall.

Entry signage, vertical and horizontal blade signs, wall signs on building facade, and standalone way-finding signage are all acceptable sign types. However, vertical and horizontal blade signs are encouraged for individual tenants. Monument signs are only permitted as district-wide branding.

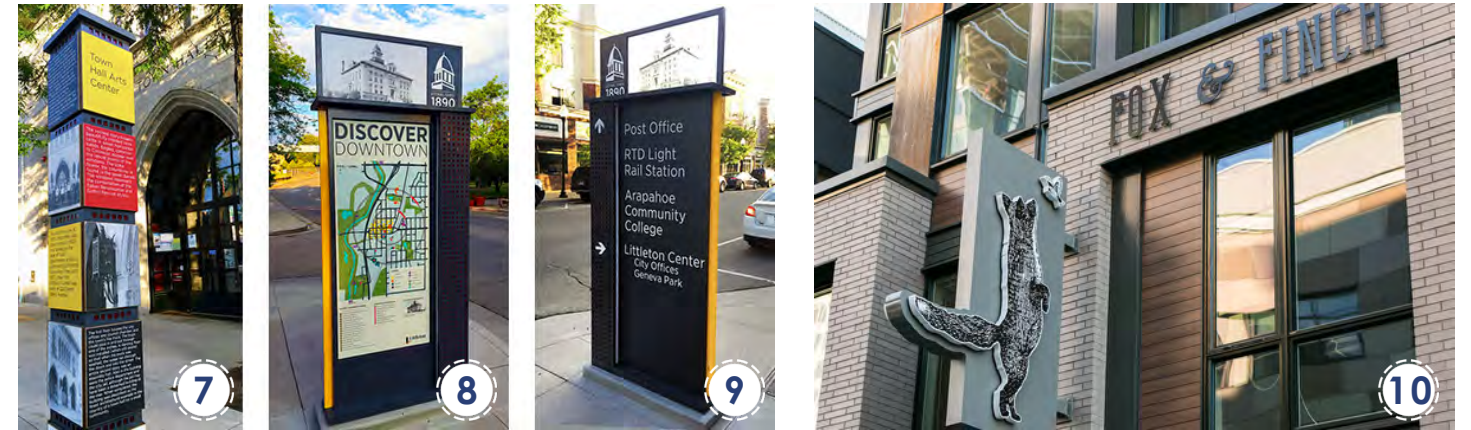
## PREFERRED



## MATERIALS

Signage materials should be consistent and complimentary to the architectural style of the building to which it identifies. All signage should follow the City of Monroe Zoning Ordinances Article XII- Signs regarding materials. All signs shall be clean, simple, and easily legible. Avoid materials such as exposed wood.

Pedestrian scaled wayfinding signs are encouraged and should be consistent in design and color throughout the site so as to read as a collection or set. Signs should be lit via external sources. Signs that are Internally illuminated, neon, flashing, or utilized LED strips are discouraged.



Use building elements for illumination as opposed to self-illuminating signs.



Appropriate use of wall sign and blade sign for the same tenant.



## DISCOURAGED



DESIGN FEATURES



# PARKING

Surface parking for commercial uses should be spread throughout the district so as to avoid creating overly large, consolidated paved areas of parking. Parking areas should include the use of street trees in landscaped islands (one tree between every 10 perpendicular parking spaces, min.). Residential parking should be located to the rear of residential buildings, ideally in integrated rear garages accessed via rear alleys. Clearly striped pedestrian cross walks and/or raised speed tables are encouraged.

## PREFERRED



1  
Landscape islands between parking spaces is strongly encouraged



3  
Appropriate example of a stormwater planter with tree (with or without fencing)



2  
Well-marked pedestrian crosswalks are required



4  
Provide landscaping and bulb-outs in parking areas to enhance pedestrian safety and experience



5  
Encourage rear-access garages and alley parking in residential areas



6  
Example of a well-planted larger parking lot

## DISCOURAGED



7  
Parking lots without landscaping are not permitted. Landscape islands are required



8  
Avoid tree wells when possible. Use stormwater planters (4)



9  
In residential areas, avoid forward facing garages and parking



# STORMWATER MANAGEMENT

Responsible and sustainable stormwater management strategies are critical to the success of this development. New development must result in a net decrease in impervious area, reduced runoff and erosion, and improved water quality. A wide variety of Stormwater Best Management Practices (BMPs) are strongly encouraged including (among others): utilizing a whole-site strategy rather than site-by-site approaches, incorporating distributed bioretention areas/rain gardens, downspout disconnects and rainwater harvesting, and pervious pavers/pavement where feasible.



## IMPERVIOUS SURFACE COVERAGE

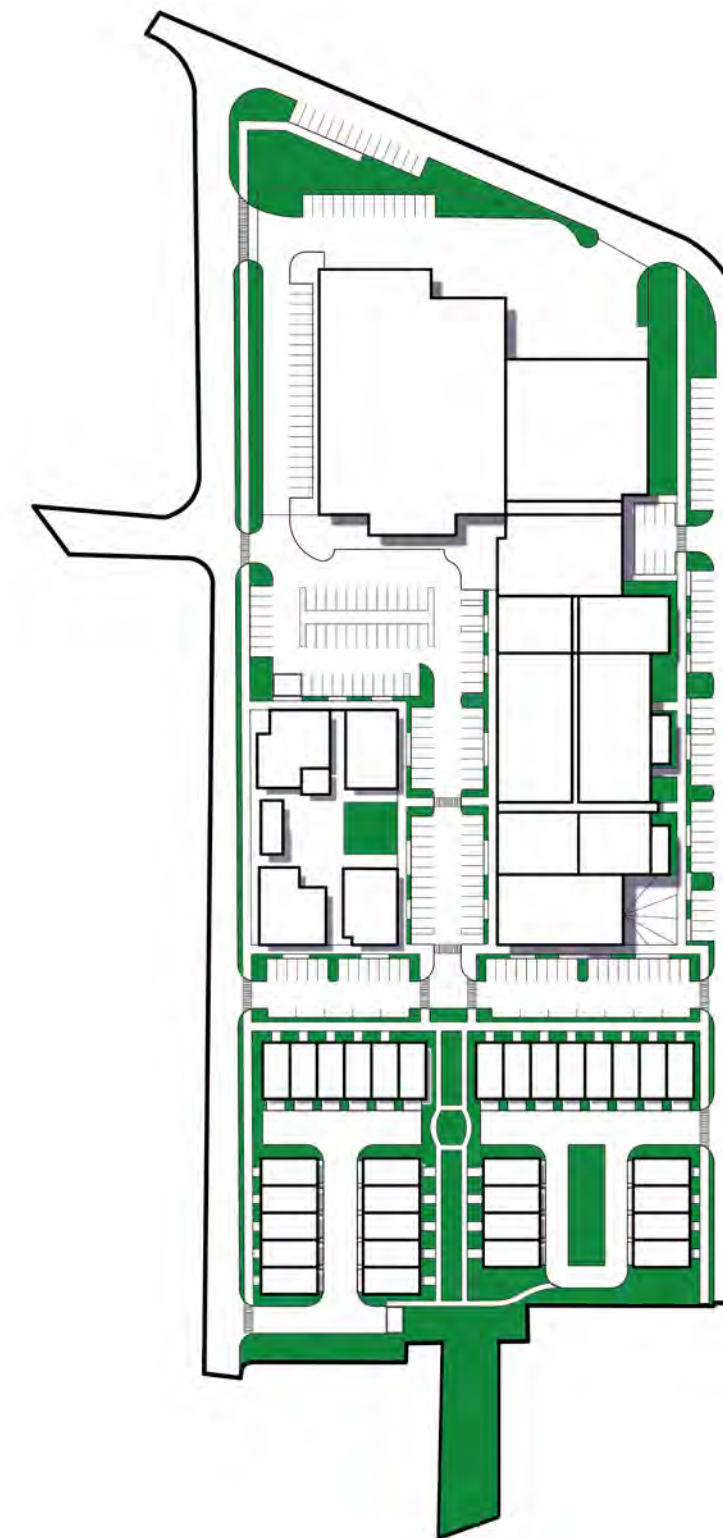
Existing Site Impervious

Surface Area = +/-9.5 ACRES

Proposed Site Impervious

Surface Area = +/-8.7 ACRES

Increase in 0.8 acres of pervious area



Potential Stormwater Management Locations







October 8, 2021

**VIA EMAIL/REGULAR MAIL**  
**AND HAND DELIVERY**

Mayor John Howard  
and City Council  
215 N. Broad St.  
Monroe, GA 30655

**Re: Appeal of Denial of Certificate of Appropriateness Demolition Request for 1238 S. Madison Ave.**

Dear Mayor Howard and City Council Members:

Please accept this as my formal request to appeal the October 7, 2021, denial pertaining to the above-referenced matter. Therefore, please place this matter on your next available hearing calendar so that I may present my appeal at that time.

If you have any questions or concerns, or if you need additional information, please do not hesitate to contact me at (678) 334-0207 or (678) 934-3041.

Thank you for your assistance.

Sincerely,

A handwritten signature in blue ink, appearing to be "Lawrence E. Parker", written over a horizontal line.

Lawrence E. Parker





**To:** Mayor and Council

**From:** Les Russell, Director of Human Resources

**Department:** City Wide

**Date:** 10/05/2021 for Finance & HR Committee

**Description:** 1<sup>st</sup> Reading – GMEBS Restated Defined Benefit Retirement and Plan Ordinance

**Budget Account/Project Name:** Georgia Municipal Employees Benefit System (GMEBS)

**Funding Source:** 2022 operating budgets: city-wide

**Budget Allocation:** \$45,000 100-3500-512400-Fire  
 \$58,170 100-3200-5124000-Police

**Budget Available:** To Be Determined

**Requested Expense:** \$103,170

**Estimate of:** Employer

**Company of Purchase:** GMEBS

**Recommendation:**

Staff recommends that the City Council APPROVE the GMEBS ordinance to amend and restate the public safety service and vesting requirements and the change to prior service credit buy-back.

**Background:**

The City of Monroe has provided a great benefit for all employees with the pension plan available through GMEBS. The plan as written today provides retirement benefits after 55 years of age and 25 years of service. The challenge in today’s environment is that while this continues to provide a solid benefit, the added stress of public safety positions has made this goal hard to reach. To encourage length of service and as an enhancement for recruiting public safety personnel, the city should adopt an ordinance that allows public safety personnel the ability to earn retirement benefits with 20 years of service and eligibility at age 50.

The new benefit will take effect for all public safety personnel on January 1, 2022 but will not have a financial impact of the cost or valuation until 2023. At that time the increase in cost to the city, since this is an employer paid benefit, will be an estimated \$103,170.00 annually.

An additional change to the plan that is being requested is providing an expanded opportunity to purchase credit for service performed prior to employment with the City of Monroe. This change will enhance this benefit as a recruiting and retention tool.

Currently any employee who has served in the military or in another government agency is allowed to purchase credit equal to that prior service. This is allowed after the 5-year vesting plateau with the city and must be complete within 5 years of that date. The request is to remove this time barrier and allow service credit purchase to be at anytime after vesting in the plan, during the open enrollment period in November of each year.

This is not an additional expense to the city as the employee pays for the study and is responsible for the cost of the service credit purchase. It only facilitates the ability to execute the process when it is financially feasible for the employee.





**AN ORDINANCE TO AMEND THE GEORGIA MUNICIPAL EMPLOYEES BENEFIT SYSTEM PLAN REGARDING THE RETIREMENT PLAN FOR THE EMPLOYEES OF THE CITY OF MONROE**

**THE MAYOR AND COUNCIL OF THE CITY OF MONROE HEREBY ORDAIN AS FOLLOWS:**

This is an Ordinance to amend and restate the Retirement Plan for the Employees of the City of Monroe, Georgia in accordance with and subject to the terms and conditions set forth in the attached Adoption Agreement, any Addendum to the Adoption Agreement, the Georgia Municipal Employees Benefit System (GMEBS) Master Plan Document, and the GMEBS Trust Agreement. When accepted by the authorized officers of the City and GMEBS, the foregoing shall constitute a Contract between the City and GMEBS, all as authorized and provided by O.C.G.A. § 47-5-1 et seq.

**BE IT ORDAINED** by the Mayor and Council of the City of Monroe, Georgia, and it is hereby ordained by the authority thereof:

**Section 1.** The Retirement Plan for the Employees of the City of Monroe, Georgia is hereby amended and restated as set forth in and subject to the terms and conditions stated in the following Adoption Agreement, any Addendum to the Adoption Agreement, the Georgia Municipal Employees Benefit System (GMEBS) Master Plan Document, and the GMEBS Trust Agreement.

**SEE EXHIBIT "A"** Attached hereto and incorporated herein by reference for the complete Adoption Agreement, any Addendum to the Adoption Agreement, the Georgia Municipal Employees Benefit System (GMEBS) Master Plan Document, and the GMEBS Trust Agreement.

**Section 2.** Except as otherwise specifically required by law or by the terms of the Master Plan or Adoption Agreement (or any Addendum), the rights and obligations under the Plan with respect to persons whose employment with the City was terminated or who vacated his office with the City for any reason whatsoever prior to the effective date of this Ordinance are fixed and shall be governed by such Plan, if any, as it existed and was in effect at the time of such termination.

**Section 3.** The effective date of this Ordinance shall be January 1, 2022.

**Section 4.** All Ordinances and parts of ordinances in conflict herewith are expressly repealed.

**FIRST READING.** This 12<sup>th</sup> day of October 2021.

**SECOND READING AND ADOPTED** on this 9<sup>th</sup> day of November 2021.

**CITY OF MONROE, GEORGIA**

(SEAL)

By: \_\_\_\_\_  
John S. Howard, Mayor

Attest: \_\_\_\_\_  
Debbie Kirk, City Clerk

**GEORGIA MUNICIPAL EMPLOYEES**  
**BENEFIT SYSTEM**

**DEFINED BENEFIT RETIREMENT PLAN**

**AN ORDINANCE**  
**and**  
**ADOPTION AGREEMENT**  
**for**

**City of Monroe**

**Form Volume Submitter Adoption Agreement**  
**Amended and Restated as of January 1, 2013**  
**(With Amendments Taking Effect on or Before January 1, 2017)**



**TABLE OF CONTENTS**

	<b><u>PAGE</u></b>
I. AN ORDINANCE .....	1
II. GMEBS DEFINED BENEFIT RETIREMENT PLAN	
ADOPTION AGREEMENT .....	2
1. ADMINISTRATOR .....	2
2. ADOPTING EMPLOYER.....	2
3. GOVERNING AUTHORITY .....	2
4. PLAN REPRESENTATIVE.....	2
5. PENSION COMMITTEE.....	3
6. TYPE OF ADOPTION .....	3
7. EFFECTIVE DATE.....	4
8. PLAN YEAR .....	5
9. CLASSES OF ELIGIBLE EMPLOYEES.....	5
A. Eligible Regular Employees .....	5
B. Elected or Appointed Members of the Governing Authority .....	5
10. ELIGIBILITY CONDITIONS.....	6
A. Hours Per Week (Regular Employees).....	6
B. Months Per Year (Regular Employees).....	7
11. WAITING PERIOD.....	7
12. ESTABLISHING PARTICIPATION IN THE PLAN .....	7
13. CREDITED SERVICE .....	8
A. Credited Past Service with Adopting Employer .....	8
B. Prior Military Service .....	9
C. Prior Governmental Service.....	11
D. Leave Conversion for Unused Paid Time Off (e.g., Sick, Vacation, or Personal Leave).....	13
14. RETIREMENT ELIGIBILITY.....	14
A. Early Retirement Qualifications .....	14
B. Normal Retirement Qualifications.....	15
C. Alternative Normal Retirement Qualifications.....	17
D. Disability Benefit Qualifications .....	21
15. RETIREMENT BENEFIT COMPUTATION.....	21
A. Maximum Total Credited Service.....	21
B. Monthly Normal Retirement Benefit Amount.....	22
C. Monthly Early Retirement Benefit Amount .....	24
D. Monthly Late Retirement Benefit Amount (check one): .....	25
E. Monthly Disability Benefit Amount.....	25
F. Minimum/Maximum Benefit For Elected Officials .....	26
16. SUSPENSION OF BENEFITS FOLLOWING BONA FIDE SEPARATION OF SERVICE; COLA.....	27

- A. Re-Employment as Eligible Employee After Normal, Alternative Normal, or Early Retirement and Following Bona Fide Separation of Service (see Master Plan Section 6.06(c) Regarding Re-Employment as an Ineligible Employee and Master Plan Section 6.06(e) and (f) Regarding Re-Employment After Disability Retirement) .....27
- B. Cost Of Living Adjustment.....28
- 17. TERMINATION OF EMPLOYMENT BEFORE RETIREMENT; VESTING .....29
  - A. Eligible Regular Employees .....29
  - B. Elected or Appointed Members of the Governing Authority .....29
- 18. PRE-RETIREMENT DEATH BENEFITS .....30
  - A. In-Service Death Benefit.....30
  - B. Terminated Vested Death Benefit.....31
- 19. EMPLOYEE CONTRIBUTIONS .....32
- 20. MODIFICATION OF THE TERMS OF THE ADOPTION AGREEMENT .....33
- 21. TERMINATION OF THE ADOPTION AGREEMENT .....34
- 22. EMPLOYER ADOPTION AND AUTHORIZATION FOR AMENDMENTS .....34



## **I. AN ORDINANCE**

An Ordinance to amend and restate the Retirement Plan for the Employees of the City of Monroe, Georgia in accordance with and subject to the terms and conditions set forth in the attached Adoption Agreement, any Addendum to the Adoption Agreement, the Georgia Municipal Employees Benefit System (GMEBS) Master Plan Document, and the GMEBS Trust Agreement. When accepted by the authorized officers of the City and GMEBS, the foregoing shall constitute a Contract between the City and GMEBS, all as authorized and provided by O.C.G.A. § 47-5-1 et seq.

BE IT ORDAINED by the Mayor and Council of the City of Monroe, Georgia, and it is hereby ordained by the authority thereof:

**Section 1.** The Retirement Plan for the Employees of the City of Monroe, Georgia is hereby amended and restated as set forth in and subject to the terms and conditions stated in the following Adoption Agreement, any Addendum to the Adoption Agreement, the Georgia Municipal Employees Benefit System (GMEBS) Master Plan Document, and the GMEBS Trust Agreement.

**Ordinance continued on page 37**

**II. GMEBS DEFINED BENEFIT RETIREMENT PLAN  
ADOPTION AGREEMENT**

**1. ADMINISTRATOR**

Georgia Municipal Employees Benefit System  
201 Pryor Street, SW  
Atlanta, Georgia 30303  
Telephone: 404-688-0472  
Facsimile: 404-577-6663

**2. ADOPTING EMPLOYER**

Name: **City of Monroe, Georgia**

**3. GOVERNING AUTHORITY**

Name: **Mayor and Council of the City of Monroe**  
Address: **P.O. Box 1249, Monroe, GA 30655-1249**  
Phone: **(770) 267-7536**  
Facsimile: **(770) 267-2319**

**4. PLAN REPRESENTATIVE**

**[To represent Governing Authority in all communications with GMEBS and Employees]  
(See Section 2.49 of Master Plan)**

Name: **City Administrator**  
Address: **P.O. Box 1249, Monroe, GA 30655-1249**  
Phone: **(770) 267-7536**  
Facsimile: **(770) 267-2319**



### 5. PENSION COMMITTEE

[Please designate members by position. If not, members of Pension Committee shall be determined in accordance with Article XIV of Master Plan]

- Position: **Mayor**
- Position: **City Finance Committee Chairman**
- Position: **City Administrator**
- Position: **City Finance Director**
- Position: **City HR/Payroll Supervisor**

Pension Committee Secretary: **City Administrator**  
 Address: **P.O. Box 1249, Monroe, GA 30655-1249**  
 Phone: **(770) 267-7536**  
 Facsimile: **(770) 267-2319**

### 6. TYPE OF ADOPTION

This Adoption Agreement is for the following purpose (**check one**):

- This is a new defined benefit plan adopted by the Adopting Employer for its Employees. This plan does not replace or restate an existing defined benefit plan.
- This is an amendment and restatement of the Adopting Employer's preexisting non-GMEBS defined benefit plan.
- This is an amendment and restatement of the Adoption Agreement previously adopted by the Employer, as follows (**check one or more as applicable**):
  - To update the Plan to comply with PPA, HEART, WRERA, and other applicable federal laws and guidance.
  - To make the following amendments to the Adoption Agreement (**must specify below revisions made in this Adoption Agreement; all provisions must be completed in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i): This is an amendment to establish an Alternative Normal Retirement qualification for Public Safety Employees who are at least age 50 and have at least 20 years of Total Credited Service (see Adoption Agreement, p. 20). This is also an amendment to eliminate the requirement that Participants wishing to purchase Credited Service under the Plan apply for said purchase within five (5) years of becoming Vested and establishes an annual two-month window of November 1 – December 31 for service credit purchase applications, provided that Participants purchasing less than all eligible service credit must purchase service credit in whole-year increments (see Service Credit Purchase Addendum, Paragraphs 4 and 8).**

### 7. EFFECTIVE DATE

NOTE: This Adoption Agreement and any Addendum, with the accompanying Master Plan Document, is designed to comply with Internal Revenue Code Section 401(a), as applicable to a governmental qualified defined benefit plan, and is part of the GMEBS Defined Benefit Retirement Plan. Plan provisions designed to comply with certain provisions of the Pension Protection Act of 2006 ("PPA"); the Heroes Earnings Assistance and Relief Tax Act of 2008 ("HEART"); and the Worker, Retiree, and Employer Recovery Act of 2008 ("WRERA"); and Plan provisions designed to comply with certain provisions of additional changes in federal law and guidance from the Internal Revenue Service under Internal Revenue Service Notice 2012-76 (the 2012 Cumulative List) are effective as of the applicable effective dates set forth in the Adoption Agreement and Master Plan Document. By adopting this Adoption Agreement, with its accompanying Master Plan Document, the Adopting Employer is adopting a plan document intended to comply with Internal Revenue Code Section 401(a), as updated by PPA, HEART, WRERA, and the 2012 Cumulative List with the applicable effective dates.

- (1) Complete this item (1) only if this is a new defined benefit plan which does not replace or restate an existing defined benefit plan.

The effective date of this Plan is \_\_\_\_\_.  
(insert effective date of this Adoption Agreement not earlier than January 1, 2013).

- (2) Complete this item (2) only if this Plan is being adopted to replace a non-GMEBS defined benefit plan.

Except as otherwise specifically provided in the Master Document or in this Adoption Agreement, the effective date of this restatement shall be the \_\_\_\_\_ (insert effective date of this Adoption Agreement not earlier than January 1, 2013). This Plan is intended to replace and serve as an amendment and restatement of the Employer's preexisting plan, which became effective on \_\_\_\_\_ (insert original effective date of preexisting plan).

- (3) Complete this item (3) only if this is an amendment and complete restatement of the Adopting Employer's existing GMEBS defined benefit plan.

Except as otherwise specifically provided in the Master Document or in this Adoption Agreement, the effective date of this restatement shall be January 1, 2022 (insert effective date of this Adoption Agreement not earlier than January 1, 2013).

This Plan is adopted as an amendment and restatement of the Employer's preexisting GMEBS Adoption Agreement, which became effective on January 14, 2020 (insert effective date of most recent Adoption Agreement preceding this Adoption Agreement).

The Employer's first Adoption Agreement became effective September 1, 2003 (insert effective date of Employer's first GMEBS Adoption Agreement). The Employer's GMEBS Plan was originally effective August 1, 1973 (insert effective date of Employer's original GMEBS Plan). (If the Employer's Plan was originally a non-GMEBS Plan, then the Employer's non-GMEBS Plan was originally effective \_\_\_\_\_ (if applicable, insert effective date of Employer's original non-GMEBS Plan).)



### 8. PLAN YEAR

Plan Year means (check one):

- Calendar Year
- Employer Fiscal Year commencing \_\_\_\_\_.
- Other (must specify month and day commencing): August 1.

