

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

**February 15, 2021  
6:30 PM**

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### MISSION STATEMENT

THROUGH VISIONARY LEADERSHIP AND GOOD STEWARDSHIP, WE WILL ADMINISTER STATE REQUIREMENTS, ENSURE PUBLIC SAFETY, DETERMINE COUNTY NEEDS, AND PROVIDE SERVICES THAT CONTINUALLY ENHANCE QUALITY OF LIFE

### CALL TO ORDER BY THE CHAIRMAN

### PRESENTATION OF COLORS

### INVOCATION

#### **A. APPROVAL OR CORRECTIONS OF MINUTES**

1. Approval or Correction of Meeting Minutes Pg. 4

#### **B. APPROVAL OF THE AGENDA**

1. BOC - Changes to the Agenda Pg. 21

#### **C. RECOGNITIONS AND PRESENTATIONS**

1. County Manager - Procurement Month Proclamation Pg. 23
2. DHS - Social Worker Appreciation Month Pg. 25

#### **D. INFORMAL PUBLIC COMMENTS**

#### **E. OLD BUSINESS**

#### **F. CONSENT AGENDA**

*(Items listed under consent are generally of a routine nature. The Board may take action to approve/disapprove all items in a single vote. Any item may be withheld from a general action, to be discussed and voted upon separately at the discretion of the Board.)*

1. Active Living and Parks - Lease for Cox Mill School Park Property to City of Concord Pg.27
2. Active Living and Parks - Sale of Fixed Asset Budget Amendment Pg. 35

3. Appointments - Firemen's Relief Fund Trustees Pg. 38
4. Appointments - Juvenile Crime Prevention Council Pg. 41
5. Appointments and Removals - Early Childhood Task Force Advisory Board Pg. 48
6. Appointments and Removals - Industrial Facilities and Pollution Control Financing Authority Pg. 53
7. Appointments and Removals - Mental Health Advisory Board Pg. 57
8. County Manager - Central Area Plan Inter-local Agreement Modification Pg. 63
9. County Manager - Child Care Facility Partnership Pg. 68
10. County Manager - Purchase of Property for the Northeast Cabarrus Public Safety Communications Towers Pg. 71
11. County Manager - Utility Easements at Roberta Road Middle School Pg. 86
12. Planning and Development - 2020-2021 HOME Program Budget Amendment and Project Ordinance Pg. 92
13. Property and Liability Internal Service Fund - Move Funds from Property and Liability Insurance Internal Service Fund to the General Fund Pg. 98
14. Tax Administration - Advertisement of 2020 Delinquent Taxes Pg. 101
15. Tax Administration - Refund and Release Reports - January 2021 Pg. 105
16. Tax Administration - Waiver of Occupancy Tax Penalty Pg. 117

**G. NEW BUSINESS**

1. Planning and Development - Community Development Programs for 2021-2022 - Public Hearing 6:30 p.m. Pg. 121
2. LME-MCO Realignment Written Request Pg. 125
3. Planning and Development - Weatherization Cares Contract and Associated Budget Amendment Pg. 139

**H. REPORTS**

1. BOC - Receive Updates From Commission Members who Serve as Liaisons to Municipalities or on Various Boards/Committees Pg. 178
2. BOC - Request for Applications for County Boards/Committees Pg. 179
3. Budget - Monthly Financial Update Pg. 193
4. Cabarrus County Tourism Authority FY2020 Year End Financials Pg. 198
5. County Manager - Monthly Building Activity Reports Pg. 258
6. County Manager - Monthly New Development Report Pg. 262
7. EDC - January 2020 Monthly Summary Report Pg. 270

**I. GENERAL COMMENTS BY BOARD MEMBERS**

**J. WATER AND SEWER DISTRICT OF CABARRUS COUNTY**

**K. CLOSED SESSION**

1. Closed Session - Pending Litigation and Economic Development Pg. 272

**L. ADJOURN**

## Scheduled Meetings

February 26	Board Retreat	4:00 p.m.	Virtual
February 27	Board Retreat	8:00 a.m.	Virtual
March 1	Work Session	4:00 p.m.	Multipurpose Room
March 15	Regular Meeting	6:30 p.m.	BOC Meeting Room
April 6	Work Session	4:00 p.m.	Multipurpose Room
April 19	Regular Meeting	6:30 p.m.	BOC Meeting Room
April 21	Cabarrus Summit	6:00 p.m.	Cabarrus Arena

**Mission:** Through visionary leadership and good stewardship, we will administer state requirements, ensure public safety, determine county needs, and provide services that continually enhance quality of life.