### 9. CLASSES OF ELIGIBLE EMPLOYEES

Only Employees of the Adopting Employer who meet the Master Plan's definition of "Employee" may be covered under the Adoption Agreement. Eligible Employees shall not include non-governmental employees, independent contractors, leased employees, nonresident aliens, or any other ineligible individuals, and this Section 9 must not be completed in a manner that violates the "exclusive benefit rule" of Internal Revenue Code Section 401(a)(2).

#### A. Eligible Regular Employees

Regular Employees include Employees, other than elected or appointed members of the Governing Authority or Municipal Legal Officers, who are regularly employed in the services of the Adopting Employer. Subject to the other conditions of the Master Plan and the Adoption Agreement, the following Regular Employees are eligible to participate in the Plan (check one):

- ALL** - All Regular Employees, provided they satisfy the minimum hour and other requirements specified under "Eligibility Conditions" below.
- ALL REGULAR EMPLOYEES EXCEPT** for the following employees (must specify; specific positions are permissible; specific individuals may not be named):  
\_\_\_\_\_.

#### B. Elected or Appointed Members of the Governing Authority

An Adopting Employer may elect to permit participation in the Plan by elected or appointed members of the Governing Authority and/or Municipal Legal Officers, provided they otherwise meet the Master Plan's definition of "Employee" and provided they satisfy any other requirements specified by the Adopting Employer. Municipal Legal Officers to be covered must be specifically identified by position. Subject to the above conditions, the Employer hereby elects the following treatment for elected and appointed officials:

##### (1) Elected or Appointed Members of the Governing Authority (check one):

- ARE NOT** eligible to participate in the Plan.
- ARE** eligible to participate in the Plan.

Please specify any limitations on eligibility to participate here (e.g., service on or after certain date, or special waiting period provision): Each elected or appointed member of the Governing Authority who holds office on November 1, 2004 shall be qualified to participate in the Plan on such date. Each other elected or appointed member of the Governing Authority who holds

**office after November 1, 2004 shall be qualified to participate in the Plan on the first day of the month immediately following or coinciding with the first date after November 1, 2004 that he or she occupies any elective office of the Governing Authority. (Participation became mandatory effective September 1, 2003. See Section 12 of this Adoption Agreement concerning mandatory participation in the Plan.) In accordance with Section 4.03(b) of the Master Plan, an elected or appointed member of the Governing Authority who initially takes office or returns to office on or after January 1, 2015, shall be qualified to participate in the Plan on the date he or she initially takes such office or returns to office.**

**(2) Municipal Legal Officers (check one):**

- ARE NOT** eligible to participate in the Plan.
- ARE** eligible to participate in the Plan. The term "Municipal Legal Officer" shall include only the following positions **(must specify - specific positions are permissible; specific individuals may not be named):** \_\_\_\_\_.

Please specify any limitations on eligibility to participate here (e.g., service on or after certain date) **(must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)):** \_\_\_\_\_.

**10. ELIGIBILITY CONDITIONS**

**A. Hours Per Week (Regular Employees)**

The Adopting Employer may specify a minimum number of work hours per week which are required to be scheduled by Regular Employees in order for them to become and remain "Eligible Regular Employees" under the Plan. **It is the responsibility of the Adopting Employer to determine whether these requirements are and continue to be satisfied.** The Employer hereby elects the following minimum hour requirement for Regular Employees:

- No minimum
- 20 hours/week (regularly scheduled)
- 30 hours/week (regularly scheduled)
- Other: \_\_\_\_\_ (must not exceed 40 hours/week regularly scheduled)

**Exceptions:** If a different minimum hour requirement applies to a particular class or classes of Regular Employees, please specify below the classes to whom the different requirement applies and indicate the minimum hour requirement applicable to them.

Class(es) of Regular Employees to whom exception applies **(must specify - specific positions are permissible; specific individuals may not be named):** \_\_\_\_\_.

Minimum hour requirement applicable to excepted Regular Employees:

- No minimum
- 20 hours/week (regularly scheduled)
- 30 hours/week (regularly scheduled)



- Other: \_\_\_\_\_ (must not exceed 40 hours/week regularly scheduled)

**B. Months Per Year (Regular Employees)**

The Adopting Employer may specify a minimum number of work months per year which are required to be scheduled by Regular Employees in order for them to become and remain "Eligible Employees" under the Plan. **It is the responsibility of the Adopting Employer to determine whether these requirements are and continue to be satisfied.** The Employer hereby elects the following minimum requirement for Regular Employees:

- No minimum
- At least **6** months per year (regularly scheduled)

**Exceptions:** If different months per year requirements apply to a particular class or classes of Regular Employees, the Employer must specify below the classes to whom the different requirements apply and indicate below the requirements applicable to them.

Regular Employees to whom exception applies (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

The months to year requirement for excepted class(es) are:

- No minimum
- At least \_\_\_\_\_ months per year (regularly scheduled)

**11. WAITING PERIOD**

Except as otherwise provided in Section 4.02(b) of the Master Plan, Eligible Regular Employees shall not have a waiting period before participating in the Plan. Likewise, elected or appointed members of the Governing Authority and Municipal Legal Officers, if eligible to participate in the Plan, shall not have a waiting period before participating in the Plan.

**12. ESTABLISHING PARTICIPATION IN THE PLAN**

Participation in the Plan is considered mandatory for all Eligible Employees who satisfy the eligibility conditions specified in the Adoption Agreement, except as provided in Section 4.03(e) of the Master Plan. However, the Employer may specify below that participation is optional for certain classes of Eligible Employees, including Regular Employees, elected or appointed members of the Governing Authority, Municipal Legal Officers, City Managers, and/or Department Heads. If participation is optional for an Eligible Employee, then in order to become a Participant, he must make a written election to participate within 120 days after employment, election or appointment to office, or if later, the date he first becomes eligible to participate in the Plan. The election is irrevocable, and the failure to make the election within the 120 day time limit shall be deemed an irrevocable election not to participate in the Plan.

Classes for whom participation is optional (**check one**):

- None (Participation is mandatory for all Eligible Employees except as provided in Section 4.03(e) of the Master Plan).

- Participation is optional for the following Eligible Employees (**must specify - specific positions are permissible; specific individuals may not be named; all positions or classes specified must be Eligible Employees**): \_\_\_\_\_.

### 13. CREDITED SERVICE

In addition to Current Credited Service the Adopting Employer may include as Credited Service the following types of service:

**A. Credited Past Service with Adopting Employer**

Credited Past Service means the number of years and complete months of Service with the Adopting Employer prior to the date an Eligible Employee becomes a Participant which are treated as credited service under the Plan.

**(1) Eligible Employees Employed on Original Effective Date of GMEBS Plan.** With respect to Eligible Employees who are employed by the Adopting Employer on the original Effective Date of the Employer's GMEBS Plan, Service with the Adopting Employer prior to the date the Eligible Employee becomes a Participant (including any Service prior to the Effective Date of the Plan) shall be treated as follows (**check one**):

- All Service prior to the date the Eligible Employee becomes a Participant shall be credited (as Credited Past Service).
- All Service prior to the date the Eligible Employee becomes a Participant shall be credited (as Credited Past Service), except for Service rendered prior to \_\_\_\_\_ (**insert date**).
- All Service prior to the date the Eligible Employee becomes a Participant shall be credited (as Credited Past Service), except as follows (**must specify other limitation in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.
- No Service prior to the date the Eligible Employee becomes a Participant shall be credited (as Credited Past Service).

**(2) Previously Employed, Returning to Service after Original Effective Date.** If an Eligible Employee is not employed on the original Effective Date of the Employer's GMEBS Plan, but he returns to Service with the Adopting Employer sometime after the Effective Date, his Service prior to the date he becomes a Participant (including any Service prior the Effective Date) shall be treated as follows (**check one**):

- All Service prior to the date the Eligible Employee becomes a Participant shall be credited (as Credited Past Service), subject to any limitations imposed above with respect to Eligible Employees employed on the Effective Date.
- All Service prior to the date the Eligible Employee becomes a Participant shall be credited (as Credited Past Service), provided that after his return to employment,



the Eligible Employee performs Service equal to the period of the break in Service or one (1) year, whichever is less. Any limitations imposed above with respect to Eligible Employees employed on the Effective Date shall also apply.

- No Service prior to the date the Eligible Employee becomes a Participant shall be credited (as Credited Past Service).

Other limitation(s) on Recognition of Credited Past Service (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i): In addition to the above limitations, and notwithstanding any other provision to the contrary, Credited Past Service shall not include any tenure of office as an elected or appointed member of the Governing Authority prior to November 1, 2004, unless the Participant was serving as an elected or appointed member of the Governing Authority or Eligible Regular Employee on November 1, 2004.**

**(3) Eligible Employees Initially Employed After Effective Date.** If an Eligible Employee's initial employment date is after the original Effective Date of the Employer's GMEBS Plan, his Credited Past Service shall include only the number of years and complete months of Service from his initial employment date to the date he becomes a Participant in the Plan.

**(4) Newly Eligible Classes of Employees.** If a previously ineligible class of Employees becomes eligible to participate in the Plan, the Employer must specify in an addendum to this Adoption Agreement whether and to what extent said Employees' prior service with the Employer shall be treated as Credited Past Service under the Plan.

**B. Prior Military Service**

**Note: This Section does not concern military service required to be credited under USERRA – See Section 3.02 of the Master Plan for rules on the crediting of USERRA Military Service.**

**(1) Credit for Prior Military Service.**

The Adopting Employer may elect to treat military service rendered prior to a Participant's initial employment date or reemployment date as Credited Service under the Plan. Unless otherwise specified by the Employer under "Other Conditions" below, the term "Military Service" shall be as defined in the Master Plan. Except as otherwise required by federal or state law or under "Other Conditions" below, Military Service shall not include service which is credited under any other local, state, or federal retirement or pension plan.

Military Service credited under this Section shall not include any service which is otherwise required to be credited under the Plan by federal or state law. Prior Military Service shall be treated as follows (**check one**):

- Prior Military Service is **not** creditable under the Plan (**if checked, skip to Section 13.C. – Prior Governmental Service**).
- Prior Military Service shall be counted as Credited Service for the following purposes (check one or more as applicable):

- Computing amount of benefits payable.
- Meeting minimum service requirements for vesting.
- Meeting minimum service requirements for benefit eligibility.

**(2) Maximum Credit for Prior Military Service.**

Credit for Prior Military Service shall be limited to a maximum of \_\_\_\_\_ years **(insert number)**.

**(3) Rate of Accrual for Prior Military Service.**

Credit for Prior Military Service shall accrue at the following rate **(check one)**:

- One month of military service credit for every \_\_\_\_\_ month(s) **(insert number)** of Credited Service with the Adopting Employer.
- One year of military service credit for every \_\_\_\_\_ year(s) **(insert number)** of Credited Service with the Adopting Employer.
- All military service shall be creditable (subject to any caps imposed above) after the Participant has completed \_\_\_\_\_ years **(insert number)** of Credited Service with the Employer.
- Other requirement **(must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i))**: **Military Service shall be creditable upon full payment by the Participant for such service, subject to the conditions listed below.**

**(4) Payment for Prior Military Service Credit (check one):**

- Participants shall **not** be required to pay for military service credit.
- Participants shall be required to pay for military service credit as follows:
  - The Participant must pay **100%** of the actuarial cost of the service credit (as defined below).
  - The Participant must pay an amount equal to **(must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i))**: \_\_\_\_\_.

**Other Conditions for Award of Prior Military Service Credit (must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i))**: **For purposes of this provision, the definition of “Military Service” contained in Section 2.42 of the Master Plan shall control, except that the second sentence of said definition shall not apply. In order to receive Military Service credit hereunder, the Participant must submit to the Pension Committee Secretary a copy of the Participant’s DD-214 (military separation**



**papers), reflecting the Participant’s prior Military Service. See Service Credit Purchase Addendum for additional conditions.**

**(5) Limitations on Service Credit Purchases.** Unless otherwise specified in an Addendum to the Adoption Agreement, for purposes of this Section and Section 13.C. concerning prior governmental service credit, the term "actuarial cost of service credit" is defined as set forth in the Service Credit Purchase Addendum. In the case of a service credit purchase, the Participant shall be required to comply with any rules and regulations established by the GMEBS Board of Trustees concerning said purchases.

**C. Prior Governmental Service**

**Note:** A Participant's prior service with other GMEBS employers shall be credited for purposes of satisfying the minimum service requirements for Vesting and eligibility for Retirement and pre-retirement death benefits as provided under Section 9.05 of the Master Plan, relating to portability service. This Section 13(C) does not need to be completed in order for Participants to receive this portability service credit pursuant to Section 9.05 of the Master Plan.

**(1) Credit for Prior Governmental Service.**

The Adopting Employer may elect to treat governmental service rendered prior to a Participant's initial employment date or reemployment date as creditable service under the Plan. Subject to any limitations imposed by law, the term "prior governmental service" shall be as defined by the Adopting Employer below. The Employer elects to treat prior governmental service as follows **(check one)**:

- Prior governmental service is **not** creditable under the Plan **(if checked, skip to Section 13.D. – Unused Sick/Vacation Leave).**
- Prior governmental service shall be counted as Credited Service for the following purposes under the Plan **(check one or more as applicable)**:
  - Computing amount of benefits payable.
  - Meeting minimum service requirements for vesting.
  - Meeting minimum service requirements for benefit eligibility.

**(2) Definition of Prior Governmental Service.**

Prior governmental service shall be defined as follows: **(must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i): Prior Service performed as a full-time employee (employed at least 30 hours per week) of a municipal corporation (other than the City of Monroe), county, consolidated city-county government, the State of Georgia or any other state, or the federal government. However, service creditable under this provision shall not include military service or service for any school system, school district, or school board. If there is a question about whether a Participant’s prior service is within the above definition of prior governmental service, the City Attorney**

**shall have sole discretionary authority to determine whether such service is within said definition, and such determination shall be final and binding.**

**Part-time service (less than 30 hours per week) performed as an employee of the City of Monroe prior to the date that the Participant became a Participant in this Plan shall also be creditable as prior governmental service hereunder. For purposes of this provision, each year of part-time service shall count as one half-year of credited service, and each month of part-time service shall count as one half-month of credited service. Partial months shall not be creditable.**

Unless otherwise specified above, prior governmental service shall include only full-time service (minimum hour requirement same as that applicable to Eligible Regular Employees).

**(3) Maximum Credit for Prior Governmental Service.**

Credit for prior governmental service shall be limited to a maximum of \_\_\_\_\_ years (insert number).

**(4) Rate of Accrual for Prior Governmental Service Credit.**

Credit for prior governmental service shall accrue at the following rate (check one):

- One month of prior governmental service credit for every \_\_\_\_\_ month(s) (insert number) of Credited Service with the Adopting Employer.
- One year of prior governmental service credit for every \_\_\_\_\_ year(s) (insert number) of Credited Service with the Adopting Employer.
- All prior governmental service shall be creditable (subject to any caps imposed above) after the Participant has completed \_\_\_\_\_ years (insert number) of Credited Service with the Adopting Employer.
- Other requirement (must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)): **Prior governmental service shall be creditable upon full payment by the Participant for such service, subject to the conditions listed in the Service Credit Purchase Addendum.**

**(5) Payment for Prior Governmental Service Credit.**

- Participants shall not be required to pay for governmental service credit.
- Participants shall be required to pay for governmental service credit as follows:
  - The Participant must pay **100%** of the actuarial cost of the service credit.
  - The Participant must pay an amount equal to (must specify in a manner that satisfies the definite written program requirement of Treasury



**Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i): \_\_\_\_\_.**

Other Conditions for Award of Prior Governmental Service Credit (must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i): \_\_\_\_.

**D. Leave Conversion for Unused Paid Time Off (e.g., Sick, Vacation, or Personal Leave)**

**(1) Credit for Unused Paid Time Off.**

Subject to the limitations in Section 3.01 of the Master Plan, an Adopting Employer may elect to treat accumulated days of unused paid time off for a terminated Participant, for which the Participant is not paid, as Credited Service. The only type of leave permitted to be credited under this provision is leave from a paid time off plan which qualifies as a bona fide sick and vacation leave plan (which may include sick, vacation or personal leave) and which the Participant may take as paid leave without regard to whether the leave is due to illness or incapacity. The Credited Service resulting from the conversion of unused paid time off must not be the only Credited Service applied toward the accrual of a normal retirement benefit under the Plan. The Pension Committee shall be responsible to certify to GMEBS the total amount of unused paid time off that is creditable hereunder.

**Important Note:** Leave cannot be converted to Credited Service in lieu of receiving a cash payment. If the Employer elects treating unused paid time off as Credited Service, the conversion to Credited Service will be automatic, and the Participant cannot request a cash payment for the unused paid time off.

The Employer elects the following treatment of unused paid time off:

- Unused paid time off shall **not** be treated as Credited Service (if checked, skip to **Section 14 – Retirement Eligibility**).
- The following types of unused paid time off for which the Participant is not paid shall be treated as Credited Service under the Plan (check one or more as applicable):
  - Unused sick leave
  - Unused vacation leave
  - Unused personal leave
  - Other paid time off (must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i): \_\_\_\_\_).

**(2) Minimum Service Requirement.**

In order to receive credit for unused paid time off, a Participant must meet the following requirement at termination (check one):

- The Participant must be 100% vested in a normal retirement benefit.
- The Participant must have at least \_\_\_\_\_ years (**insert number**) of Total Credited Service (not including leave otherwise creditable under this Section).
- Other (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

**(3) Use of Unused Paid Time Off Credit.** Unused paid time off for which the Participant is not paid shall count as Credited Service for the following purposes under the Plan (**check one or more as applicable**):

- Computing amount of benefits payable.
- Meeting minimum service requirements for vesting.
- Meeting minimum service requirements for benefit eligibility.

**(4) Maximum Credit for Unused Paid Time Off.**

Credit for unused paid time off for which the Participant is not paid shall be limited to a maximum of \_\_\_\_ months (**insert number**).

**(5) Computation of Unused Paid Time Off.**

Unless otherwise specified by the Adopting Employer under "Other Conditions" below, each twenty (20) days of creditable unused paid time off shall constitute one (1) complete month of Credited Service under the Plan. Partial months shall not be credited.

**(6) Other Conditions (please specify, subject to limitations in Section 3.01 of Master Plan; must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)):** \_\_\_\_\_.

## 14. RETIREMENT ELIGIBILITY

### A. Early Retirement Qualifications

Early retirement qualifications are (**check one or more as applicable**):

- Attainment of age 55 (**insert number**)
- Completion of 10 years (**insert number**) of Total Credited Service

**Exceptions:** If different early retirement eligibility requirements apply to a particular class or classes of Eligible Employees, the Employer must specify below the classes to whom the different requirements apply and indicate below the requirements applicable to them.

Eligible Employees to whom exception applies (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

Early retirement qualifications for excepted class(es) are (**check one or more as applicable**):



- Attainment of age \_\_\_\_\_ (insert number)
- Completion of \_\_\_\_\_ years (insert number) of Total Credited Service

**B. Normal Retirement Qualifications**

**Note:** Please complete this Section and also list "Alternative" Normal Retirement Qualifications, if any, in Section 14.C.

**(1) Regular Employees**

Normal retirement qualifications for Regular Employees are (check one or more as applicable):

- Attainment of age **65** (insert number)
- Completion of **5** years (insert number) of Total Credited Service
- In-Service Distribution to Eligible Employees permitted (i.e., a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if Participant meets minimum age and service requirements specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to (check one):  all Participants  only the following class(es) of Participants (must specify - specific positions are permissible; specific individuals may not be named): \_\_\_\_\_.

**Exceptions:** If different normal retirement qualifications apply to a particular class or classes of Regular Employees, the Employer must specify below the classes to whom the different requirements apply and indicate below the requirements applicable to them.

Class(es) of Regular Employees to whom exception applies (must specify - specific positions are permissible; specific individuals may not be named): \_\_\_\_\_.

Normal retirement qualifications for excepted class(es) are (check one or more as applicable):

- Attainment of age \_\_\_\_\_ (insert number)
- Completion of \_\_\_\_\_ years (insert number) of Total Credited Service
- In-Service Distribution to Eligible Employees permitted (i.e., a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if Participant meets minimum age and service requirements specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to (check one):  all Participants  only the following class(es)

of Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

**(2) Elected or Appointed Members of Governing Authority**

**Complete this Section only if elected or appointed members of the Governing Authority or Municipal Legal Officers are permitted to participate in the Plan.** Normal retirement qualifications for this class are **(check one or more as applicable)**:

- Attainment of age **65 (insert number)**
- Completion of \_\_\_\_\_ years **(insert number)** of Total Credited Service
- In-Service Distribution to Eligible Employees permitted (*i.e.*, a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if Participant meets minimum age and service requirements specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to **(check one)**:  all Participants  only the following class(es) of Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

**Exceptions:** If different normal retirement qualifications apply to particular elected or appointed members of the Governing Authority or Municipal Legal Officers, the Employer must specify below to whom the different requirements apply and indicate below the requirements applicable to them.

Particular elected or appointed members of the Governing Authority or Municipal Legal Officers to whom exception applies **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

Normal retirement qualifications for excepted elected or appointed members of the Governing Authority or Municipal Legal Officers are **(check one or more as applicable)**:

- Attainment of age \_\_\_\_\_ **(insert number)**
- Completion of \_\_\_\_\_ years **(insert number)** of Total Credited Service
- In-Service Distribution to Eligible Employees permitted (*i.e.*, a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if Participant meets minimum age and service requirements specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to **(check one)**:  all Participants  only the following class(es)



of Participants (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

**C. Alternative Normal Retirement Qualifications**

The Employer may elect to permit Participants to retire with unreduced benefits after they satisfy service and/or age requirements other than the regular normal retirement qualifications specified above. The Employer hereby adopts the following alternative normal retirement qualifications:

**Alternative Normal Retirement Qualifications (check one or more, as applicable):**

- (1)  Not applicable (the Adopting Employer does not offer alternative normal retirement benefits under the Plan).
- (2)  **Alternative Minimum Age & Service Qualifications (if checked, please complete one or more items below, as applicable):**
  - Attainment of age **55 (insert number)**
  - Completion of **25 (insert number)** of Total Credited Service
  - In-Service Distribution to Eligible Employees permitted (i.e., a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if Participant meets minimum age and service requirements specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to (**check one**):  all Participants  only the following class(es) of Participants (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

This alternative normal retirement benefit is available to:

- All Participants who qualify.
- Only the following Participants (**must specify - specific positions are permissible; specific individuals may not be named**): **Eligible Regular Employees.**

A Participant (**check one**):  is required  is not required to be in the service of the Employer at the time he satisfies the above qualifications in order to qualify for this alternative normal retirement benefit.

Other eligibility requirement (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

(3)  **Rule of \_\_\_\_\_ (insert number).** The Participant's combined Total Credited Service and age must equal or exceed this number. Please complete additional items below:

To qualify for this alternative normal retirement benefit, the Participant (**check one or more items below, as applicable**):

- Must have attained at least age \_\_\_\_\_ (**insert number**)
- Must not satisfy any minimum age requirement
- In-Service Distribution to Eligible Employees permitted (*i.e.*, a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if the Participant meets the minimum age and service requirements specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to (**check one**):  all Participants  only the following class(es) of Participants (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

This alternative normal retirement benefit is available to:

- All Participants who qualify.
- Only the following Participants (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

A Participant (**check one**):  is required  is not required to be in the service of the Employer at the time he satisfies the Rule in order to qualify for this alternative normal retirement benefit.

Other eligibility requirement (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

(4)  **Alternative Minimum Service.** A Participant is eligible for an alternative normal retirement benefit if he has at least \_\_\_\_\_ years (**insert number**) of Total Credited Service, regardless of the Participant's age.

- In-Service Distribution to Eligible Employees permitted (*i.e.*, a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if the Participant meets the minimum service requirement specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions

concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to **(check one)**:  all Participants  only the following class(es) of Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

This alternative normal retirement benefit is available to:

- All Participants who qualify.
- Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

A Participant **(check one)**:  is required  is not required to be in the service of the Employer at the time he satisfies the qualifications for this alternative normal retirement benefit.

Other eligibility requirement **(must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i))**: \_\_\_\_\_.

**(5)  Other Alternative Normal Retirement Benefit.**

**Must specify qualifications (in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i))**: \_\_\_\_\_.

- In-Service Distribution to Eligible Employees permitted (i.e., a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if the Participant meets minimum age and service requirements specified immediately above and is at least age 62 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to **(check one)**:  all Participants  only the following class(es) of Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

This alternative normal retirement benefit is available to:

- All Participants who qualify.
- Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.



A Participant (**check one**):  is required  is not required to be in the service of the Employer at the time he satisfies the qualifications for this alternative normal retirement benefit.

Other eligibility requirement (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**):

\_\_\_\_\_.

(6)  **Other Alternative Normal Retirement Benefit for Public Safety Employees Only.**

**Must specify qualifications (in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i): Attainment of age 50 and completion of 20 years of Total Credited Service.**

- In-Service Distribution to Eligible Employees who are Public Safety Employees permitted (i.e., a qualifying Participant may commence receiving retirement benefits while in service without first incurring a Bona Fide Separation from Service), if the Participant meets minimum age and service requirements specified immediately above and is at least age 50 (unless a lower safe-harbor age is permitted under applicable federal law), subject to applicable Plan provisions concerning recalculation and offset applied at re-retirement to account for the value of benefits received prior to re-retirement. This rule shall apply to (**check one**):  all Participants  only the following class(es) of Participants (**must specify - specific positions are permissible; specific individuals may not be named**):

\_\_\_\_\_.

This alternative normal retirement benefit is available to:

- All public safety employee Participants who qualify.
- Only the following public safety employee Participants (**must specify - specific positions are permissible; specific individuals may not be named**):

\_\_\_\_\_.

A public safety employee Participant (**check one**):  is required  is not required to be in the service of the Employer at the time he satisfies the qualifications for this alternative normal retirement benefit.

Other eligibility requirement (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**):

\_\_\_\_\_.

**Note:** "Public safety employees" are defined under the Internal Revenue Code for this purpose as employees of a State or political subdivision of a State who provide police

protection, firefighting services, or emergency medical services for any area within the jurisdiction of such State or political subdivision.

**D. Disability Benefit Qualifications**

Subject to the other terms and conditions of the Master Plan and except as otherwise provided in an Addendum to this Adoption Agreement, disability retirement qualifications are based upon Social Security Administration award criteria or as otherwise provided under Section 2.23 of the Master Plan. The Disability Retirement benefit shall commence as of the Participant's Disability Retirement Date under Section 2.24 of the Master Plan.

To qualify for a disability benefit, a Participant must have the following minimum number of years of Total Credited Service (**check one**):

- Not applicable (the Adopting Employer does not offer disability retirement benefits under the Plan).
- No minimum.
- \_\_\_\_\_ years (**insert number**) of Total Credited Service.

Other eligibility requirement (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

**15. RETIREMENT BENEFIT COMPUTATION**

**A. Maximum Total Credited Service**

The number of years of Total Credited Service which may be used to calculate a benefit is (**check one or all that apply**):

- not limited.
- limited to \_\_\_\_\_ years for all Participants.
- limited to \_\_\_\_\_ years for the following classes of Eligible Regular Employees:
  - All Eligible Regular Employees.
  - Only the following Eligible Regular Employees: \_\_\_\_\_.
- limited to \_\_\_\_\_ years as an elected or appointed member of the Governing Authority.
- limited to \_\_\_\_\_ years as a Municipal Legal Officer.
- Other (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

**B. Monthly Normal Retirement Benefit Amount**

**(1) Regular Employee Formula**

The monthly normal retirement benefit for Eligible Regular Employees shall be 1/12 of **(check and complete one or more as applicable)**:

- (a) **Flat Percentage Formula. 2.0% (insert percentage) of Final Average Earnings multiplied by years of Total Credited Service as an Eligible Regular Employee.**

This formula applies to:

- All Participants who are Regular Employees.
- Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named):** \_\_\_\_\_.

- (b) **Alternative Flat Percentage Formula. \_\_\_\_\_% (insert percentage) of Final Average Earnings multiplied by years of Total Credited Service as an Eligible Regular Employee. This formula applies to the following Participants (must specify - specific positions are permissible; specific individuals may not be named):** \_\_\_\_\_.

- (c) **Split Final Average Earnings Formula. \_\_\_\_\_ % (insert percentage) of Final Average Earnings up to the amount of Covered Compensation (see subsection (2) below for definition of Covered Compensation), plus \_\_\_\_\_% (insert percentage) of Final Average Earnings in excess of said Covered Compensation, multiplied by years of Total Credited Service as an Eligible Regular Employee.**

This formula applies to:

- All Participants who are Regular Employees.
- Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named):**\_\_\_\_\_.

- (d) **Alternative Split Final Average Earnings Formula. \_\_\_\_\_ % (insert percentage) of Final Average Earnings up to the amount of Covered Compensation (see subsection (2) below for definition of Covered Compensation), plus \_\_\_\_\_% (insert percentage) of Final Average Earnings in excess of said Covered Compensation, multiplied by years of Total Credited Service as an Eligible Regular Employee.**

This formula applies to:

- All Participants.
- Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named):** \_\_\_\_\_.



[Repeat above subsections as necessary for each applicable benefit formula and Participant class covered under the Plan.]

**(2) Covered Compensation (complete only if Split Formula(s) is checked above):**

Covered Compensation is defined as (check one or more as applicable):

- (a) **A.I.M.E. Covered Compensation** as defined in Section 2.18 of the Master Plan. This definition of Covered Compensation shall apply to **(check one)**:
  - All Participants who are Regular Employees.
  - Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.
  
- (b) **Dynamic Break Point** Covered Compensation as defined in Section 2.19 of the Master Plan. This definition of Covered Compensation shall apply to **(check one)**:
  - All Participants who are Regular Employees.
  - Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named)**:\_\_\_\_\_.
  
- (c) **Table Break Point** Covered Compensation as defined in Section 2.20 of the Master Plan. This definition of Covered Compensation shall apply to **(check one)**:
  - All Participants who are Regular Employees.
  - Only the following class(es) of Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.
  
- (d) **Covered Compensation** shall mean a Participant's annual Earnings that do not exceed \$\_\_\_\_\_ **(specify amount)**. This definition shall apply to **(check one)**:
  - All Participants who are Regular Employees.
  - Only the following Participants **(must specify - specific positions are permissible; specific individuals may not be named)**:\_\_\_\_\_.

**(3) Final Average Earnings**

Unless otherwise specified in an Addendum to the Adoption Agreement, Final Average Earnings is defined as the monthly average of Earnings paid to a Participant by the Adopting Employer for the **60 (insert number not to exceed 60)** consecutive months of Credited Service preceding the Participant's most recent Termination in which the Participant's Earnings were the highest, multiplied by 12. Note: GMEBS has prescribed forms for calculation of Final Average Earnings that must be used for this purpose.

This definition of Final Average Earnings applies to:

- All Participants who are Regular Employees.
- Only the following Participants (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

**[Repeat above subsection as necessary for each applicable definition and Participant class covered under the Plan.]**

**(4) Formula for Elected or Appointed Members of the Governing Authority**

The monthly normal retirement benefit for members of this class shall be as follows (**check one**):

- Not applicable (elected or appointed members of the Governing Authority or Municipal Legal Officers are not permitted to participate in the Plan).
- \$30.00 (insert dollar amount)** per month for each year of Total Credited Service as an elected or appointed member of the Governing Authority or Municipal Legal Officer or major fraction thereof (6 months and 1 day).

This formula applies to:

- All elected or appointed members of the Governing Authority or Municipal Legal Officers eligible to participate.
- Only the following elected or appointed members of the Governing Authority or Municipal Legal Officers eligible to participate (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

**[Repeat above subsection as necessary for each applicable formula for classes of elected or appointed members covered under the Plan.]**

**C. Monthly Early Retirement Benefit Amount**

**Check and complete one or more as applicable:**

- (1) **Standard Early Retirement Reduction Table.** The monthly Early Retirement benefit shall be computed in the same manner as the monthly Normal Retirement benefit, but the benefit shall be reduced on an Actuarially Equivalent basis in accordance with Section 12.01 of the Master Plan to account for early commencement of benefits. This provision shall apply to:
  - All Participants.
  - Only the following Participants (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.
- (2) **Alternative Early Retirement Reduction Table.** The monthly Early Retirement benefit shall be computed in the same manner as the monthly Normal Retirement benefit, but the benefit shall be reduced to account for early commencement of benefits based on the following table. This table shall apply to:

- All Participants.
- Only the following Participants (**must specify - specific positions are permissible; specific individuals may not be named**):\_\_\_\_\_.

**Alternative Early Retirement Reduction Table**

<b><u>Number of Years Before [Age (Insert Normal Retirement Age)] (check as applicable)</u></b>	<b><u>Percentage of Normal Retirement Benefit* (complete as applicable)</u></b>
<input type="checkbox"/> 0	1.000
<input type="checkbox"/> 1	0.____
<input type="checkbox"/> 2	0.____
<input type="checkbox"/> 3	0.____
<input type="checkbox"/> 4	0.____
<input type="checkbox"/> 5	0.____
<input type="checkbox"/> 6	0.____
<input type="checkbox"/> 7	0.____
<input type="checkbox"/> 8	0.____
<input type="checkbox"/> 9	0.____
<input type="checkbox"/> 10	0.____
<input type="checkbox"/> 11	0.____
<input type="checkbox"/> 12	0.____
<input type="checkbox"/> 13	0.____
<input type="checkbox"/> 14	0.____
<input type="checkbox"/> 15	0.____

\*Interpolate for whole months

**D. Monthly Late Retirement Benefit Amount (check one):**

- (1) The monthly Late Retirement benefit shall be computed in the same manner as the Normal Retirement Benefit, based upon the Participant's Accrued Benefit as of his Late Retirement Date.
- (2) The monthly Late Retirement benefit shall be the greater of: (1) the monthly retirement benefit accrued as of the Participant's Normal Retirement Date, actuarially increased in accordance with the actuarial table contained in Section 12.05 of the Master Plan; or (2) the monthly retirement benefit accrued as of the Participant's Late Retirement Date, without further actuarial adjustment under Section 12.06 of the Master Plan.

**E. Monthly Disability Benefit Amount**

The amount of the monthly Disability Benefit shall be computed in the same manner as the Normal Retirement benefit, based upon the Participant's Accrued Benefit as of his Disability Retirement Date.



**Minimum Disability Benefit.** The Adopting Employer may set a minimum Disability Benefit. The Employer elects the following minimum Disability benefit **(check one)**:

- Not applicable (the Adopting Employer does not offer disability retirement benefits under the Plan).
- No minimum is established.
- No less than **(check one)**:  20%  10%  \_\_\_\_% **(if other than 20% or 10% insert percentage amount)** of the Participant's average monthly Earnings for the 12 calendar month period (excluding any period of unpaid leave of absence) immediately preceding his Termination of Employment as a result of a Disability. (Unless otherwise specified in an Addendum to the Adoption Agreement, no minimum will apply to elected or appointed members of the Governing Authority or Municipal Legal Officers.)
- No less than **(check one)**:  66 2/3 %  \_\_\_\_\_% **(if other than 66 2/3%, insert percentage amount)** of the Participant's average monthly Earnings for the 12 calendar month period (excluding any period of unpaid leave of absence) immediately preceding his Termination of Employment as a result of a Disability, less any monthly benefits paid from federal Social Security benefits as a result of disability as reported by the Employer. (Unless otherwise specified in an Addendum to the Adoption Agreement, no minimum will apply to elected or appointed members of the Governing Authority or Municipal Legal Officers.)

**Note:** The Adopting Employer is responsible for reporting to GMEBS any amounts to be used in an offset.

**F. Minimum/Maximum Benefit For Elected Officials**

In addition to any other limitations imposed by federal or state law, the Employer may impose a cap on the monthly benefit amount that may be received by elected or appointed members of the Governing Authority. The Employer elects **(check one)**:

- Not applicable (elected or appointed members of the Governing Authority do not participate in the Plan).
- No minimum or maximum applies.
- Monthly benefit for Service as an elected or appointed member of the Governing Authority may not exceed 100% of the Participant's final salary as an elected or appointed member of the Governing Authority.
- Other minimum or maximum **(must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i))**:  
\_\_\_\_\_.

**16. SUSPENSION OF BENEFITS FOLLOWING BONA FIDE SEPARATION OF SERVICE; COLA**

**A. Re-Employment as Eligible Employee After Normal, Alternative Normal, or Early Retirement and Following Bona Fide Separation of Service (see Master Plan Section 6.06(c) Regarding Re-Employment as an Ineligible Employee and Master Plan Section 6.06(e) and (f) Regarding Re-Employment After Disability Retirement)**

**(1) Reemployment After Normal or Alternative Normal Retirement.** In the event that a Retired Participant 1) is reemployed with the Employer as an Eligible Employee (as defined in the Plan) after his Normal or Alternative Normal Retirement Date and after a Bona Fide Separation from Service, or 2) is reemployed with the Employer in an Ineligible Employee class, and subsequently again becomes an Eligible Employee (as defined in the Plan) due to the addition of such class to the Plan after his Normal or Alternative Normal Retirement Date, the following rule shall apply **(check one)**:

- (a) The Participant's benefit shall be suspended in accordance with Section 6.06(a)(1) of the Master Plan for as long as the Participant remains employed.
- (b) The Participant may continue to receive his retirement benefit in accordance with Section 6.06(b) of the Master Plan. This rule shall apply to **(check one)**:  all Retired Participants  only the following classes of Retired Participants **(must specify (specific positions are permissible; specific individuals may not be named) - benefits of those Retired Participants not listed shall be suspended in accordance with Section 6.06(a) of the Master Plan if they return to work with the Employer):** \_\_\_\_\_.

**(2) Reemployment After Early Retirement.** In the event a Participant Retires with an Early Retirement benefit after a Bona Fide Separation from Service 1) is reemployed with the Employer as an Eligible Employee before his Normal Retirement Date; or 2) is reemployed with the Employer in an Ineligible Employee class, and subsequently again becomes an Eligible Employee (as defined in the Plan) before his Normal Retirement Date due to the addition of such class to the Plan, the following rule shall apply **(check one or more as applicable)**:

- (a)  The Participant's Early Retirement benefit shall be suspended in accordance with Section 6.06(a)(1) of the Master Plan for as long as the Participant remains employed.

This rule shall apply to **(check one)**:  all Retired Participants;  only the following classes of Retired Participants **(must specify - specific positions are permissible; specific individuals may not be named)**:  
\_\_\_\_\_.

- (b)  The Participant's Early Retirement benefit shall be suspended in accordance with Section 6.06(a)(1) of the Master Plan. However, the

Participant may begin receiving benefits after he satisfies the qualifications for Normal Retirement or Alternative Normal Retirement, as applicable, and after satisfying the minimum age parameters of Section 6.06(a)(3) of the Master Plan, in accordance with Section 6.06(b)(2)(B)(i) of the Master Plan.

This rule shall apply to **(check one)**:  all Retired Participants;  only the following classes of Retired Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

- (c)  The Participant's Early Retirement benefit shall continue in accordance with Section 6.06(b)(2)(B)(ii) of the Master Plan.

This rule shall apply to **(check one)**:  all Retired Participants;  only the following classes of Retired Participants **(must specify - specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

**B. Cost Of Living Adjustment**

The Employer may elect to provide for an annual cost-of-living adjustment (COLA) in the amount of benefits being received by Retired Participants and Beneficiaries, which shall be calculated and paid in accordance with the terms of the Master Plan. The Employer hereby elects the following **(check one)**:

- (1) No cost-of-living adjustment.
- (2) Variable Annual cost-of-living adjustment not to exceed \_\_\_\_\_% **(insert percentage)**.
- (3) Fixed annual cost-of-living adjustment equal to \_\_\_\_\_% **(insert percentage)**.

The above cost-of-living adjustment shall apply with respect to the following Participants (and their Beneficiaries) **(check one)**:

- All Participants (and their Beneficiaries).
- Participants (and their Beneficiaries) who terminate employment on or after \_\_\_\_\_ **(insert date)**.
- Other **(must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)); specific positions are permissible; specific individuals may not be named)**: \_\_\_\_\_.

The Adjustment Date for the above cost-of-living adjustment shall be (if not specified, the Adjustment Date shall be January 1): \_\_\_\_\_.



# 17. TERMINATION OF EMPLOYMENT BEFORE RETIREMENT; VESTING

## A. Eligible Regular Employees

Subject to the terms and conditions of the Master Plan, a Participant who is an Eligible Regular Employee and whose employment is terminated for any reason other than death or retirement shall earn a vested right in his accrued retirement benefit in accordance with the following schedule (check one):

- No vesting schedule (immediate vesting).
- Cliff Vesting Schedule.** Benefits shall be 100% vested after the Participant has a minimum of 5 years (insert number not to exceed 10) of Total Credited Service. Benefits remain 0% vested until the Participant satisfies this minimum.
- Graduated Vesting Schedule.** Benefits shall become vested in accordance with the following schedule (insert percentages):

<u>COMPLETED YEARS OF TOTAL CREDITED SERVICE</u>	<u>VESTED PERCENTAGE</u>
1	%
2	%
3	%
4	%
5	%
6	%
7	%
8	%
9	%
10	%

**Exceptions:** If a vesting schedule other than that specified above applies to a special class(es) of Regular Employees, the Employer must specify the different vesting schedule below and the class(es) to whom the different vesting schedule applies.

Regular Employees to whom exception applies (must specify - specific positions are permissible; specific individuals may not be named): \_\_\_\_\_.

Vesting Schedule for excepted class (must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)): \_\_\_\_\_.

## B. Elected or Appointed Members of the Governing Authority

Subject to the terms and conditions of the Master Plan, a Participant who is an elected or appointed member of the Governing Authority or a Municipal Legal Officer shall earn a vested right in his accrued retirement benefit for Credited Service in such capacity in accordance with the following schedule (check one):

- Not applicable (elected or appointed members of the Governing Authority are not permitted to participate in the Plan).
- No vesting schedule (immediate vesting).
- Other vesting schedule (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

## 18. PRE-RETIREMENT DEATH BENEFITS

### A. In-Service Death Benefit

Subject to the terms and conditions of the Master Plan, the Employer hereby elects the following in-service death benefit, to be payable in the event that an eligible Participant's employment with the Employer is terminated by reason of the Participant's death prior to Retirement (**check and complete one**):

- (1)  **Auto A Death Benefit.** A monthly benefit payable to the Participant's Pre-Retirement Beneficiary, equal to the decreased monthly retirement benefit that would have otherwise been payable to the Participant, had he elected a 100% joint and survivor benefit under Section 7.03 of the Master Plan. In order to be eligible for this benefit, a Participant must meet the following requirements (**check one**):
  - The Participant must be vested in a normal retirement benefit.
  - The Participant must have \_\_\_\_\_ years (**insert number**) of Total Credited Service.
  - The Participant must be eligible for Early or Normal Retirement.
  - Other eligibility requirement (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.
- (2)  **Actuarial Reserve Death Benefit.** A monthly benefit payable to the Participant's Pre-Retirement Beneficiary, actuarially equivalent to the reserve required for the Participant's anticipated Normal Retirement benefit, provided the Participant meets the following eligibility conditions (**check one**):
  - The Participant shall be eligible upon satisfying the eligibility requirements of Section 8.02(c) of the Master Plan.
  - The Participant must have \_\_\_\_\_ years (**insert number**) of Total Credited Service.

- Other eligibility requirement (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

**Imputed Service.** For purposes of computing the actuarial reserve death benefit, the Participant's Total Credited Service shall include (**check one**):

- Total Credited Service accrued prior to the date of the Participant's death.
- Total Credited Service accrued prior to the date of the Participant's death, plus (**check one**):  one-half (1/2)  \_\_\_\_\_ (**insert other fraction**) of the Service between such date of death and what would otherwise have been the Participant's Normal Retirement Date. (**See Master Plan Section 8.02(b) regarding 10-year cap on additional Credited Service.**)

Minimum In-Service Death Benefit for Vested Employees Equal to Terminated Vested Death Benefit. Unless otherwise specified under "Exceptions" below, if a Participant's employment is terminated by reason of the Participant's death prior to Retirement, and if as of the date of death the Participant is vested but he does not qualify for the in-service death benefit, then the Auto A Death Benefit will be payable, provided the Auto A Death Benefit is made available to terminated vested employees under the Adoption Agreement (see "Terminated Vested Death Benefit" below).

**(3) Exceptions:** If an in-service death benefit other than that specified above applies to one or more classes of Participants, the Employer must specify below the death benefit payable, the class(es) to whom the different death benefit applies, and the eligibility conditions for said death benefit.

Alternative Death Benefit (**must specify formula that satisfies the definite written program and definitely determinable requirements of Treasury Regulations Sections 1.401-1(a)(2) and 1.401-1(b)(1)(i) and does not violate limits applicable to governmental plans under Code Sections 401(a)(17) and 415**): \_\_\_\_\_.

Participants to whom alternative death benefit applies (**must specify - specific positions are permissible; specific individuals may not be named**): \_\_\_\_\_.

Eligibility conditions for alternative death benefit (**must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)**): \_\_\_\_\_.

**B. Terminated Vested Death Benefit**

**(1) Complete this Section only if the Employer offers a terminated vested death benefit.** The Employer may elect to provide a terminated vested death benefit, to be payable in the event that a Participant who is vested dies after termination of employment but before Retirement benefits commence. Subject to the terms and conditions of the Master Plan, the Employer hereby elects the following terminated vested death benefit (**check one**):



- Auto A Death Benefit.** A monthly benefit payable to the Participant's Pre-Retirement Beneficiary, equal to the decreased monthly retirement benefit that would have otherwise been payable to the Participant had he elected a 100% joint and survivor benefit under Section 7.03 of the Master Plan.
- Accrued Retirement Benefit.** A monthly benefit payable to the Participant's Pre-Retirement Beneficiary which shall be actuarially equivalent to the Participant's Accrued Normal Retirement Benefit determined as of the date of death.

(2) **Exceptions:** If a terminated vested death benefit other than that specified above applies to one or more classes of Participants, the Employer must specify below the death benefit payable, the class(es) to whom the different death benefit applies, and the eligibility conditions for said death benefit.

Alternative Death Benefit (must specify formula that satisfies the definite written program and definitely determinable requirements of Treasury Regulations Sections 1.401-1(a)(2) and 1.401-1(b)(1)(i) and does not violate limits applicable to governmental plans under Code Sections 401(a)(17) and 415): \_\_\_\_\_.

Participants to whom alternative death benefit applies (must specify - specific positions are permissible; specific individuals may not be named): \_\_\_\_\_.

Eligibility conditions for alternative death benefit (must specify in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)): \_\_\_\_\_.

## 19. EMPLOYEE CONTRIBUTIONS

(1) **Employee contributions (check one):**

- Are not required.
- Are required in the amount of \_\_\_\_\_ % (insert percentage) of Earnings for all Participants.
- Are required in the amount of \_\_\_\_\_ % (insert percentage) of Earnings for Participants in the following classes (must specify - specific positions are permissible; specific individuals may not be named): \_\_\_\_\_.

**[Repeat above subsection as necessary if more than one contribution rate applies.]**

(2) **Pre-Tax Treatment of Employee Contributions.** If Employee Contributions are required in Subsection (1) above, an Adopting Employer may elect to "pick up" Employee Contributions to the Plan in accordance with IRC Section 414(h). In such case, Employee Contributions shall be made on a pre-tax rather than a post-tax basis, provided the requirements of IRC Section 414(h) are met. If the Employer elects to pick up Employee Contributions, it is the

Employer's responsibility to ensure that Employee Contributions are paid and reported in accordance with IRC Section 414(h). The Adopting Employer must not report picked up contributions as wages subject to federal income tax withholding.

The Employer hereby elects **(check one)**:

- To pick up Employee Contributions. By electing to pick up Employee Contributions, the Adopting Employer specifies that the contributions, although designated as Employee Contributions, are being paid by the Employer in lieu of Employee Contributions. The Adopting Employer confirms that the executor of this Adoption Agreement is duly authorized to take this action as required to pick up contributions. This pick-up of contributions applies prospectively, and it is evidenced by this contemporaneous written document. On and after the date of the pick-up of contributions, a Participant does not have a cash or deferred election right (within the meaning of Treasury Regulation Section 1.401(k)-1(a)(3)) with respect to the designated Employee Contributions, which includes not having the option of receiving the amounts directly instead of having them paid to the Plan.
- Not to pick up Employee Contributions.

**(3) Interest on Employee Contributions.** The Adopting Employer may elect to pay interest on any refund of Employee Contributions.

- Interest shall not be paid.
- Interest shall be paid on a refund of Employee Contributions at a rate established by GMEBS from time to time.
- Other rate of interest **(must specify rate in a manner that satisfies the definite written program requirement of Treasury Regulation 1.401-1(a)(2) and the definitely determinable requirement of Treasury Regulation 1.401-1(b)(1)(i)):**  
\_\_\_\_\_.

## **20. MODIFICATION OF THE TERMS OF THE ADOPTION AGREEMENT**

If an Adopting Employer desires to amend any of its elections contained in this Adoption Agreement (or any Addendum), the Governing Authority by official action must adopt an amendment of the Adoption Agreement (or any Addendum) or a new Adoption Agreement (or Addendum) must be adopted and forwarded to the Board for approval. The amendment of the new Adoption Agreement (or Addendum) is not effective until approved by the Board and other procedures required by the Plan have been implemented.

The Administrator will timely inform the Adopting Employer of any amendments made by the Board to the Plan.

## 21. TERMINATION OF THE ADOPTION AGREEMENT

This Adoption Agreement (and any Addendum) may be terminated only in accordance with the Plan. The Administrator will inform the Adopting Employer in the event the Board should decide to discontinue this volume submitter program.

## 22. EMPLOYER ADOPTION AND AUTHORIZATION FOR AMENDMENTS

**Adoption.** The Adopting Employer hereby adopts the terms of the Adoption Agreement and any Addendum, which is attached hereto and made a part of this ordinance. The Adoption Agreement (and, if applicable, the Addendum) sets forth the Employees to be covered by the Plan, the benefits to be provided by the Adopting Employer under the Plan, and any conditions imposed by the Adopting Employer with respect to, but not inconsistent with, the Plan. The Adopting Employer reserves the right to amend its elections under the Adoption Agreement and any Addendum, so long as the amendment is not inconsistent with the Plan or the Internal Revenue Code or other applicable law and is approved by the Board of Trustees of GMEBS. The Adopting Employer acknowledges that it may not be able to rely on the volume submitter advisory letter if it makes certain elections under the Adoption Agreement or the Addendum.

The Adopting Employer hereby agrees to abide by the Master Plan, Trust Agreement, and rules and regulations adopted by the Board of Trustees of GMEBS, as each may be amended from time to time, in all matters pertaining to the operation and administration of the Plan. It is intended that the Act creating the Board of Trustees of GMEBS, this Plan, and the rules and regulations of the Board are to be construed in harmony with each other. In the event of a conflict between the provisions of any of the foregoing, they shall govern in the following order:

- (1) The Act creating the Board of Trustees of The Georgia Municipal Employees' Benefit System, O.C.G.A. Section 47-5-1 *et seq.* (a copy of which is included in the Appendix to the Master Defined Benefit Plan Document) and any other applicable provisions of O.C.G.A. Title 47;
- (2) The Master Defined Benefit Plan Document and Trust Agreement;
- (3) This Ordinance and Adoption Agreement (and any Addendum); and
- (4) The rules and regulations of the Board.

In the event that any section, subsection, sentence, clause or phrase of this Plan shall be declared or adjudged invalid or unconstitutional, such adjudication shall in no manner affect the previously existing provisions or the other section or sections, subsections, sentences, clauses or phrases of this Plan, which shall remain in full force and effect, as if the section, subsection, sentence, clause or phrase so declared or adjudicated invalid or unconstitutional were not originally a part hereof. The Governing Authority hereby declares that it would have passed the remaining parts of this Plan or retained the previously existing provisions if it had known that such part or parts hereof would be declared or adjudicated invalid or unconstitutional.



This Adoption Agreement (and any Addendum) may only be used in conjunction with Georgia Municipal Employees Benefit System Master Defined Benefit Retirement Plan Document approved by the Internal Revenue Service under advisory letter J501718a dated March 30, 2018. The Adopting Employer understands that failure to properly complete this Adoption Agreement (or any Addendum), or to operate and maintain the Plan and Trust in accordance with the terms of the completed Adoption Agreement (and any Addendum), Master Plan Document and Trust, may result in disqualification of the Adopting Employer's Plan under the Internal Revenue Code. Inquiries regarding the adoption of the Plan, the meaning of Plan provisions, or the effect of the IRS advisory letter should be directed to the Administrator. The Administrator is Georgia Municipal Employees Benefit System, with its primary business offices located at: 201 Pryor Street, SW, Atlanta, Georgia, 30303. The business telephone number is: (404) 688-0472. The primary person to contact is: GMEBS Legal Counsel.

**Authorization for Amendments.** Effective on and after February 17, 2005, the Adopting Employer hereby authorizes the volume submitter practitioner who sponsors the Plan on behalf of GMEBS to prepare amendments to the Plan, for approval by the Board, on its behalf as provided under Revenue Procedure 2005-16, as superseded by Revenue Procedure 2015-36, Revenue Procedure 2011-49, and Announcement 2005-37. Effective January 1, 2013, Georgia Municipal Association, Inc., serves as the volume submitter practitioner for the Plan. Employer notice and signature requirements were met for the Adopting Employer before the effective date of February 17, 2005. The Adopting Employer understands that the implementing amendment reads as follows:

On and after February 17, 2005, the Board delegates to the Practitioner the authority to advise and prepare amendments to the Plan, for approval by the Board, on behalf of all Adopting Employers, including those Adopting Employers who have adopted the Plan prior to the January 1, 2013, restatement of the Plan, for changes in the Code, the regulations thereunder, revenue rulings, other statements published by Internal Revenue Service, including model, sample, or other required good faith amendments (but only if their adoption will not cause such Plan to be individually designed), and for corrections of prior approved plans. These amendments shall be applied to all Adopting Employers. Employer notice and signature requirements have been met for all Adopting Employers before the effective date of February 17, 2005. In any event, any amendment prepared by the Practitioner and approved by the Board will be provided by the Administrator to Adopting Employers.

Notwithstanding the foregoing paragraph, no amendment to the Plan shall be prepared on behalf of any Adopting Employer as of either:

- the date the Internal Revenue Service requires the Adopting Employer to file Form 5300 as an individually designed plan as a result of an amendment by the Adopting Employer to incorporate a type of Plan not allowable in a volume submitter plan as described in Revenue Procedure 2015-36; or
- as of the date the Plan is otherwise considered an individually designed plan due to the nature and extent of the amendments.

If the Adopting Employer is required to obtain a determination letter for any reason in order to maintain reliance on the advisory letter, the Practitioner's authority to amend the Plan on behalf of the Adopting Employer is conditioned on the Plan receiving a favorable determination letter.

The Adopting Employer further understands that, if it does not give its authorization hereunder or, in the alternative, adopt another pre-approved plan, its Plan will become an individually designed plan and will not be able to rely on the volume submitter advisory letter.

**AN ORDINANCE (continued from page 1)**

**Section 2.** Except as otherwise specifically required by law or by the terms of the Master Plan or Adoption Agreement (or any Addendum), the rights and obligations under the Plan with respect to persons whose employment with the City was terminated or who vacated his office with the City for any reason whatsoever prior to the effective date of this Ordinance are fixed and shall be governed by such Plan, if any, as it existed and was in effect at the time of such termination.

**Section 3.** The effective date of this Ordinance shall be January 1, 2022.

**Section 4.** All Ordinances and parts of ordinances in conflict herewith are expressly repealed.

Approved by the Mayor and Council of the City of Monroe, Georgia this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Attest:

CITY OF MONROE, GEORGIA

\_\_\_\_\_  
City Clerk

\_\_\_\_\_  
Mayor

(SEAL)

Approved:

\_\_\_\_\_  
City Attorney

The terms of the foregoing Adoption Agreement are approved by the Board of Trustees of Georgia Municipal Employees Benefit System.

IN WITNESS WHEREOF, the Board of Trustees of Georgia Municipal Employees Benefit System has caused its Seal and the signatures of its duly authorized officers to be affixed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Board of Trustees  
Georgia Municipal Employees  
Benefit System

(SEAL)

\_\_\_\_\_  
Secretary



**GENERAL ADDENDUM TO THE  
GEORGIA MUNICIPAL EMPLOYEES BENEFIT SYSTEM  
DEFINED BENEFIT RETIREMENT PLAN  
ADOPTION AGREEMENT**

**This is an Addendum to the Adoption Agreement completed by the City of Monroe, Georgia, as follows (complete one or more sections, as applicable):**

**\*\*\* Items (1) through (13) of General Addendum – Not Applicable \*\*\***

**(14) Frozen Plan Provisions (for amendment of Adoption Agreement only – see Section 9 of Adoption Agreement regarding Classes of Eligible Employees):**

(a) **Plan Freeze** - The Plan is "frozen" effective as of \_\_\_\_\_ (specify date). The Plan shall be subject to all provisions of the Adoption Agreement and Master Plan, except as otherwise provided herein, and the Employer shall continue to maintain the Plan's qualified status. The Plan shall be frozen, as follows (check as applicable):

(i) The Plan shall be frozen with respect to the following class(es) of Eligible Employees (one or more as applicable):  all Participants;  all Eligible Regular Employees;  Members of the Governing Authority;  Municipal Legal Officers;  other (must specify): \_\_\_\_\_.

(ii) Active Participants in the affected class(es) of Eligible Employees as of the freeze effective date shall be vested in their normal retirement benefits accrued as of the effective date of the freeze to the extent funded notwithstanding any provision of the Adoption Agreement to the contrary.

(iii) Employees who are (check all that apply):  employed by the Employer or in office as of \_\_\_\_\_ (specify date),  first employed on or after \_\_\_\_\_ (specify date),  first take office on or after \_\_\_\_\_ (specify date),  reemployed on or

after \_\_\_\_\_ (specify date),  return to office (following a vacation of office) on or after \_\_\_\_\_ (specify date), shall not be eligible to participate in the Plan on or after \_\_\_\_\_ (specify date).

(iv) With respect to Employees designated in paragraph (iii) above, earnings on or after \_\_\_\_\_ (specify date) shall not be taken into account for purposes of the Plan.

(v) The Employees designated in paragraph (iii) above shall not be credited with Service for the Employer on or after \_\_\_\_\_ (specify date) for purposes of (check all that apply):  computing the amount of benefits payable;  meeting minimum service requirements for participation and vesting;  meeting minimum service requirements for benefit eligibility under the Plan.

(vi) The following additional provisions shall apply as a result of the freeze (must specify): \_\_\_\_\_.

(b) **Restoration Following Plan Freeze** - The Plan has been "frozen" since December 1, 1997 (specify freeze date). Effective January 1, 2004 (specify date), the Plan shall be reactivated in accordance with and subject to the following provisions (check as applicable):

(i) The Plan shall cease to be frozen with respect to the following class(es) of Eligible Employees (one or more as applicable):  all Participants;  all Eligible Regular Employees;  Members of the Governing Authority;  Municipal Legal Officers;  other (must specify): \_\_\_\_\_.

(ii) Employees (check all that apply):  employed by the Employer and/or in office as of December 1, 1997 (specify date),  first employed on or after December 1, 1997 (specify date),  first took office on or after December 1, 1997 (specify date),  reemployed on or after January 1, 2004 (specify date),  returned to

office (following a vacation of office) on or after January 1, 2004 (specify date), shall be eligible to commence or re-commence participation in the Plan (as applicable) with respect to Service on or after December 1, 1997 (specify date), provided they otherwise meet the eligibility requirements for participation under the Plan.

- (iii) With respect to the Employees designated in paragraph (ii) above, Earnings on or after December 1, 1997 (specify date) shall be taken into account for purposes of the Plan.
  
- (iv) The Employees designated in paragraph (ii) above shall receive credit for Service for the Employer on or after December 1, 1997 (specify date) for purposes of (check all that apply):  computing the amount of benefits payable;  meeting minimum service requirements for participation and vesting;  meeting minimum service requirements for benefit eligibility under the Plan, provided the Employee met the minimum hour requirement and other eligibility requirements for recognition of Credited Service under the Plan.
  
- (v) Former Employees who are reemployed and/or return to office as Eligible Employees after January 1, 2004(specify date) will receive credit for Service with the Employer on or after December 1, 1997 (specify date) for purposes of (check all that apply):  computing the amount of benefits payable;  meeting minimum service requirements for participation and vesting;  meeting minimum service requirements for benefit eligibility under the Plan, provided the Employee meets the minimum hour requirement and other eligibility requirements for recognition of Credited Service with respect to said period under the Plan, and provided the Employee satisfies any applicable Plan requirements with respect to his break in Service.



- (vi) **The following additional provisions shall apply as a result of restoration following the freeze (must specify): With respect to a former Employee hired on or after December 1, 1997 who may become reemployed as an Eligible Employee after January 1, 2004, credit for any service performed between December 1, 1997 and January 1, 2004 will only be restored if such Employee completes at least one (1) year of Service upon his or her reemployment with the City.**

The terms of the foregoing Addendum to the Adoption Agreement are approved by the Mayor and Council of the City of Monroe, Georgia this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Attest: CITY OF MONROE, GEORGIA,

\_\_\_\_\_  
City Clerk

\_\_\_\_\_  
Mayor

(SEAL)

Approved:

\_\_\_\_\_  
City Attorney

The terms of the foregoing Addendum are approved by the Board of Trustees of the Georgia Municipal Employees Benefit System.

IN WITNESS WHEREOF, the Board of Trustees of the Georgia Municipal Employees Benefit System has caused its Seal and the signatures of its duly authorized officers to be affixed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

**Board of Trustees  
Georgia Municipal Employees  
Benefit System**

(SEAL)

\_\_\_\_\_  
Secretary

**SERVICE CREDIT PURCHASE  
ADDENDUM TO THE  
GEORGIA MUNICIPAL EMPLOYEES BENEFIT SYSTEM  
DEFINED BENEFIT RETIREMENT PLAN  
ADOPTION AGREEMENT**

**This is an Addendum to the Adoption Agreement completed by the City of Monroe, Georgia. It modifies the Adoption Agreement to provide for service credit purchases for eligible Participants in the Retirement Plan for the Employees of the City of Monroe, in accordance with and subject to the following requirements:**

- (1) Service Credit Purchase; Eligibility Requirements. Subject to any conditions specified in Section 13.B. or 13.C. of the Adoption Agreement and in this Service Credit Purchase Addendum, Participants in this Plan who are actively employed on or after January 1, 2004, and who are Vested in this Plan may purchase service credit under this Plan for prior Military Service, Prior Governmental Service, and part-time service, as described in subsections 13.B. and 13.C. of the Adoption Agreement. The Participant may not purchase credit for service other than that described in subsections 13.B. and 13.C. of the Adoption Agreement, nor may a Participant purchase credit for service which is already creditable under the Plan. The purchase of prior service credit is permitted but not required under this Plan. Such purchases will be allowed to the extent permitted by law, subject to any conditions, proofs, or acceptance that the Pension Committee Secretary or GMEBS deem appropriate.**
  
- (2) Use of Purchased Service Credit. Subject to any conditions or limitations provided in this Addendum, service credit purchased hereunder will be counted as Credited Service for purposes of (check all that apply):**

  - computing the amount of benefits payable under the Plan;**
  
  - meeting the minimum service requirements for vesting under the Plan;**
  
  - meeting the minimum service requirements for benefit eligibility under the Plan.**

- (3) **Application to Purchase Service Credit.** A Participant who meets the eligibility requirements specified in paragraph (1) above and who wishes to purchase eligible service credit as described in paragraph (1) above may apply for such purchase by completing and submitting to the Pension Committee Secretary an application form provided for that purpose. Participants will be responsible for providing the Pension Committee Secretary with any information or documentation that the Pension Committee Secretary deems necessary to establish that the Participant’s service is eligible for purchase under paragraph (1) above.
- (4) **Window Period for Application.** In order to purchase service credit, eligible Participants may submit the service credit purchase application within the two-month annual window beginning each November 1 and ending each December 31. If a Participant does not submit a completed application to purchase service credit within the designated window period, the Participant will not be permitted to purchase service credit. As a precondition for approval of his or her application, the Participant will be responsible for providing the Pension Committee Secretary with any additional information or documentation that the Pension Committee Secretary deems necessary to establish that the Participant's service is eligible for purchase under paragraph (1) above. Notwithstanding any provision herein to the contrary, no Participant may apply for or purchase prior service credit after his or her termination of employment.
- (5) **Review by Pension Committee Secretary.** Within a reasonable time after the end of the application period, the Pension Committee Secretary will review the Participant's application to purchase service credit and will determine whether the application should be accepted. Upon approval of an application by the Pension Committee Secretary, the Pension Committee Secretary will certify on the application the number of years and months of prior service that are eligible for purchase under paragraph (1) above.
- (6) **Fee for Cost Study.** As a precondition for approval of the application to purchase service credit, and prior to the commencement of any cost study, Participants may be required by the Employer to pay all or a portion of the GMEBS actuarial cost study fee(s) associated with determining the cost to purchase the Participant’s eligible service credit.



Any portion of the fee that the Participant is not required to pay will be paid by the Employer.

- (7) **Actuarial Study to Determine Cost of Purchase.** In the event that a cost study has not been undertaken prior to the Participant's submission of a completed application to purchase service credit, if the Participant's application to purchase is approved by the Pension Committee Secretary, a cost study will be undertaken as soon as reasonably practicable after the application has been approved, in order to determine the actuarial cost relating to the Participant's prior service that is eligible for purchase.
  
- (8) **Lump Sum Payment Required Within 90 Days.** Upon completion of the cost study, the Pension Committee Secretary will notify the Participant of the lump sum amount required to purchase prior service credit, as reflected in the cost study. Within 90 days of receiving this notice or of receiving notice of the Pension Committee's approval of the Participant's application to purchase service credit, whichever is later, the Participant shall remit said lump sum amount in the form and manner required by paragraphs (9)-(11) below, the Pension Committee Secretary, and GMEBS. The Participant may remit less than the full lump amount necessary to purchase all of the prior service credit which is eligible for purchase, in which case the percentage of service credit awarded will be equal to the percentage of the full amount remitted; provided, however, that if a Participant purchases less than the full amount of service credit that is eligible for purchase, the Participant must purchase such prior service credit in full-year (12 month) increments. The Pension Committee Secretary shall have the authority to extend the 90-day time period for payment of lump sum amounts required to purchase service credit if, for reasons outside the control of the Participant, payment cannot be made within the 90-day period. However, the time limit for payment will not be extended any later than 90 days and in no event may a Participant make such payment after his or her termination of employment.
  
- (9) **Method of Payment.** To the extent permitted by the Internal Revenue Code and regulations issued thereunder, the lump sum amount referred to in paragraph (8) above may be paid via one or more of the following sources: (1) a direct trustee-to-trustee transfer from a 401(a) qualified retirement plan, a governmental 457(b) deferred compensation plan or

a 403(b) tax sheltered annuity; (2) a qualified rollover from a governmental 457(b) plan, 403(b) tax-sheltered annuity plan, 401(a) qualified plan, 403(a) annuity plan, or a 408(a) or 408(b) individual retirement account or annuity (traditional IRA); or (3) a lump sum contribution of after-tax funds. Participants shall be solely responsible for effecting the payment referred to herein. Participants will not be permitted to purchase credit via payroll deduction.

(10) **Limitation on Amount of Lump Sum Payment.** If the lump sum amount referred to in paragraph (8) is paid via any method other than as described under paragraph (9)(1) or (9)(2) above, then the Participant shall not be permitted to contribute to the Plan in any calendar year an amount which exceeds any applicable limit specified in Internal Revenue Code Section 415.

(11) **IRC 415, Other Limitations.** Notwithstanding any other provision of the Adoption Agreement or this Addendum to the contrary, the Plan will not accept and shall return without interest any contribution or portion of a contribution made to purchase service credit if such contribution would result in a violation of the applicable limitations established under Internal Revenue Code Section 415(b), (c), or (n) or any other provision of law or the Plan, or if it is later determined that the Participant’s prior service is not eligible for purchase, and any prior service credit attributable to said contribution or portion of a contribution will be forfeited.

(12) **Return of Contributions.** Contributions made to purchase prior service credit shall be used to fund retirement and death benefits payable under the Plan relating to such credit. Contributions shall not otherwise be refundable to the Participant or any other person, except as otherwise provided in this paragraph (12) or in Section 13.06 or 18.04 of the Master Plan Document (concerning failure to exhaust or termination of the Plan, respectively). Participants (check one):

- will **not** be permitted to withdraw contributions made to purchase prior service credit upon termination of employment (Participants must be vested to purchase prior service credit).
- will **not** be permitted to withdraw contributions made to purchase prior service credit upon termination of employment, unless they

are not vested upon termination (Participants are not required to be vested to purchase prior service credit).

- will be permitted to withdraw contributions made to purchase service credit upon termination of employment, subject to the provisions of Section 13.03(c) of the Master Plan Document concerning the effect of withdrawal. For purposes of determining the amount of any refund of contributions made to purchase service credit, said contributions shall be credited with interest at [insert rate], subject to any limitations on the crediting of interest in Section 13.03(c) of the Master Plan Document.
- will be permitted to withdraw contributions made to purchase service credit upon termination of employment, subject to the following conditions for repayment (must describe):

\_\_\_\_\_

**Note:** Partial withdrawal of employee contributions is not permitted. If the Participant withdraws contributions made to purchase service credit, the Participant will forfeit any and all service credit and/or benefits attributable to such purchase for all purposes.

**(13) Repayment Upon Reemployment.** If the Participant returns to employment with the Employer after having withdrawn his contributions made to purchase prior service credit, the Participant (check one):

- not applicable (withdrawal not permitted).
- will not be permitted to re-purchase said service credit upon reemployment.
- will be permitted to re-purchase said service credit upon reemployment, based on the actuarial cost of such service credit, taking into account the additional actuarial cost of any benefit enhancements adopted prior to reemployment pursuant to paragraph (14) below, provided that the Participant makes application for such re-purchase within [insert time limit] after reemployment and provided the Participant effects payment for such re-purchase in accordance with and subject to the provisions of this



Addendum within [insert time limit] after the application is approved.

- will be permitted to re-purchase said service credit upon reemployment, subject to the following conditions for repayment (must describe other repayment method): \_\_\_\_\_.

(14) **Definition of Actuarial Cost.** The cost to purchase qualifying prior service credit shall be determined based upon the actuarial cost of said prior service credit. In applying the provisions of the Adoption Agreement and this Service Credit Purchase Addendum, the term "actuarial cost of prior service credit" means:

- the actuarial accrued liability relating to such prior service as determined by the GMEBS actuary and calculated using the actuarial assumptions and methods established for this purpose in the funding policy adopted by the GMEBS Board of Trustees.
- Other (must specify other method of determining actuarial cost for this purpose): \_\_\_\_\_.

The terms of the foregoing Service Credit Purchase Addendum to the Adoption Agreement are approved by the Mayor and Council of the City of Monroe, Georgia this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Attest:

CITY OF MONROE, GEORGIA

\_\_\_\_\_  
City Clerk

\_\_\_\_\_  
Mayor

(SEAL)

Approved:

\_\_\_\_\_  
City Attorney

The terms of the foregoing Service Credit Purchase Addendum are approved by the Board of Trustees of the Georgia Municipal Employees Benefit System.

IN WITNESS WHEREOF, the Board of Trustees of the Georgia Municipal Employees Benefit System has caused its Seal and the signatures of its duly authorized officers to be affixed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Board of Trustees  
Georgia Municipal Employees  
Benefit System

(SEAL)

\_\_\_\_\_  
Secretary



**To:** Planning and Zoning / City Council  
**From:** Patrick Kelley  
**Department:** Planning, Zoning, Code and Development  
**Date:** 10-11-2021  
**Description:** Zoning ordinance Text amendment #12

**Budget Account/Project Name:** NA

**Funding Source:** 2021 NA

**Budget Allocation:** NA

**Budget Available:** NA

**Requested Expense:** \$NA

**Company of Purchase:** NA

**Recommendation:** Staff recommendation is to approve as submitted

**Background:** This amendment adds the conditional use of Private Sewage Treatment Facilities to section 630.3 Table 6 and also modifies Section 650.4 Special site requirements by removing minimum area requirements for planned districts and reducing street frontage requirements in the LCI district.

**Attachment(s):** Ordinance and exhibit A





# City of Monroe

215 N. Broad Street  
Monroe, GA 30655  
(770) 207-4674

## ZONING TEXT AMENDMENT PERMIT

PERMIT #:	204	DESCRIPTION:	Zoning Text Amendment #12
JOB ADDRESS:	215 N BROAD ST	LOT #:	
PARCEL ID:		BLK #:	
SUBDIVISION:		ZONING:	
ISSUED TO:	CITY OF MONROE	CONTRACTOR:	CITY OF MONROE
ADDRESS:	P.O. BOX 1249	ADDRESS:	P.O. BOX 1249
CITY, STATE ZIP:	MONROE GA 30655	CITY, STATE ZIP:	MONROE GA 30655
PHONE:		PHONE:	
PROP. USE:		DATE ISSUED:	9/08/2021
VALUATION:	\$ 0.00	EXPIRATION:	3/07/2022
SQ FT:	0.00	PERMIT STATUS:	O
OCCP TYPE:		# OF BEDROOMS	
CNST TYPE:		# OF BATHROOMS	
INSPECTION REQUESTS:	770-207-4674 lwilson@monroega.gov	# OF OTHER ROOMS	

FEE CODE	DESCRIPTION	AMOUNT
	FEE TOTAL	
	PAYMENTS	\$ 0.00
	BALANCE	\$ 0.00

### NOTES:

Section 630.3 Table 6—Industrial Zoning District Land Use Regulations; Modifying Industrial Zoning District Land Use table to add under the principle use of Utility and area service provider facilities—private sewage treatment facilities; this use is to be added as a conditional use.

Section 650.4 Special Site Requirements—Modifying the Special Site Requirements for Planned Development Districts to remove the minimum area requirement for Planned Development Districts throughout the City and inside the Livable Cities Initiative (LCI) District and to reduce the minimum frontage requirement for Planned Development Districts located in the LCI District.

P&Z MTG 10/19/2021 5:30pm—Council MTG 11/9/2021 6:00pm @215 N. Broad St.

**NOTICE**

THIS PERMIT BECOMES NULL AND VOID IF WORK OR CONSTRUCTION AUTHORIZED IS NOT COMMENCED WITHIN 6 MONTHS, OR IF CONSTRUCTION OR WORK IS SUSPENDED OR ABANDONED FOR A PERIOD OF 6 MONTHS AT ANY TIME AFTER WORK IS STARTED.

I HEREBY CERTIFY THAT I HAVE READ AND EXAMINED THIS DOCUMENT AND KNOW THE SAME TO BE TRUE AND CORRECT. ALL PROVISIONS OF LAWS AND ORDINANCES GOVERNING THIS TYPE OF WORK WILL BE COMPLIED WITH WHETHER SPECIFIED HEREIN OR NOT. GRANTING OF A PERMIT DOES NOT PRESUME TO GIVE AUTHORITY TO VIOLATE OR CANCEL THE PROVISION OF ANY OTHER STATE OR LOCAL LAW REGULATING CONSTRUCTION OR THE PERFORMANCE OF CONSTRUCTION.

  
\_\_\_\_\_  
(APPROVED BY)

10/11/2021  
DATE

**AN ORDINANCE TO AMEND THE ZONING  
ORDINANCE OF THE CITY OF MONROE, GEORGIA**

**The Mayor and Council of the city of Monroe, Georgia, hereby ordain as follows:**

**The Zoning Ordinance of the City of Monroe, officially adopted June 10, 2014, and Effective July 1, 2014, as thereafter amended, is hereby amended by implementing text amendments and changes outlined and identified in particular detail on Exhibit A, which such exhibit is incorporated herein by reference.**

All ordinances or parts of ordinances in conflict herewith are hereby repealed.

These text amendments of the City of Monroe Zoning Ordinance shall take effect upon their adoption by the Mayor and Council.

**FIRST READING.** This 9<sup>th</sup>, day of November, 2021.

**SECOND READING AND ADOPTED** on this 14<sup>th</sup> day of December, 2021.

**CITY OF MONROE, GEORGIA**

**By: \_\_\_\_\_ (SEAL)  
John Howard, Mayor**

**Attest: \_\_\_\_\_ (SEAL)  
Debbie Kirk, City Clerk**

EXHIBIT A

City of Monroe Zoning Ordinance Text Amendment

Amendment # 12

1. Section 630.3 Table 6—Industrial Zoning District Land Use Regulations; Modifying Industrial Zoning District Land Use table to add under the principle use of Utility and area service provider facilities—private sewage treatment facilities; this use is to be added as a conditional use.
  
2. Section 650.4 Special Site Requirements—Modifying the Special Site Requirements for Planned Development Districts to remove the minimum area requirement for Planned Development Districts throughout the City and inside the Livable Cities Initiative (LCI) District and to reduce the minimum frontage requirement for Planned Development Districts located in the LCI District. Section 650.4 to be amended as follows:
  - a. 650.4 Special Site Requirements. The site proposed for Planned Development District classification must abut a public street for continuous distance of at least one-hundred (100) feet. The only exception to this frontage requirement shall be in the Livable Cities Initiative District. Because of the special and unique circumstances of both maximum density and unique mixture of land uses within the LCI District, proposals for Planned Development District classification in the LCI District must abut a public street for a distance of at least fifty (50) feet.



# Proposed Amendments to the Zoning Ordinance

October 19 – Planning Commission

November 9 – City Council 1<sup>st</sup> Reading

December 14 – City Council 2<sup>nd</sup> Reading

Amendment Key

**Blue** – Language to be added

**Red** – Language to be removed

**Green** – Amendment description

- **Section 630.3: Modify Industrial Zoning District Land Use Regulation table to add the land use of Private Sewage Treatment Facilities. Added land use will be permitted by Conditional Use Permit in the M-1 zoning district. The land use of Private Sewage Treatment Facilities is based upon NAICS 221320 – Sewage Treatment Facilities.**

**Section 630.3 Industrial Land Use Regulations (M-1):**

**Section 630.3 Table 6 - Industrial Zoning District Land Use Regulations**

[P]=permitted; [X]=prohibited; [C]=conditional use permit required

LAND USE CATEGORY	DISTRICT	REFERENCE
<b>Principal Use*(unless noted as an accessory use)</b>	<b>M-1</b>	<b>See Section or Note</b>
<b>Accessory building and uses</b>		
structures-general	P	See §1000.1
temporary buildings	P	See §1000.9
uses-general	P	See §1000.2
<b>Administrative and information service facilities</b>		
administrative offices/processing center	P	
call/telecommunications center	P	
data processing/programming facilities	P	
data processing/programming facilities with product production	P	
<b>AGRICULTURE:</b>		
<b>Greenhouse, nursery, and indoor food crop production</b>	<b>P</b>	<b>PROPOSED for 10/12/21 City Council</b>
<b>Amusements and Entertainment</b>		
adult entertainment establishment	P	Note (5)
archery range or firing range	P	See § 1031
game center	X	
miniature golf, outdoor	X	
play centers, skating rink, bowling alley	P	
theaters	X	
theaters, outdoor	X	
<b>Animal facilities and services</b>		
clinics and specialty services	C	
hospitals, lodging, and shelters	C	
<b>Building, construction and special trade facilities</b>		
contractor and developer offices	P	
contractor/developer offices with facilities	P	
contractor/developer office center	P	
landscape/irrigation service	P	
timber harvesting service	P	
tree surgery service	P	
building supply store, wholesale	P	



<b>RESIDENTIAL</b>	C		
<b>Sales and service facilities</b>			
appliance stores(small and large), retail, rental, and/or repairs	P	Note(4)	
building supply, retail	P		
equipment(small and large), service and rental	P		
equipment(office), service and rental	P		
fuel sales – liquid, wholesale and retail	P		
funeral and interment establishments, wholesale and storage	C		
janitorial cleaning services	P		
janitorial/cleaning supply store, wholesale	P		
laundry and/or dry cleaning establishments, full service	P		
lawn and garden supply, wholesale	P		
locksmith shop, service	P		
manufactured home sale lots	C		
pawn shop and pawnbrokers	P		Code of Ord. Chap 78
pest control services	P		
print and publication shops	P		
scrap hauling service	P		
sewer and septic tank service	C		
vending supply and service	P		
<b>Transportation facilities</b>			
airport	C		
administrative offices/dispatches	C		
commuter lot	C		
stations or terminals	C		
<b>Utility and area service provider facilities</b>			
emergency management services – fire, police, ambulance	P	See Article XI	
garbage and recycling collection services	C		
landfills, incinerators, and dumps	X		
recycling center	C		
<b>private sewage treatment facilities</b>	<b>C</b>		
telecommunications facility, radio and television stations	P		
telecommunications facility towers and antenna	P		
utility administrative office	P		
utility transformers, substations, and towers	P		
<b>Distribution and storage facilities</b>			
warehouse, self-service(mini)	P		
warehouse	P		
distribution warehouse facility	P		
<b>Motor vehicles and equipment</b>			
<b>passenger vehicles and small engine equipment</b>			
body repair and painting	P		
car wash, service or self-service	P		
fuel sales	P		
general service/installation of parts/accessories	P		
new or used, sales and rental	P		
parts/accessories, sales	P		
tires, sales	P		
vehicle storage yard	P		
welding and fabrication	P		
wrecker and/or towing, service	P		



<b>heavy trucks, RVs and other heavy equipment</b>		
body repair and painting	P	
fueling station	P	
general service/installation of parts and accessories	P	
new or used, sales and rental	P	
parts/accessories/tires, sales	P	
truck wash, service or self-service	P	
terminal, motor freight	P	
truck stop/travel plaza	P	

➤ ***Section 650.4: Amend language in the special site requirements for Planned Development Districts. Remove the minimum area requirement for Planned Development Districts located throughout the City and inside the Livable Cities Initiative District (LCI) in order to enable more Planned Districts within the City. Reduce the minimum frontage requirement for Planned Development Districts located in the LCI District.***

650.4 Special Site Requirements. The site proposed for Planned Development District classification must ~~contain a minimum area: 1) PRD between twelve (12) and forty eight (48) acres, 2) PCD/PPD: between twenty four (24) and sixty (60) acres, and 3) PID: at least twenty four (24) acres, unless a smaller are is specifically approved by the Planning Commission and Council due to special and unusual circumstances related to the topography of the site. In no case shall any planned unit development be less than ten (10) acres. The site must~~ but a public street for continuous distance of at least one-hundred (100) feet.

The only exception to ~~these size~~ this frontage requirements shall be in the Livable Cities Initiative District. Because of the special and unique circumstances of both maximum density and unique mixture of land uses within the LCI District, proposals for Planned Development District classification in the LCI District must ~~contain a minimum of two (2) acres. The site must~~ but a public street for a distance of at least ~~seventy five (75)~~ fifty (50) feet.

**NOTICE TO THE PUBLIC  
CITY OF MONROE**

**The City of Monroe Planning Commission will be holding a hearing for a zoning action/zoning code text amendment of Article VI, Section 630.3, Table 6 and Section 650.4. A public hearing will be held on October 19, 2021 at 5:30 P. M. in the City Hall Building at 215 N. Broad Street.**

**The City of Monroe Council will be holding a hearing for a zoning action/zoning code text amendment of Article VI, Section 630.3, Table 6 and Section 650.4. A public hearing will be held on November 9, 2021 at 6:00 P.M. in the City Hall Building at 215 N Broad Street.**

**All those having an interest should be present.**

**Please run on the following date:**

**October 3, 2021**



**To:** City Council  
**From:** Logan Propes  
**Department:** Administration  
**Date:** 11/02/2021  
**Subject:** TEFRA Resolution approving the Valdosta Public Housing Authority vis-a-vis the Monroe Housing Authority to issue revenue bonds for local apartment rehabilitation project.

**Budget Account/Project Name:** N/A

**Funding Sources:** N/A

**Budget Allocation:** N/A

**Budget Available:** N/A

**Requested Expense:** N/A **Company of Purchase:** N/A

**Description:**

Staff recommends that the City Council approve the TEFRA Resolution as presented.

**Background:**

The City was approached by Bond Counsel for the Valdosta Housing authority to authorize a resolution for the Valdosta Housing Authority to exercise its powers within the city limits of Monroe for the purpose of financing a proposed multifamily housing project acquisition and rehabilitation.

The \$11,000,000 in bonds will be used as tax exempt interim financing until the owners convert to permanent financing. The project in Monroe would consist of the rehabilitation of the Country Grove Apartments on Plaza Trace. These apartments will be completely updated inside and out including energy efficient appliances and building materials. According to their counsel, no one will be displaced in the process.

THE BONDS SHALL NOT EVER REPRESENT OR CONSTITUTE A DEBT OR PLEDGE OF THE FAITH AND CREDIT OR THE TAXING POWER OF THE CITY OR ANY OTHER POLITICAL SUBDIVISION AND SHALL SOLELY BE SECURED AND PAYABLE FROM COLLATERAL PROVIDED BY THE BORROWER.

There is no pass-through financing, just authorization of the VHA to create financing project in Monroe.

**Attachment(s):**

- City of Monroe Resolution
- Public Hearing Notice
- Monroe Housing Authority Resolution (no action by City)



**A RESOLUTION OF HOUSING AUTHORITY OF THE CITY OF MONROE  
AUTHORIZING THE VALDOSTA HOUSING AUTHORITY TO ISSUE BONDS TO  
FINANCE THE RENOATION OF A MULTIFAMILY PROJECT LOCATED IN THE  
CITY OF MONROE, GEORGIA**

WHEREAS, New Country Grove LLC, a Georgia limited liability company (the “Borrower”), and its affiliates, desire to renovate an existing multifamily rental housing facility located at 686 Plaza Trace, Monroe, Georgia 30655, presently known as Country Grove (the “Monroe Project”); and

WHEREAS, based on its overall financing plans, the Borrower and its affiliates desire to have the Valdosta Housing Authority (the “Valdosta Housing Authority”) issue its revenue bonds or other appropriate obligations (the “Bonds”) and to lend the proceeds of the Bonds to the Borrower for the purpose of financing the acquisition, renovation, furnishing and equipping of the proposed Project, in furtherance of the purposes of O.C.G.A. Section 8-3-1, *et seq.*, as amended (the “Housing Authorities Law”), as well as other projects (the “Other Projects”) located in other jurisdictions in the State of Georgia; and

WHEREAS, the Housing Authorities Law, specifically O.C.G.A. Section 8-3-15 provides that a housing authority created for a city may exercise its powers within the territorial limits of another municipality for the purpose of, among other things, financing a project within such municipality, provided that a resolution shall have been adopted by the city in which the authority is to exercise its powers, along with any housing authority which shall have been theretofore established in such city declaring that there is a need for the housing authority to exercise its extraterritorial powers within such city (the “Authority Consent Resolution”); and

WHEREAS, the Borrower has requested that the Housing Authority of the City of Monroe (the “Housing Authority of the City of Monroe”) consider the adoption of an Authority Consent Resolution, providing for the Valdosta Housing Authority to issue bonds, in one or more series, to finance the Monroe Project to be located within the City of Monroe; and

WHEREAS, after review of the nature of the proposed Monroe Project, the Housing Authority of the City of Monroe has determined that due to extenuating circumstances limited to this specific project there is a need to vary from its policy of being the only housing authority to operate in the City of Monroe and allow the Valdosta Housing Authority, on this single occasion, to operate within the area served by the Housing Authority of the City of Monroe solely for the purpose of issuing the Bonds to finance the Monroe Project, together with the Other Projects; and

WHEREAS, in exchange for the Housing Authority of the City of Monroe giving its written consent to allow the Valdosta Housing Authority to issue the Bonds on this one-time basis, at closing, the Borrower shall pay to the Housing Authority of the City of Monroe a fee equal to \$3,750 relating to the principal amount of the Bonds apportioned to the Monroe Project, together with the legal costs of the Housing Authority of the City of Monroe in the amount of \$1,250.

**NOW, THEREFORE, BE IT RESOLVED by the BOARD OF COMMISIONERS OF THE HOUSING AUTHORITY OF THE CITY OF MONROE and it is hereby resolved by authority of the same as follows:**

The Housing Authority of the City of Monroe hereby approves in this single instance the operation of the Valdosta Housing Authority within the City of Monroe for the sole purpose of issuing the Bonds to finance the acquisition, renovation and equipping of the Monroe Project. This approval is given solely for the purpose of compliance with provisions of the Housing Authorities Law and in no event shall this approval constitute any obligation on the part of the Housing Authority of the City of Monroe with respect to the Bonds. The Housing Authority of the City of Monroe shall have no financial obligation or responsibility with respect to the Bonds, the Monroe Project or the Other Projects. Furthermore, it is the policy of the Housing Authority of the City of Monroe consistent with applicable Housing Authority Law that it is the proper housing authority to operate in the City of Monroe and by giving its consent in this single instance the Housing Authority of the City of Monroe in no way waives this policy or consents to any operation in the future of the Valdosta Housing Authority or any other municipal housing authority in the City of Monroe.

[Signature to Follow]

This the \_\_\_\_ day of \_\_\_\_ 2021.

**HOUSING AUTHORITY OF THE CITY OF  
MONROE**

(SEAL)

By: \_\_\_\_\_  
Chairman

ATTEST:

By: \_\_\_\_\_  
Secretary



**RESOLUTION OF THE MAYOR AND CITY COUNCIL OF MONROE, GEORGIA,  
AUTHORIZING THE VALDOSTA HOUSING AUTHORITY TO EXERCISE ITS  
POWERS WITHIN THE CITY OF MONROE FOR THE PURPOSE OF FINANCING A  
PROPOSED MULTIFAMILY HOUSING PROJECT**

**WHEREAS**, the Mayor and Council (“**City Council**”) of the City of Monroe, Georgia (the “**City**”), have been informed by representatives of New Country Grove LLC, a Georgia limited liability company (the “**Borrower**”), that the Borrower and its affiliates, desire to renovate an existing multifamily rental housing facility located at 686 Plaza Trace, Monroe, Georgia 30655 (the “**Project**”), as well as other projects located in other jurisdictions in the State of Georgia; and

**WHEREAS**, the Housing Authorities Law of the State of Georgia (O.C.G.A. Section 8-3-1 et seq.), as amended (the “**Act**”) and specifically O.C.G.A. Section 8-3-15 provides that a housing authority created for a city may exercise its powers within the territorial limits of another municipality for the purpose of, among other things, financing a project within such municipality, provided that a resolution shall have been adopted by the city in which the authority is to exercise its powers, along with any housing authority which shall have been theretofore established in such city declaring that there is a need for the housing authority to exercise its extraterritorial powers within such city (the “**City Resolution**”); and

**WHEREAS**, Valdosta Housing Authority (the “**Valdosta Housing Authority**”) has adopted an inducement resolution under which it agreed in principle to issue its revenue bonds or other appropriate obligations in amount not to exceed \$11,000,000 (the “**Bonds**”) and to lend the proceeds of the Bonds to the Borrower for the purpose of financing in part the acquisition, rehabilitation, construction and development of the Project, in furtherance of the purposes of the Act; and

**WHEREAS**, the Borrower has requested that the City Council of the City adopt this City Resolution declaring the need for the Valdosta Housing Authority to exercise its powers within the jurisdiction of the City for the sole purpose of issuing the Bonds in order to finance the Project; and

**WHEREAS**, another purpose of this City Resolution is to satisfy the public approval requirement of Section 147(f) of the Internal Revenue Code of 1986, as amended (the “**Code**”), in order to qualify the interest on the Bonds for exclusion from the gross income of the owners thereof for federal income tax purposes pursuant to the applicable provisions of the Code; and

**WHEREAS**, after publication of a notice at least 7 days prior to the date of this City Resolution, which notice of the hearing was published in the *Walton Tribune*, a newspaper of general circulation in the City, on this date a public hearing was held regarding the Bonds and the Project being financed in part with the proceeds of the Bonds; and

**WHEREAS**, THE BONDS SHALL NOT EVER REPRESENT OR CONSTITUTE A DEBT OR PLEDGE OF THE FAITH AND CREDIT OR THE TAXING POWER OF THE CITY, WALTON COUNTY, THE STATE OF GEORGIA OR ANY POLITICAL

SUBDIVISION THEREOF AND SHALL SOLELY BE SECURED AND PAYABLE FROM COLLATERAL SPECIFICALLY PLEDGED THEREFOR BY THE BORROWER UNDER THE FINANCING AGREEMENT; and

**WHEREAS**, after careful study and investigation of the nature of the proposed Project and as required by the Act, City Council has determined that it is in the best interest of the inhabitants of the City that the Valdosta Housing Authority issue its revenue bonds in one or more series to finance the Project located within the boundaries of the City.

**NOW, THEREFORE, BE IT RESOLVED** by the MAYOR AND CITY COUNCIL OF THE CITY OF MONROE, GEORGIA and IT IS HEREBY RESOLVED by the City of Monroe, Georgia, as follows:

1. For the sole purpose of complying with the Act, the City finds that the Project will provide safe and sanitary accommodations, that the best means to facilitate the financing for the Project is by the authorizing the Valdosta Housing Authority to exercise its powers within the territorial boundaries of the City for the sole purpose of issuing the Bonds, and that there is hereby declared a need for the Valdosta Housing Authority to exercise such extraterritorial powers.
2. For the sole purpose of qualifying the interest on the Bonds for exclusion from the gross income of the owners thereof for federal income tax purposes pursuant to applicable provisions of the Code, the issuance of the Bonds by Valdosta Housing Authority and the loaning of a portion of the proceeds to the Borrower for the purpose of financing in part the acquisition, rehabilitation, construction and development of the Project is approved.
3. This approval is given solely for the purpose of compliance with provisions of the Act and the Code and in no event shall this approval constitute any obligation on the part of the City with respect to the Bonds. The Bonds issued by the Valdosta Housing Authority shall not constitute a debt of the City within the meaning of any constitutional or statutory provision, and the City shall have no financial obligation or responsibility with respect to the Bonds or the Project.
4. This Resolution shall take effect immediately upon its adoption.

*[Signatures appear on the following page]*

SO RESOLVED AND EFFECTIVE, this 9<sup>th</sup> day of November 2021.

**MAYOR AND COUNCIL OF THE  
CITY OF MONROE, GEORGIA**

(SEAL)

By: \_\_\_\_\_  
Mayor

ATTEST:

By: \_\_\_\_\_  
City Clerk



**NOTICE OF PUBLIC HEARING**

**NOTICE IS HEREBY GIVEN** that on November 9, 2021, a public hearing as required by Section 147(f) of the Internal Revenue Code of 1986 will be held by the City of Monroe, Georgia (the “**City**”) with respect to the proposed plan of finance for the issuance by Valdosta Housing Authority of its revenue bonds or other revenue debt obligations in an aggregate principal amount not expected to exceed \$11,000,000 (the “**Bonds**”).

The proceeds of the Bonds will be lent to New Country Grove LLC (the “**Borrower**”) and its affiliates, to be used for the purpose of providing funds to: (i) finance a portion of the costs of the acquisition and renovation of an existing multifamily rental housing facility located at 686 Plaza Trace, Monroe, Georgia 30655 (the “**Monroe Project**”) as well as other projects located in other jurisdictions in the State of Georgia; and (ii) pay all or a portion of the costs of issuance of the Bonds. The Monroe Project will be owned and operated by the Borrower.

**THE BONDS SHALL NOT EVER REPRESENT OR CONSTITUTE A DEBT OR PLEDGE OF THE FAITH AND CREDIT OR THE TAXING POWER OF THE CITY OR ANY OTHER POLITICAL SUBDIVISION AND SHALL SOLELY BE SECURED AND PAYABLE FROM COLLATERAL PROVIDED BY THE BORROWER.**

The hearing will commence at 6:00 p.m. or as soon thereafter as the matter can be heard and will be held in the City Council Chambers, City Hall at 215 N. Broad Street, Monroe, Georgia 30655. Interested persons wishing to express their views on the issuance of the Bonds or on the nature or location of the Monroe Project may attend the public hearing or, prior to the time of the hearing, submit written comments to the City Clerk at 215 N. Broad Street, Monroe, Georgia 30655.

**CITY OF MONROE, GEORGIA**



**To:** City Council  
**From:** Logan Propes, City Administrator  
**Department:** Administration  
**Date:** 11/09/2021  
**Subject:** Service Delivery Strategy Update - Resolution & Sewer Map

**Budget Account/Project Name:**

**Funding Source:** N/A

**Budget Allocation:** N/A

**Budget Available:** N/A

**Requested Expense:** N/A **Company of Purchase:** N/A

**Description:**

This request is for the approval of the 2021 Service Delivery Strategy Update with Walton County and its municipalities.

Staff requests a motion approving the Resolution and the subsequent SDS forms 1-4 with map exhibits as presented.

**Background:**

A Service Delivery Strategy (SDS) is an agreement between Walton County and its municipalities to determine what services will be provided by which entity in order to provide efficient services to all citizens and avoid duplication of taxation to any. The last time the SDS was comprehensively updated was in 2019.

Before Council is an update of the SDS primarily relating to economic development services and utility services. The city of Monroe has specifically updated its sanitary sewer service area map to clarify boundaries of service areas and availability. The new sewer service map will replace Monroe’s service area as shown in in map #9. An original copy for DCA certification will be circulated for signatures.

**Attachment(s):**

- Resolution
- SDS Forms 1-4 with service area maps
- Updated Monroe Sewer Service Area Map

RESOLUTION OF  
THE CITY OF MONROE, GEORGIA

WHEREAS, in 2001, the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County (the “Authority”) acquired an approximately 1,620-acre site located south of Interstate 20 in Morgan, Newton and Walton Counties to develop a research park referred to as Stanton Springs; and

WHEREAS, in 2021, the Authority acquired an additional 665.17 acres north of Interstate 20 in Walton County, Morgan County and the City of Social Circle to develop an extension of Stanton Springs called Stanton Springs North; and

WHEREAS, to successfully market and develop Stanton Springs and Stanton Springs North and thereby generate jobs and investment in the region, the Authority requires the discretion to designate the most appropriate service provider based on ability to serve, proximity and tenant preference; and

WHEREAS, in 2012 the Walton County Service Delivery Strategy was updated to designate the Authority as the service provider for Water Supply and Distribution and Wastewater Collection and Treatment in Stanton Springs; and

WHEREAS, in April 2021, the Authority entered into a Intergovernmental Contract with Social Circle regarding Stanton Springs North which authorizes the Authority to designate service providers within the portion of Stanton Springs within the City of Social Circle; and

WHEREAS, Walton County and its cities seek to amend Walton County’s 2019 Service Delivery Strategy as updated in 2020 to include the Authority’s discretionary rights to determine service providers within Stanton Springs and Stanton Springs North as they exist now and as they may be expanded in the future for the following services: Building Inspections, Code Enforcement, Economic Development Services, Emergency Medical Services, Fire Protection, Natural Gas, Planning and Zoning, Wastewater Collection and Treatment, and Water Supply and Distribution; and

WHEREAS, the City of Monroe passed a Resolution on March 2, 2021 limiting its sanitary sewer wastewater utility services of any kind to the corporate city limits of the City of Monroe, Georgia with the exception of any property that is outside the corporate city limits but is currently connected to the City’s sewer system, and a 24-month allowance for property that is outside the corporate city limits and has paid a Sewer System Capacity Recovery Fee through an executed Development Agreement to connect to and be served by the Sewer System.; and

WHEREAS, Walton County and its cities seek to amend Walton County’s 2019 Service Delivery Strategy as updated in 2020 to include the City of Monroe, Georgia’s updated sanitary sewer service area as prescribed in its March 2, 2021 Resolution.

NOW, THEREFORE, BE IT RESOLVED by the City Council of Monroe, Georgia, that the City of Monroe supports the amendment to the Walton County Service Delivery Strategy which designates the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County as the service provider within Stanton Springs and Stanton Springs North for: Building Inspections, Code Enforcement, Economic Development Services, Emergency Medical Services, Fire Protection, Natural Gas, Planning and Zoning, Wastewater Collection and Treatment, and Water Supply and Distribution. If the Authority expands Stanton Springs or Stanton Springs North by resolution incorporating additional land therein, the Authority’s right to designate the service providers in the above-listed service areas shall extend



therewith.

The City also supports the amendment to the Walton County Service Delivery Strategy which incorporates the updates to the City of Monroe, Georgia’s sanitary sewer utility wastewater service area included in the March 2, 2021 Resolution and reflected in the updated forms and mapping to be included with the submission to the Georgia Department of Community Affairs.

All other portions of the 2019 Walton County Service Delivery Strategy as amended in 2020 shall remain unchanged.

MONROE, GEORGIA

This \_\_\_\_ day of \_\_\_\_\_, 2021.

By: \_\_\_\_\_  
John S. Howard, Mayor, City of Monroe

(SEAL)

Attest:

\_\_\_\_\_  
Debbie Kirk, Clerk, City of Monroe



**SERVICE DELIVERY STRATEGY**

**FORM 1**

COUNTY: **WALTON COUNTY**

**I. GENERAL INSTRUCTIONS:**

1. FORM 1 is required for **ALL** SDS submittals. Only one set of these forms should be submitted per county. The completed forms shall clearly present the collective agreement reached by all cities and counties that were party to the service delivery strategy.
2. List each local government and/or authority that provides services included in the service delivery strategy in Section II below.
3. List all services provided or primarily funded by each general purpose local government and/or authority within the county that are continuing *without change* in Section III, below. (It is acceptable to break a service into separate components if this will facilitate description of the service delivery strategy.)

<p><b>OPTION A</b> <i>Revising or Adding to the SDS</i></p>	<p><b>OPTION B</b> <i>Extending the Existing SDS</i></p>
<ol style="list-style-type: none"> <li>4. List all services provided or primarily funded by each general purpose local government and authority within the county which are revised or added to the SDS in Section IV, below. (It is acceptable to break a service into separate components if this will facilitate description of the service delivery strategy.)</li> <li>5. For <b>each</b> service or service component listed in Section IV, complete a separate, updated <i>Summary of Service Delivery Arrangements</i> form (FORM 2).</li> <li>6. Complete one copy of the <i>Certifications</i> form (FORM 4) and have it signed by the authorized representatives of participating local governments. [Please note that DCA cannot validate the strategy unless it is signed by the local governments required by law (see Instructions, FORM 4).]</li> </ol>	<ol style="list-style-type: none"> <li>4. In Section IV type, "NONE."</li> <li>5. Complete one copy of the <i>Certifications for Extension of Existing SDS</i> form (FORM 5) and have it signed by the authorized representatives of the participating local governments. [Please note that DCA cannot validate the strategy unless it is signed by the local governments required by law (see Instructions, FORM 5).]</li> <li>6. Proceed to step 7, below.</li> </ol> <div data-bbox="841 1182 1539 1413" style="background-color: #000080; color: white; padding: 10px; text-align: center;"> <p><b>For answers to most frequently asked questions on Georgia's Service Delivery Act, links and helpful publications, visit DCA's website at <a href="http://www.dca.ga.gov/development/PlanningQualityGrowth/programs/servicedelivery.asp">http://www.dca.ga.gov/development/PlanningQualityGrowth/programs/servicedelivery.asp</a>, or call the Office of Planning and Quality Growth at (404) 679-5279.</b></p> </div>

7. If any of the conditions described in the existing *Summary of Land Use Agreements* form (FORM 3) have changed or if it has been ten (10) or more years since the most recent FORM 3 was filed, update and include FORM 3 with the submittal.
8. Provide the completed forms and any attachments to your regional commission. The regional commission will upload digital copies of the SDS documents to the Department's password-protected web-server.

**NOTE: ANY FUTURE CHANGES TO THE SERVICE DELIVERY ARRANGEMENTS DESCRIBED ON THESE FORMS WILL REQUIRE AN UPDATE OF THE SERVICE DELIVERY STRATEGY AND SUBMITTAL OF REVISED FORMS AND ATTACHMENTS TO THE GEORGIA DEPARTMENT OF COMMUNITY AFFAIRS UNDER THE "OPTION A" PROCESS DESCRIBED, ABOVE.**

**II. LOCAL GOVERNMENTS INCLUDED IN THE SERVICE DELIVERY STRATEGY:**

In this section, list all local governments (including cities located partially within the county) and authorities that provide services included in the service delivery strategy.

Monroe, Loganville, Between, Jersey, Social Circle, Walnut Grove, Good Hope, Development Authority of Walton County, Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County, Loganville Development Authority, Loganville DDA, Loganville DA, Loganville URA, Loganville Housing Authority, Monroe DDA, Monroe URA, Monroe Housing Authority, Monroe Walton Center for the Arts, Newton County Water & Sewer Authority, Northeast GA Regional Solid Waste Mgmt Authority, Social Circle DDA, Social Circle DA, Social Circle Housing Authority, Uncle Remus Regional Library System, Walnut Grove DDA, Walton County, Walton County Hospital Authority, Walton County Senior Citizen Council, Madison, Covington, Winder, Buford

**III. SERVICES INCLUDED IN THE EXISTING SERVICE DELIVERY STRATEGY THAT ARE BEING EXTENDED WITHOUT CHANGE:**

In this section, list each service or service component already included in the existing SDS which will continue as previously agreed with no need for modification.

1. Airport Services
2. Animal Control
3. Cooperative Extension Services
4. Coroner
5. Cultural Resources
6. Electricity
7. Emergency Dispatch
8. Emergency Management Services
9. Indigent Defense
10. Jail
11. Law Enforcement
12. Libraries
13. Magistrate Court
14. Municipal Court
15. Parks and Recreation
16. Probate & Superior Court
17. Public Cemeteries
18. Public Health Services
19. Public Housing
20. Public Transportation
21. Road Construction and Maintenance
22. Senior Citizen Services
23. Solid Waste
24. Stormwater
25. Streetlights
26. Telecommunications
27. Voter Registration

**IV. SERVICES THAT ARE BEING REVISED OR ADDED IN THIS SUBMITTAL:**

In this section, list each new service or new service component which is being added and each service or service component which is being revised in this submittal. For each item listed here, a separate Summary of Service Delivery Arrangements form (FORM 2) must be completed.



1. Building Inspections
2. Code Enforcement
3. Economic Development
4. Emergency Medical Services
5. Fire Protection
6. Natural Gas
7. Planning & Zoning
8. Wastewater Collection and Treatment
9. Water Supply and Distribution



**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: *Building Inspections***

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service): **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **Walton County provides building inspections for the unincorporated areas except as otherwise designated by the Joint Development Authority of Jasper, Morgan, Newton & Walton County; Walton County provides building inspections for the Cities of Between and Good Hope. Loganville, Monroe, Social Circle, Jersey and Walnut Grove provide building inspections within their incorporated areas.**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that

will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.



## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<i>Local Government or Authority</i>	<i>Funding Method</i>
Walton County, Between, Good	Building Inspection Fees supplemented by General Fund
Loganville	Building Inspection Fees supplemented by General Fund
Monroe	Building Inspection Fees supplemented by General Fund
Walnut Grove	Building Inspection Fees supplemented by General Fund
Social Circle	Building Inspection Fees supplemented by General Fund
Jersey	Building Inspection Fees supplemented by General Fund

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties may designate Walton County, Newton County or Morgan County to provide building inspection services on property it owns or controls in Stanton Springs and Stanton Springs North per the Intergovernmental Contract re Development Services dated March 2, 2021.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<i>Agreement Name</i>	<i>Contracting Parties</i>	<i>Effective and Ending Dates</i>
Master Service Delivery Agr.	Walton County and All Cities	June 2019-June 2029
IGA	Walton/Between/Good Hope	July 28, 2005 - June 30- 2044
IGA	Walton, Newton, Morgan, Jasper Counties and SC	March 2, 2021 - March 2071

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None.

7. Person completing form: **Andrea Gray, Attorney for the Joint Development Authority of Jasper, Morgan, Newton & Walton Countie**

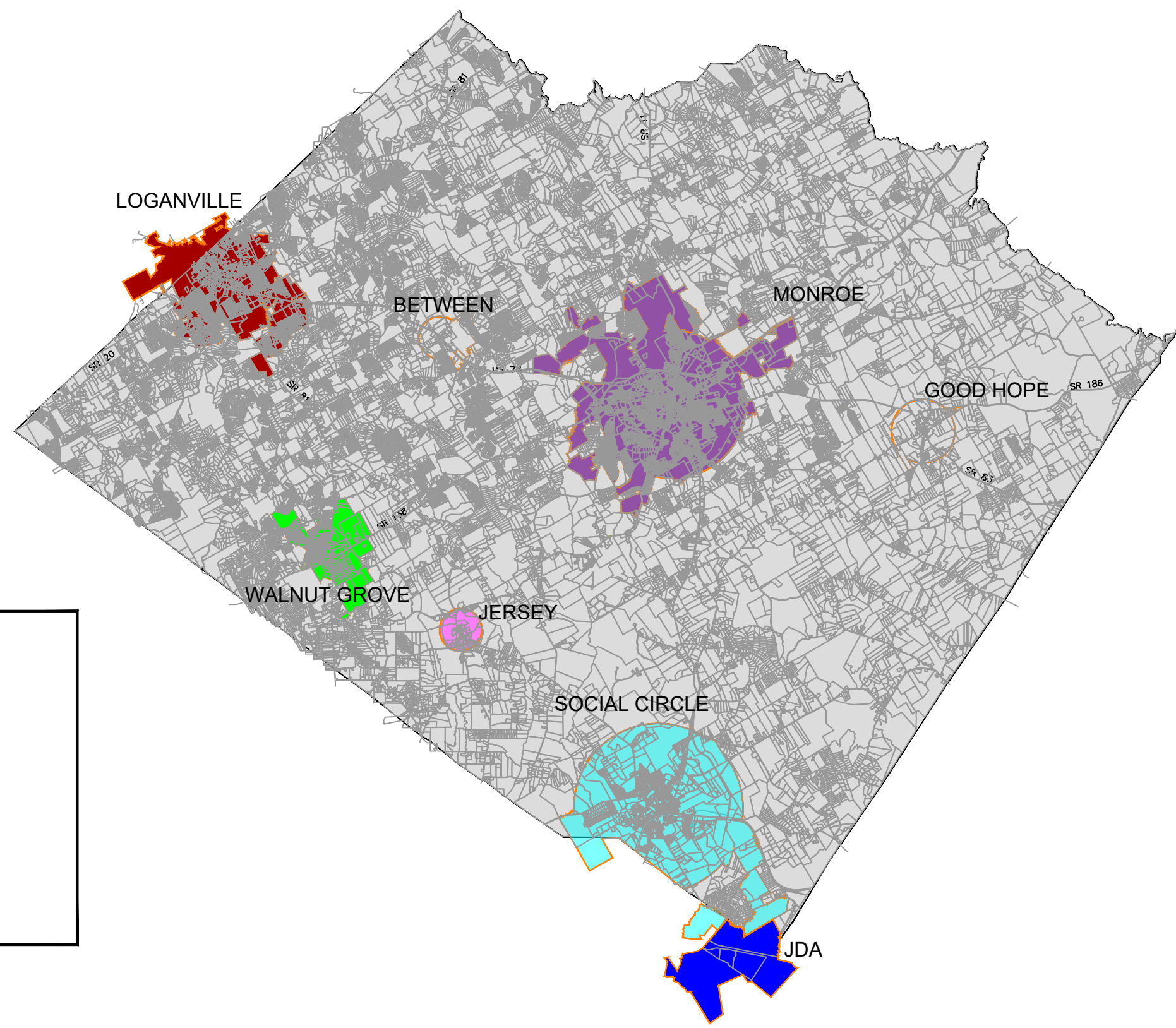
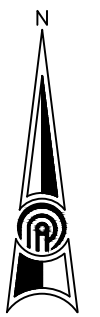
Phone number: **770-235-1083**      Date completed: 10/4/2021









8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**  
**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**  
**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**  
**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**  
**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**  
**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901  
CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046



-  CITY LIMITS
-  WALTON COUNTY
-  CITY OF JERSEY
-  CITY OF LOGANVILLE
-  CITY OF MONROE
-  CITY OF SOCIAL CIRCLE
-  CITY OF WALNUT GROVE
-  JDA

GRAPHIC SCALE



( IN FEET )  
1 inch = 15000 ft.

 **PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

WALTON COUNTY  
BUILDING INSPECTION  
SERVICE AREAS

SERVICE DELIVERY STRATEGY		
Land lot:	District:	Date: SEPT 2021
County: WALTON		<b>2</b>
Drawn By: SS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	





**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: Code Enforcement**

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service: **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **Walton County provides building inspections for the unincorporated areas except as otherwise designated by the Joint Development Authority of Jasper, Morgan, Newton & Walton County; Between, Good Hope, Loganville, Monroe, Social Circle, Jersey and Walnut Grove provide building inspections within their incorporated areas.**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.

## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<i>Local Government or Authority</i>	<i>Funding Method</i>
County and All Cities	Fines and General Fund

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties may designate Walton County, Newton County or Morgan County to provide building inspection and code enforcement services on property it owns or controls in Stanton Springs and Stanton Springs North per the Intergovernmental Contract re Development Services dated March 2, 2021.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<i>Agreement Name</i>	<i>Contracting Parties</i>	<i>Effective and Ending Dates</i>
Master Service Delivery Agr.	Walton County and All Cities	June 2019-June 2029
IGA	Walton, Newton, Morgan, Jasper Counties and SC	March 2, 2021 - March 2071

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None

7. Person completing form: **Andrea Gray, Attorney for the Joint Development Authority of Jasper, Morgan, Newton & Walton Countie**

Phone number: **770-235-1083**      Date completed: 10/4/2021

8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**  
**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**  
**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**  
**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**  
**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**  
**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**





**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: *Economic Development Services***

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service): **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, attach a legible map delineating the service area of each service provider, and identify the government, authority, or other organization that will provide service within each service area.): **The Development Authority of Walton County serves countywide. In addition, Cities provide specific economic development services within their boundaries and the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County provides services to properties it controls in Stanton Springs and Stanton Springs North by contract. The City development authorities include: Loganville Development Authority, Loganville Downtown Development Authority, Loganville Urban Redevelopment Agency, Monroe Downtown Development Authority, Monroe Urban Redevelopment Agency, Social Circle Development Authority, Social Circle Downtown Development Authority, Walnut Grove Downtown Development Authority**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

**Yes** (if "Yes," you must attach additional documentation as described, below)

**No**

If these conditions will continue under this strategy, attach an explanation for continuing the arrangement (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that

overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.

**Page 1 of 2**

## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<b>Local Government or Authority</b>	<b>Funding Method</b>
Development Authority of Walton Co.	Contract with Walton County Board of Commissioners
City of Loganville	General Fund
City of Monroe	General Fund
City of Social Circle	General Fund
City of Walnut Grove	General Fund

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties ("JDA") may determine the economic development representative to represent its interest in Stanton Springs and Stanton Springs North. It has existing contracts with the Walton County Development Authority and the Newton County Industrial Development Authority.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<b>Agreement Name</b>	<b>Contracting Parties</b>	<b>Effective and Ending Dates</b>
Economic Development.	Development Authority of Walton County and JDA	July 1, 2015 - June 30, 2022
Contract for Econ. Dev Servic	JDA and Newton County Industrial Dev Authority	July 2020 - May 30, 2023
Master Service Delivery Agr.	Walton County and all Cities	July 2019-July 2029
Contract for Econ. Dev. Servic	JDA and Development Authority of Walton County	May 29, 2018 - May 30, 2023

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None

7. Person completing form: **Andrea Gray, Attorney for Joint Development Authority of Jasper, Morgan, Newton & Walton Counties**

Phone number: **770-235-1083**      Date completed: 10/4/2021

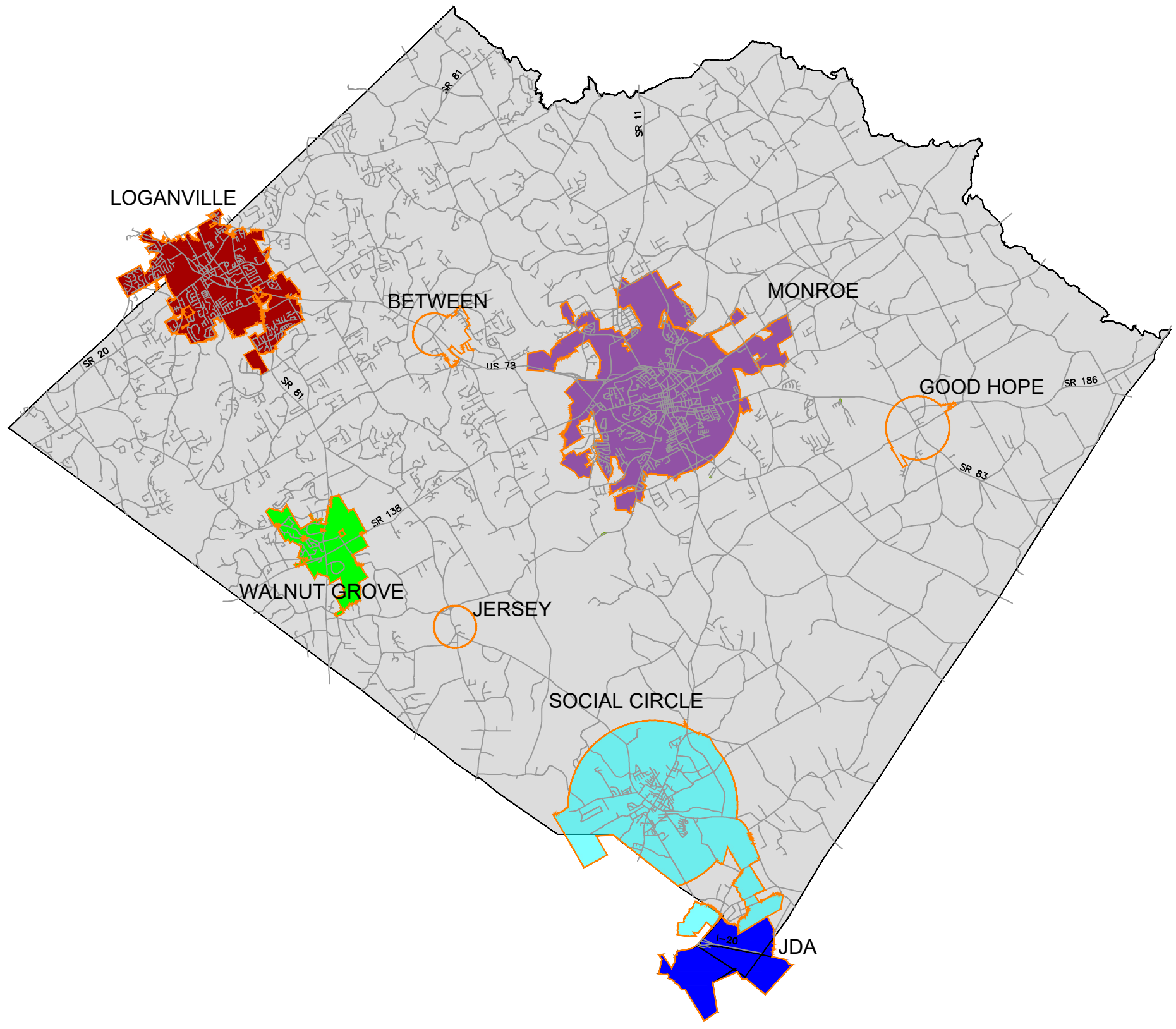
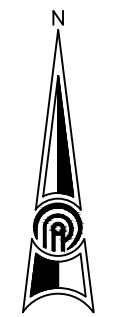
8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**  
**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**  
**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**  
**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**  
**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**  
**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

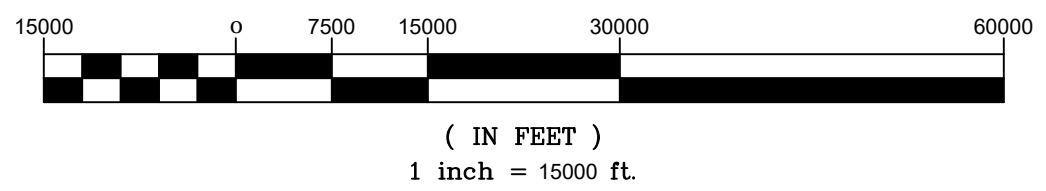


**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**



- CITY LIMITS
- DEVELOPMENT AUTHORITY OF WALTON COUNTY (COUNTY WIDE)
- LOGANVILLE DEVELOPMENT AUTHORITY, LOGANVILLE URBAN REDEVELOPMENT AGENCY, AND LOGANVILLE DOWNTOWN DEVELOPMENT AUTHORITY
- MONROE DOWNTOWN DEVELOPMENT AUTHORITY AND MONROE REDEVELOPMENT AGENCY
- SOCIAL CIRCLE DEVELOPMENT AUTHORITY AND SOCIAL CIRCLE DOWNTOWN DEVELOPMENT AUTHORITY
- WALNUT GROVE DOWNTOWN DEVELOPMENT AUTHORITY
- JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON, AND WALTON COUNTIES

GRAPHIC SCALE



**PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

WALTON COUNTY  
ECONOMIC DEVELOPMENT  
SERVICE AREAS

SERVICE DELIVERY STRATEGY		
Land lot:	District:	Date: SEP 2021
County: WALTON		1
Drawn By: SS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	



**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: *Emergency Medical Services***

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service: **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County determines the service provider within Stanton Springs and Stanton Springs North otherwise, Walton County provides services countywide**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.



## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<b>Local Government or Authority</b>	<b>Funding Method</b>
Walton County	General Fund, User Fees

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties ("JDA") may determine the service provider within Stanton Springs and Stanton Springs North.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<b>Agreement Name</b>	<b>Contracting Parties</b>	<b>Effective and Ending Dates</b>
Master Service Delivery Agr.	Walton County and all Cities	July 2019-July 2029

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None.

7. Person completing form: **Andrea Gray, Attorney for Joint Development Authority of Jasper, Morgan, Newton & Walton Counties**

Phone number: **770-235-1083**      Date completed: 10/4/2021

8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

- WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**
- CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**
- CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**
- CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**
- CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**
- CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**



**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: Fire Protection**

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service): **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County determines the fire service provider within Stanton Springs and Stanton Springs North otherwise, the City of Loganville, City of Moroe, and City of Social Circle will provide fire service within their incorporated boundaries. Walton County will provide fire service within the unincorporated area and the Cities of Between, Good Hope, Walnut Grove, and Jersey through a Special Service District, A Fire Service District.**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).



If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.

## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<b>Local Government or Authority</b>	<b>Funding Method</b>
Walton County	County Insurance Taxes supplemented with Fire SSD Revenue
Loganville	General Fund
Monroe	General Fund
Social Circle	General Fund

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties ("JDA") may determine the service provider within Stanton Springs and Stanton Springs North.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<b>Agreement Name</b>	<b>Contracting Parties</b>	<b>Effective and Ending Dates</b>
SSD - Fire Service	Walton Co, Good Hope, Between, Walnut Grove Jersey	April 4 2017 - Ongoing
IGA re Stanton Springs North	JDA and Social Circle	April 27, 2021 - April 2071

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None.

7. Person completing form: **Andrea Gray, Attorney for Joint Development Authority of Jasper, Morgan, Newton & Walton Counties**

Phone number: **770-235-1083**      Date completed: 10/4/2021

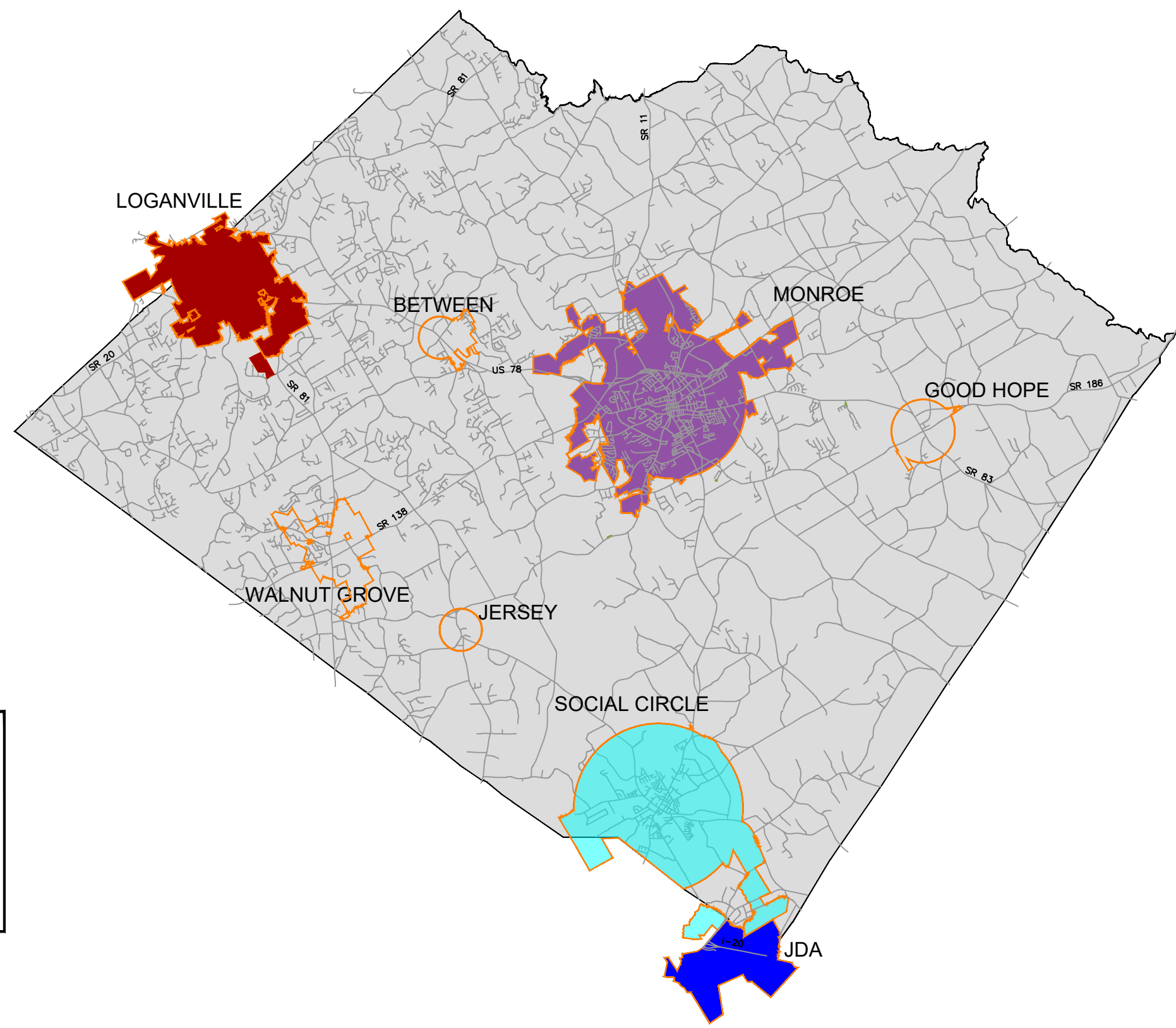
8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**  
**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**  
**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**  
**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**  
**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**  
**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**





- CITY LIMITS
- WALTON COUNTY
- CITY OF LOGANVILLE
- CITY OF MONROE
- CITY OF SOCIAL CIRCLE
- JDA

GRAPHIC SCALE



( IN FEET )  
1 inch = 15000 ft.

**PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

WALTON COUNTY  
FIRE PROTECTION SERVICE  
AREAS

SERVICE DELIVERY STRATEGY		
Land lot:	District:	Date: SEPT 2021
County: WALTON		<b>4</b>
Drawn By: SS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	



**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: *Natural Gas***

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service): **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County determines the gas service provider within Stanton Springs and Stanton Springs North otherwise, the following provide services: City of Monroe, City of Winder (Barrow County), City of Madison (Morgan County), City of Lawrenceville (Gwinnett County), City of Social Circle, City of Buford (Gwinnett County), City of Covington (Newton County) and City of Atlanta.**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
  
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.

## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<b>Local Government or Authority</b>	<b>Funding Method</b>
Monroe, Social Circle, Madison	User Fees
Lawrenceville, Winder, Buford	User Fees
Covington, Atlanta	User Fees

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties ("JDA") may determine the service provider within Stanton Springs and Stanton Springs North.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<b>Agreement Name</b>	<b>Contracting Parties</b>	<b>Effective and Ending Dates</b>
Master Service Delivery Agree	Walton County/Between/Good Hope/Jersey/Loganville	July 2019 - July 2029
	Monroe/Social Circle/Walnut Grove	
IGA re Stanton Springs North	JDA and Social Circle	April 27, 2021 - April 2071

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None

7. Person completing form: **Andrea Gray, Attorney for Joint Development Authority of Jasper, Morgan, Newton & Walton Counties**

Phone number: **770-235-1083**      Date completed: 10/4/2021

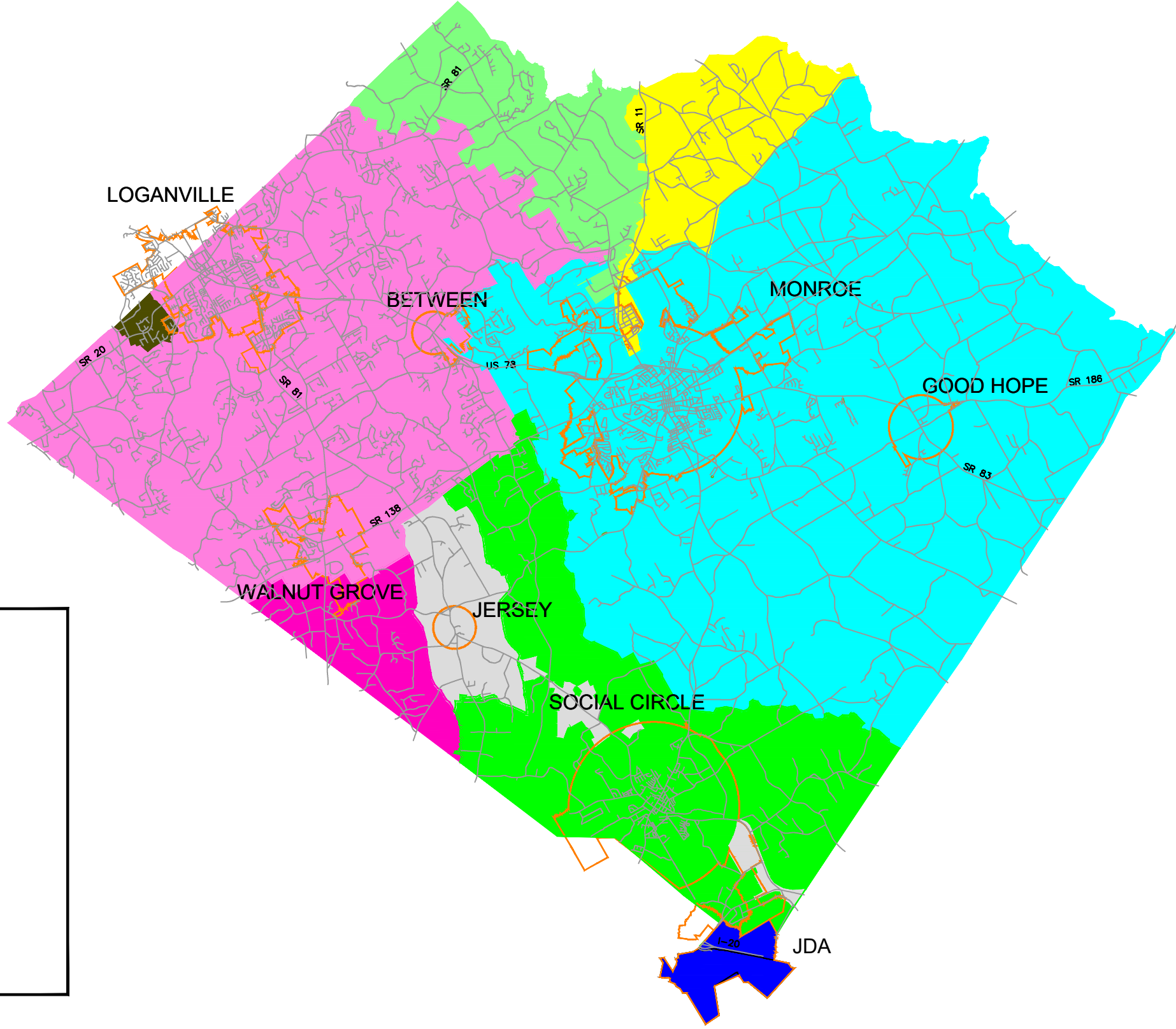
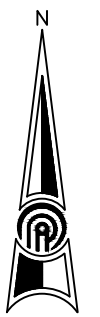
8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**  
**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**  
**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**  
**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**  
**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**  
**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**



**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**



- CITY LIMITS
- CITY OF MONROE
- CITY OF BUFORD
- CITY OF LAWRENCEVILLE
- CITY OF COVINGTON
- CITY OF SOCIAL CIRCLE
- CITY OF WINDER
- CITY OF MADISON
- ATLANTA GAS LIGHT
- JDA

GRAPHIC SCALE



( IN FEET )  
1 inch = 15000 ft.

**PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

WALTON COUNTY  
NATURAL GAS  
SERVICE AREAS

SERVICE DELIVERY STRATEGY		
Land lot:	District:	Date: SEP 2021
County: WALTON		<b>7</b>
Drawn By: SS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	



**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: *Planning and Zoning***

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service): **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County determines the planning and zoning service provider within Stanton Springs and Stanton Springs North otherwise, the following provide services: Walton County, City of Loganville, City of Monroe, City of Social Circle, City of Walnut Grove, City of Jersey, City of Good Hope, City of Between**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that

will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.



## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<b>Local Government or Authority</b>	<b>Funding Method</b>
Walton County	User Fees, Business Licenses, Franchise Tax, Financial Inst. Taxes
Loganville	User Fees and General Fund
Monroe	User Fees and General Fund
Walnut Grove	User Fees and General Fund
Social Circle	User Fees and General Fund
Jersey, Good Hope, Between	User Fees and General Fund

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties ("JDA") may determine the service provider within Stanton Springs and Stanton Springs North.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<b>Agreement Name</b>	<b>Contracting Parties</b>	<b>Effective and Ending Dates</b>
Master Service Delivery Agree	Walton County/Between/Good Hope/Jersey/Loganville	July 2019 - July 2029
	Monroe/Social Circle/Walnut Grove	
IGA re Development Services	JDA, Walton Co, Newton Co, Morgan Co, Jasper Co	March 2, 2021 - March 2071

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None

7. Person completing form: **Andrea Gray, Attorney for Joint Development Authority of Jasper, Morgan, Newton & Walton Counties**

Phone number: **770-235-1083**

Date completed: 10/4/2021

8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**

**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**

**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**

**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**

**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**

**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**



**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: *Wastewater Collection and Treatment***

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service: **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County determines the wastewater collection and treatment service provider within Stanton Springs and Stanton Springs North which is currently the Newton County Water & Sewer Authority, otherwise, the following provide services: City of Loganville, City of Monroe, City of Social Circle and City of Walnut Grove**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that

will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.



## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<i>Local Government or Authority</i>	<i>Funding Method</i>
JDA	User Fees/Grants
Loganville	User Fees/Grants
Monroe	User Fees/Grants
Walnut Grove	User Fees/Grants
Social Circle	User Fees/Grants

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties ("JDA") may determine the service provider within Stanton Springs and Stanton Springs North.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<i>Agreement Name</i>	<i>Contracting Parties</i>	<i>Effective and Ending Dates</i>
Master Service Delivery Agree	Walton County/Between/Good Hope/Jersey/Loganville	July 2019 - July 2029
	Monroe/Social Circle/Walnut Grove	
IGA re Sewer Service	JDA, Walton County, Newton County, Morgan County	7/23/2002 - 7/23/2052
	Jasper County, Social Circle	
IGA re Stanton Springs North	JDA and Social Circle	April 2021 - April 2071

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None

7. Person completing form: **Andrea Gray, Attorney for Joint Development Authority of Jasper, Morgan, Newton & Walton Counties**

Phone number: **770-235-1083**

Date completed: 10/4/2021

8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**

**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**

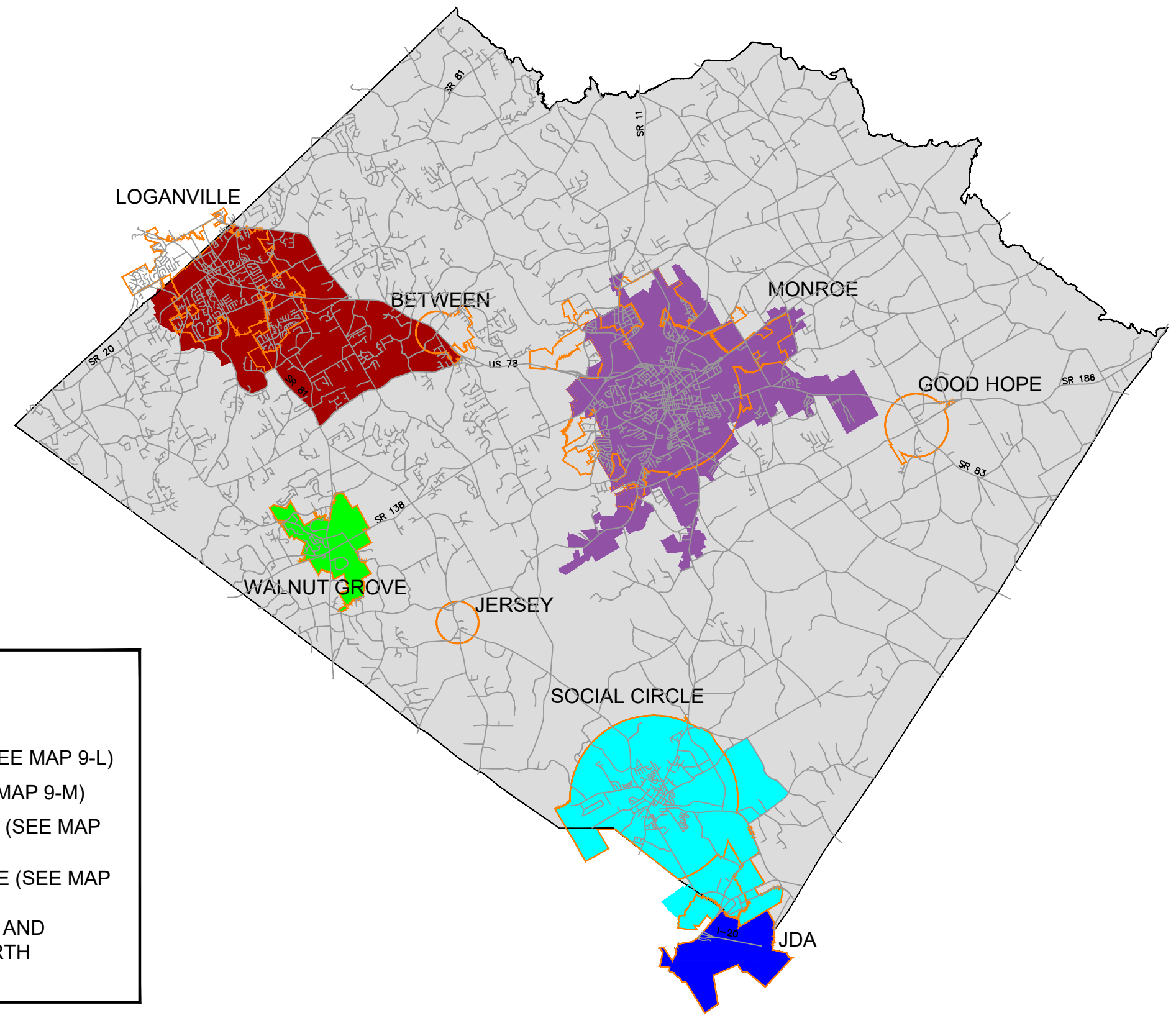
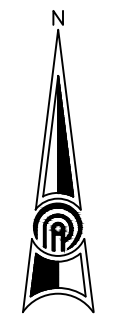
**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**








**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**

**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**

**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**



-  CITY LIMITS
-  WALTON COUNTY
-  CITY OF LOGANVILLE (SEE MAP 9-L)
-  CITY OF MONROE (SEE MAP 9-M)
-  CITY OF SOCIAL CIRCLE (SEE MAP 9-SC)
-  CITY OF WALNUT GROVE (SEE MAP 9-WG)
-  JDA STANTON SPRINGS AND STANTON SPRINGS NORTH (NCWSA SEWER)

GRAPHIC SCALE



( IN FEET )  
1 inch = 15000 ft.

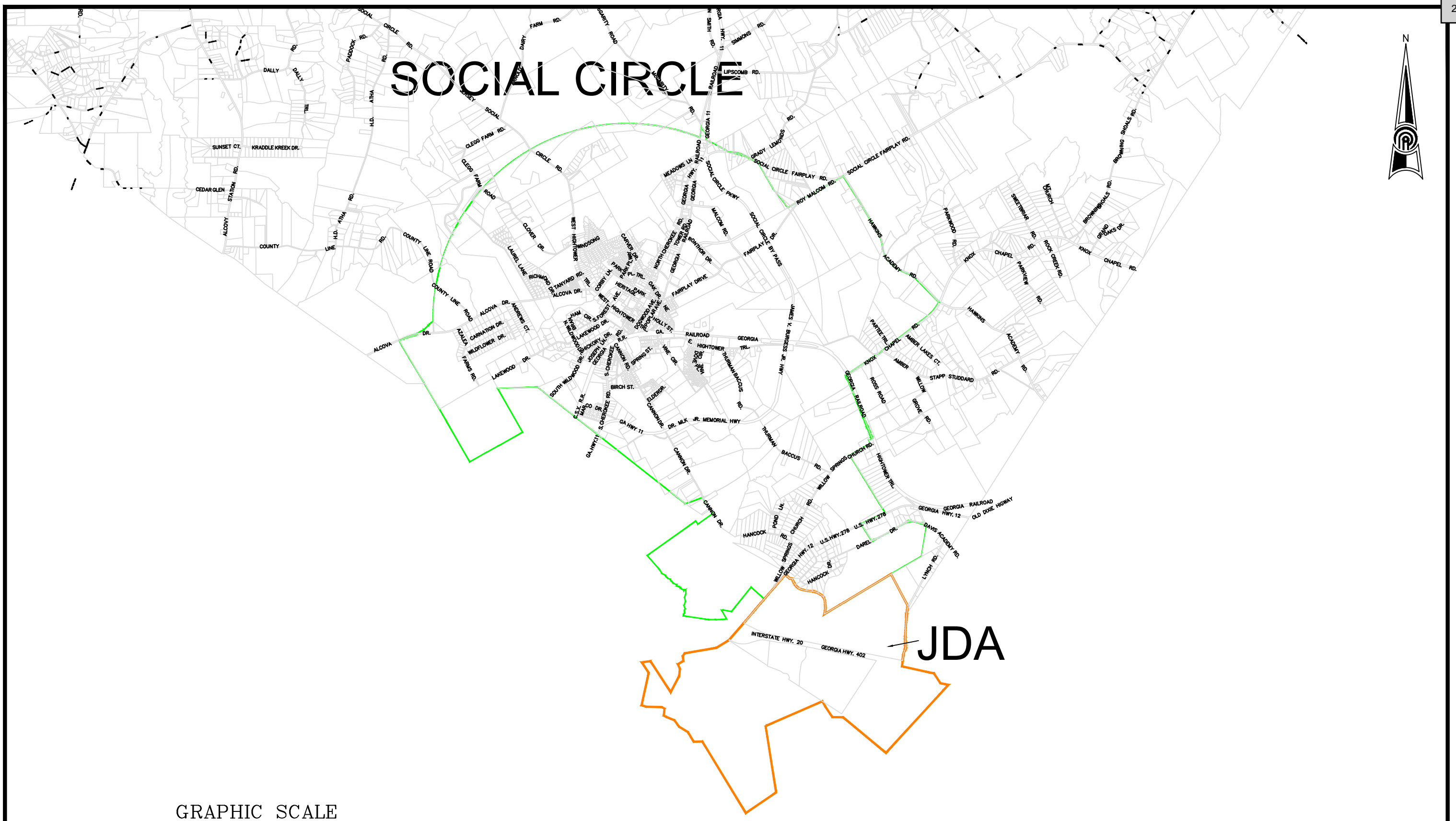
 **PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

WALTON COUNTY  
SEWER SERVICE AREAS

SERVICE DELIVERY STRATEGY		
Land lot:	District:	Date: SEPT 2021
County: WALTON		<b>9</b>
Drawn By: SS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	



# SOCIAL CIRCLE



## JDA

### GRAPHIC SCALE



( IN FEET )  
1 inch = 5000 ft.

- CITY LIMITS
- SEWER SERVICE AREA

**PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

CITY OF SOCIAL CIRCLE  
SEWER SERVICE AREA

### SERVICE AREA MAP

Land lot:	District:	Date: AUGUST 2019
County: WALTON		<b>9-SC</b>
Drawn By: AS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	





**SERVICE DELIVERY STRATEGY**

**FORM 2: Summary of Service Delivery Arrangements**

**Instructions:**

**Make copies of this form and complete one for each service listed on FORM 1, Section IV.** Use EXACTLY the same service names listed on FORM 1. Answer each question below, attaching additional pages as necessary. If the contact person for this service (listed at the bottom of the page) changes, this should be reported to the Department of Community Affairs.

**COUNTY: WALTON COUNTY**

**Service: *Water Supply and Distribution***

1. Check one box that best describes the agreed upon delivery arrangement for this service:

- a.)  Service will be provided countywide (i.e., including all cities and unincorporated areas) by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- b.)  Service will be provided only in the unincorporated portion of the county by a single service provider. (If this box is checked, identify the government, authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- c.)  One or more cities will provide this service only within their incorporated boundaries, and the service will not be provided in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service): **Type Name of Government, Authority or Organization Here**
  
- d.)  One or more cities will provide this service only within their incorporated boundaries, and the county will provide the service in unincorporated areas. (If this box is checked, identify the government(s), authority or organization providing the service.): **Type Name of Government, Authority or Organization Here**
  
- e.)  Other (If this box is checked, **attach a legible map delineating the service area of each service provider**, and identify the government, authority, or other organization that will provide service within each service area.): **the Joint Development Authority of Jasper County, Morgan County, Newton County and Walton County determines the water service provider within Stanton Springs and Stanton Springs North which is currently the Newton County Water & Sewer Authority, otherwise, the following provide services: Walton County, City of Loganville, City of Monroe, City of Social Circle and City of Jersey**

2. In developing this strategy, were overlapping service areas, unnecessary competition and/or duplication of this service identified?

- Yes** (if "Yes," you must attach additional documentation as described, below)
- No**

If these conditions will continue under this strategy, **attach an explanation for continuing the arrangement** (i.e., overlapping but higher levels of service (See O.C.G.A. 36-70-24(1)), overriding benefits of the duplication, or reasons that overlapping service areas or competition cannot be eliminated).

If these conditions will be eliminated under the strategy, **attach an implementation schedule** listing each step or action that

will be taken to eliminate them, the responsible party and the agreed upon deadline for completing it.

## SDS FORM 2, continued

3. List each government or authority that will help to pay for this service and indicate how the service will be funded (e.g., enterprise funds, user fees, general funds, special service district revenues, hotel/motel taxes, franchise taxes, impact fees, bonded indebtedness, etc.).

<i>Local Government or Authority</i>	<i>Funding Method</i>
JDA	User Fees/Grants
Loganville	User Fees/Grants
Monroe	User Fees/Grants
Jersey	User Fees/Grants
Social Circle	User Fees/Grants
Walton County	User Fees/Grants

4. How will the strategy change the previous arrangements for providing and/or funding this service within the county?

The Joint Development Authority of Jasper, Morgan, Newton and Walton Counties ("JDA") may determine the service provider within Stanton Springs and Stanton Springs North.

5. List any formal service delivery agreements or intergovernmental contracts that will be used to implement the strategy for this service:

<i>Agreement Name</i>	<i>Contracting Parties</i>	<i>Effective and Ending Dates</i>
Master Service Delivery Agree	Walton County/Between/Good Hope/Jersey/Loganville Monroe/Social Circle/Walnut Grove	July 2019 - July 2029
IGA re Sewer Service	JDA, Walton Co, Newton Co, Morgan Co, Jasper Co, and, Social Circle	7/23/2002 - 7/23/2052
IGA re Stanton Springs North	JDA and Social Circle	April 2021 - April 2071

6. What other mechanisms (if any) will be used to implement the strategy for this service (e.g., ordinances, resolutions, local acts of the General Assembly, rate or fee changes, etc.), and when will they take effect?

None.

7. Person completing form: **Andrea Gray, Attorney for Joint Development Authority of Jasper, Morgan, Newton & Walton Counties**

Phone number: **770-235-1083**      Date completed: 10/4/2021

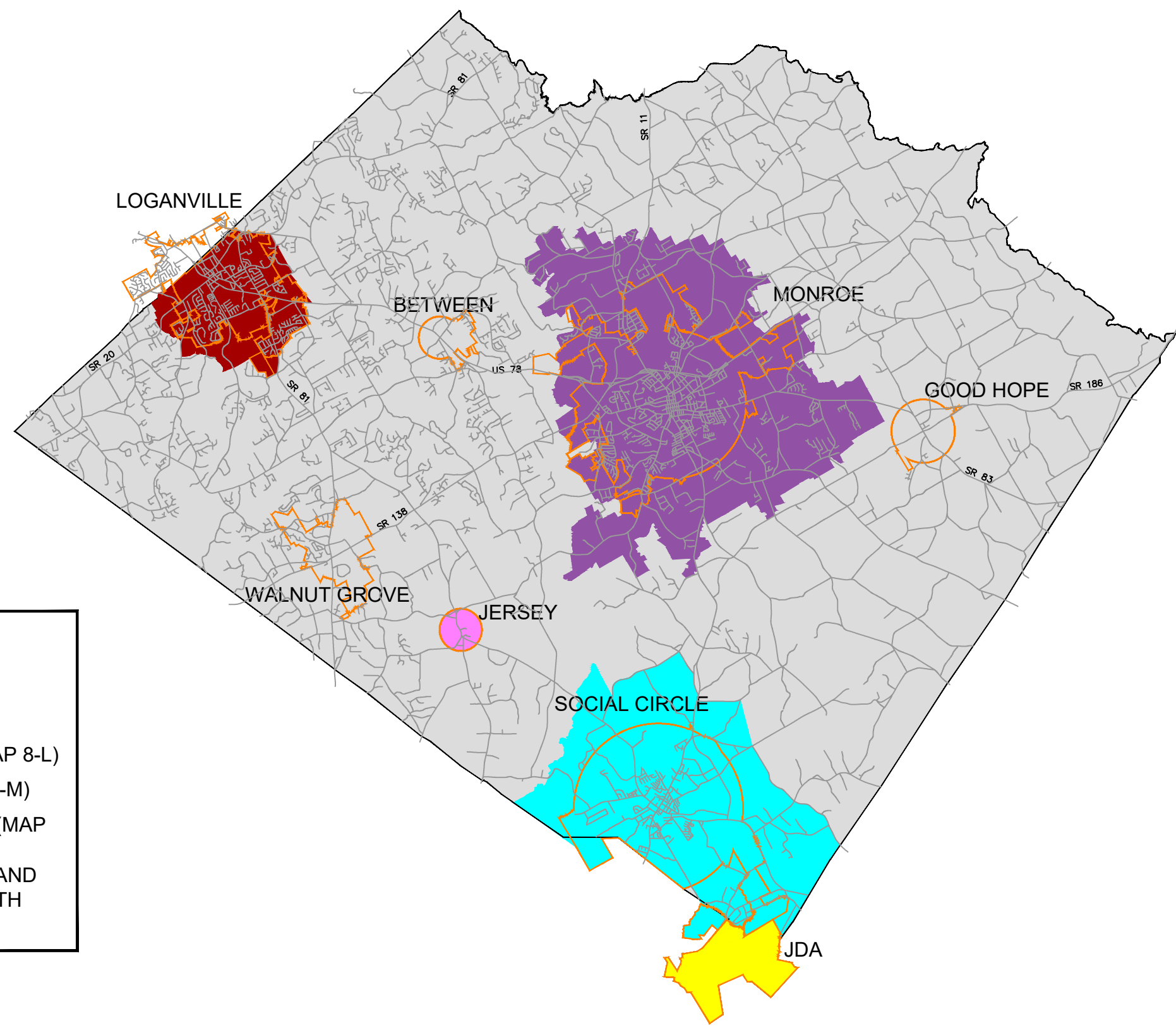
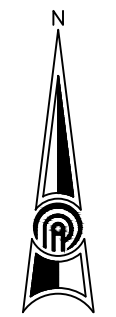
8. Is this the person who should be contacted by state agencies when evaluating whether proposed local government projects are consistent with the service delivery strategy?  Yes  No

If not, provide designated contact person(s) and phone number(s) below:

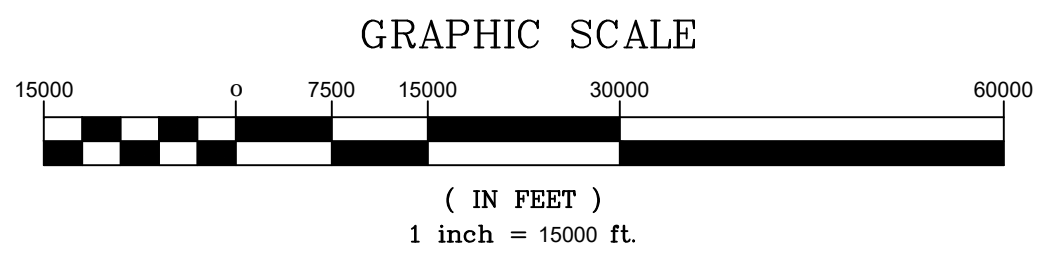
**WALTON COUNTY - DAVID THOMPSON, CHAIRMAN 770-267-1301**  
**CITY OF BETWEEN - ROBERT POST, MAYOR, 770-366 -1240**  
**CITY OF GOOD HOPE - RANDY GARRETT, MAYOR, (678) 986-0441**  
**CITY OF JERSEY - RONNIE THOMPSON, MAYOR, (770) 464-3652**  
**CITY OF LOGANVILLE - DANNY ROBERTS, CITY MANAGER, 770-466-1165**  
**CITY OF MONROE - LOGAN PROPES, CITY MANAGER, 770-267-3429**

**CITY OF SOCIAL CIRCLE - CITY MANAGER - 770-464-6901**  
**CITY OF WALNUT GROVE - MARK MOORE, MAYOR (770) 787-0046**  
**JOINT DEVELOPMENT AUTHORITY OF JASPER, MORGAN, NEWTON AND WALTON COUNTIES - ANDREA GRAY,**  
**ATTORNEY, 770-235-1083**





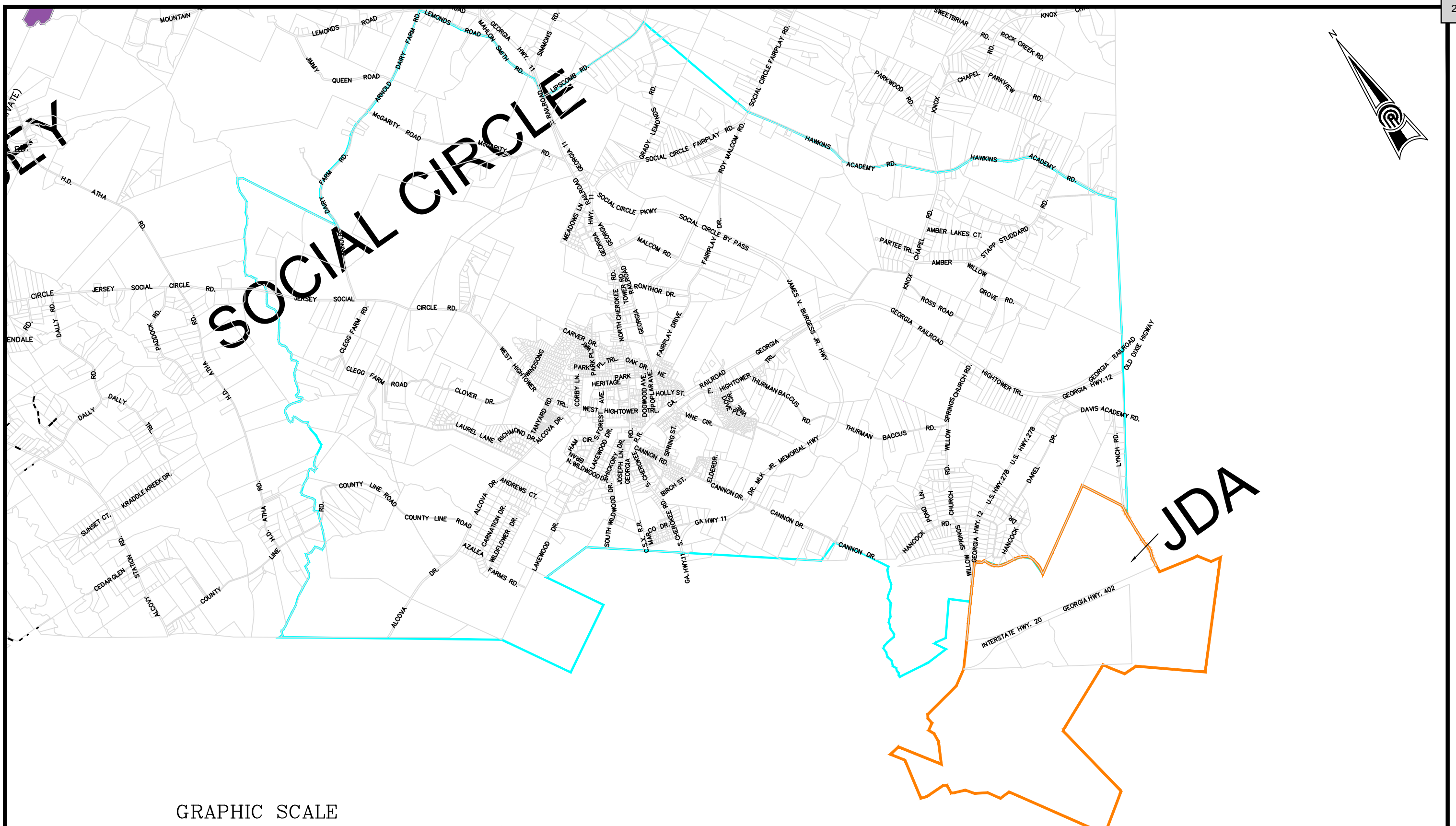
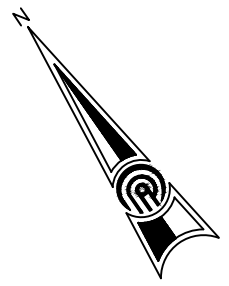
- CITY LIMITS
- WALTON COUNTY
- CITY OF JERSEY
- CITY OF LOGANVILLE (MAP 8-L)
- CITY OF MONROE (MAP 8-M)
- CITY OF SOCIAL CIRCLE (MAP 8-SC)
- JDA STANTON SPRINGS AND STANTON SPRINGS NORTH (NCWSA WATER)



**PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

**WALTON COUNTY  
WATER SERVICE AREAS**

SERVICE DELIVERY STRATEGY		
Land lot:	District:	Date: SEPT 2021
County: WALTON		<b>8</b>
Drawn By: SS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	



GRAPHIC SCALE



( IN FEET )  
1 inch = 4000 ft.

- CITY LIMITS
- WATER SERVICE AREA

**PRECISION**  
Planning Inc.  
planners • engineers • architects • surveyors  
400 Pike Boulevard, Lawrenceville, Ga 30046  
770.338.8000 • www.ppi.us

CITY OF SOCIAL CIRCLE  
WATER SERVICE AREA

SERVICE AREA MAP

Land lot:	District:	Date: SEPT 2021
County: WALTON		8-SC
Drawn By: SS	Field By:	
Checked By: JP		
Job #: T03170L	Scale: NA	



**SERVICE DELIVERY STRATEGY**

**FORM 4: Certifications**

**Instructions:**

This form must, at a minimum, be signed by an authorized representative of the following governments: 1) the county; 2) the city serving as the county seat; 3) all cities having a 2010 population of over 9,000 residing within the county; and 4) no less than 50% of all other cities with a 2010 population of between 500 and 9,000 residing within the county. Cities with a 2010 population below 500 and local authorities providing services under the strategy are not required to sign this form, but are encouraged to do so.

**COUNTY: WALTON COUNTY**

We, the undersigned authorized representatives of the jurisdictions listed below, certify that:

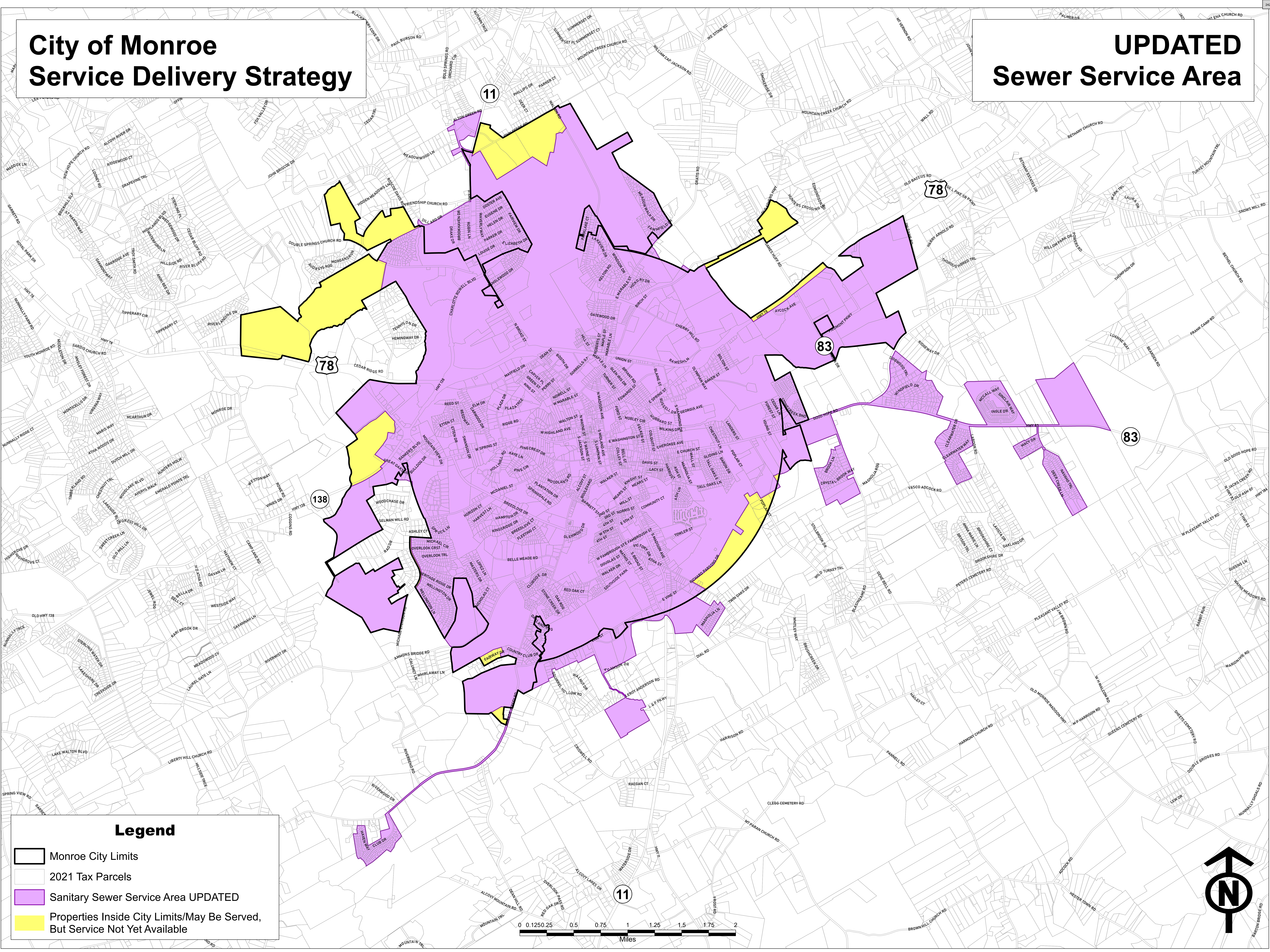
1. We have executed agreements for implementation of our service delivery strategy and the attached forms provide an accurate depiction of our agreed upon strategy (O.C.G.A 36-70-21);
2. Our service delivery strategy promotes the delivery of local government services in the most efficient, effective, and responsive manner (O.C.G.A. 36-70-24 (1));
3. Our service delivery strategy provides that water or sewer fees charged to customers located outside the geographic boundaries of a service provider are reasonable and are not arbitrarily higher than the fees charged to customers located within the geographic boundaries of the service provider (O.C.G.A. 36-70-24 (20); and
4. Our service delivery strategy ensures that the cost of any services the county government provides (including those jointly funded by the county and one or more municipalities) primarily for the benefit of the unincorporated area of the county are borne by the unincorporated area residents, individuals, and property owners who receive such service (O.C.G.A. 36-70-24 (3)).

JURISDICTION	TITLE	NAME	SIGNATURE	DATE
<u>WALTON COUNTY</u>	Chairman	David Thompson		
<u>CITY OF BETWEEN</u>	Mayor	Robert Post		
<u>CITY OF GOOD HOPE</u>	Mayor	Randy Garrett		
<u>CITY OF JERSEY</u>	Mayor	Ronnie Thompson		
<u>CITY OF LOGANVILLE</u>	Mayor	Ray Martinez		
<u>CITY OF MONROE</u>	Mayor	John Howard		
<u>CITY OF SOCIAL CIRCLE</u>	Mayor	David Keener		
<u>CITY OF WALNUT GROVE</u>	Mayor	Mark Moore		



# City of Monroe Service Delivery Strategy

# UPDATED Sewer Service Area



**Legend**

- Monroe City Limits
- 2021 Tax Parcels
- Sanitary Sewer Service Area UPDATED
- Properties Inside City Limits/May Be Served, But Service Not Yet Available