**Vision:** Our vision for Cabarrus is a county where our children learn, our citizens participate, our dreams matter, our families and neighbors thrive, and our community prospers.

### Cabarrus County Television Broadcast Schedule Cabarrus County Board of Commissioners' Meetings

The most recent Commissioners' meeting is broadcast at the following days and times. Agenda work sessions begin airing after the 1st Monday of the month and are broadcast for two weeks up until the regular meeting. Then the regular meeting begins airing live the 3rd Monday of each month and is broadcast up until the next agenda work session.

<b>Sunday - Saturday</b>	<b>1:00 P.M.</b>
<b>Sunday - Tuesday</b>	<b>6:30 P.M.</b>
<b>Thursday &amp; Friday</b>	<b>6:30 P.M.</b>

In accordance with ADA regulations, anyone who needs an accommodation to participate in the meeting should notify the ADA Coordinator at 704-920-2100 at least forty-eight (48) hours prior to the meeting.

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Approval or Correction of Minutes

**SUBJECT:**

Approval or Correction of Meeting Minutes

**BRIEF SUMMARY:**

The following meeting minutes are provided for correction or approval:

January 4, 2021 (Work Session)

January 19, 2021 (Regular Meeting)

**REQUESTED ACTION:**

Motion to approve the aforementioned meeting minutes as presented.

**EXPECTED LENGTH OF PRESENTATION:**

1 Minute

**SUBMITTED BY:**

Lauren Linker, Clerk to the Board

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- ▣ 1-4-21 Work Session
- ▣ 1-19-21 Regular

The Board of Commissioners for the County of Cabarrus conducted a remote virtual meeting, as allowed by the Board's Remote Participation Policy during the Covid-19 state of emergency, for an Agenda Work Session for Cabarrus County in Concord, North Carolina at 4:00 p.m. on Monday, January 4, 2021.

Public access to the meeting could be obtained through the following means:

live broadcast at 4:00 p.m. on Channel 22  
<https://www.youtube.com/cabarruscounty>  
<https://www.cabarruscounty.us/cabcotv>  
 (704) 920-2023, Pin 1234

Present - Chairman:	Stephen M. Morris
Vice Chairman:	Diane R. Honeycutt
Commissioners:	F. Blake Kiger
	Lynn W. Shue
	Barbara C. Strang

Also present were Mike Downs, County Manager; Richard M. Koch, County Attorney; Jonathan Marshall, Deputy County Manager; Rodney Harris, Deputy County Manager; Kyle Bilafer, Area Manager of Operations; Debbie Brannan, Area Manager of Innovation and Technology; and Lauren Linker, Clerk to the Board.

**1. Call to Order**

Chairman Morris called the meeting to order at 4:02 p.m.

**2. Approval of Agenda**

Chairman Morris presented the following changes to the agenda:

Additions:

Discussion Items - No Action

3.1 Cabarrus County Schools - 2020-21 NC Department of Public Instruction Facility Needs Survey

Supplemental Information:

Discussion Items for Action

4.5 County Manager - Request for Easements from the Water & Sewer Authority of Cabarrus County (WSACC)

- Supplemental Map

Removed:

Discussion Items - No Action

3.2 EDC - Cannon Foundation Grant

**UPON MOTION** of Vice Chairman Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved the agenda as amended by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

**3. Discussion Items - No Action**

**3.1 Cabarrus County Schools - 2020-21 North Carolina Department of Public Instruction Facility Needs Survey**

Brian Cone, Cabarrus County Schools (CCS), Director of Architecture, Planning and Construction presented a PowerPoint presentation in connection with the 2020-21 North Carolina Department of Public Instruction (NCDPI) Facility Needs Survey. The following information was presented:

- What is the '2020 NCDPI Facility Needs Survey'
- What is included in the survey
  - o Capacity Summary for 0-5 years at each facility
  - o Capacity Summary for 6-10 years at each facility
  - o Renovation and capital cost summary for 0-5 years
  - o Renovation and capital cost summary for 6-10 years
  - o 2019 - 2020 Average Daily Membership (ADM) at each facility
  - o Project ADM by year and grade through 2029-2030
  - o Certifications by LEA's Board of Education and Board of County Commissioners
- How the 2020 NCDPI Facility Needs Survey is created

Tim Lowder, Cabarrus County Schools (CCS), Executive Director of Operations, reported as part of the report, the Board of Commissioners are

required to sign off confirming receipt and review of the report. Mr. Lowder requested confirmation from the Board.

A discussion ensued. During discussion, Mr. Cone responded to questions from the Board. By consensus, the Board agreed to sign off, acknowledging receipt of the survey.

### **3.2 Innovation and Technology - Innovation Report**

Debbie Brannan, Area Manager of Innovation and Technology, presented the Innovation Report for January 2021. Topics presented were as follows:

- This month's book for the employees' digital book club, *Superpower*, explores seven principals to help solve problems faster, make better decisions and improve our professional and personal lives
- County Strategic Plan - Five Strategic Initiatives
  - Transparent and Accountable Government
  - Healthy and Safe Community
  - Thriving Economy
  - Sustainable Growth and Development
  - Culture and Recreation
- Creation and implementation of the Symptom Checker application in connection with Covid-19
  - Addition of an exposure question
  - Exposure Form as needed
- Symptom Checker Dashboard report

## **4. Discussion Items for Action**

### **4.1 Salisbury-Rowan Community Action Agency, Inc. Presentation of FY 2021-22 Application for Funding**

Sherry Tillmon, Salisbury-Rowan Community Action Agency, Director of Family Services, presented a PowerPoint presentation regarding the FY2021-22 Application for Funding for the Community Services Block Grant (CSBG). The presentation included the following topics:

- The Community Services Block Grant (CSBG) History
- Program Year 2021-2022 Total Funding Allocation \$518,327
- Self-Sufficiency Program
- Projected Outcome Targets
- 2019-2020 Community Impact
- Office Locations

A brief discussion ensued. During discussion, Ms. Tillmon responded to questions from the Board.

### **4.2. BOC - Appointments to Boards and Committees**

Chairman Morris reported information regarding appointments to the Cabarrus County Youth Commission and Active Living and Parks Commission have been provided. He advised this item would be included in the Consent section of the January 19, 2021 regular meeting agenda.

### **4.3. Active Living and Parks - Soccer Complex Recognition Recommendation**

Londa Strong, Active Living and Parks Director, reported Kevin Crutchfield presented a proposal to the Active Living and Parks Commission at the November 19, 2020 meeting to name two of the fields after individuals that were instrumental in making the Soccer Complex at Frank Liske Park become a reality.

Kevin Crutchfield, member of the Active Living and Parks Commission, presented a proposal to the Board to erect a plaque recognizing Bill Jermyn and Steve Little for their efforts to acquire and lease additional lands to build the Soccer Complex at Frank Liske Park.

A brief discussion ensued. During discussion, Commissioner Kiger expressed support for the recognition recommendation.

### **4.4. County Manager - Ad Hoc Amendment to the Central Area Plan Interlocal Agreement**

Jonathan Marshall, Deputy County Manager, presented a request for an Ad Hoc Amendment to the Interlocal Agreement with the City of Concord in connection

with the Central Area Land Use Plan. Currently, the plan limits the extension of public utilities in specified areas. The amendment to the Interlocal Agreement would permit a public water connection for a specified property within part of the restricted area. Staff supports this amendment.

#### **4.5. County Manager - Request for Easements from the Water and Sewer Authority of Cabarrus County (WSACC)**

Jonathan Marshall, Deputy County Manager, reported the Water and Sewer Authority of Cabarrus County (WSACC) has requested temporary construction easements on County owned property to allow construction of a sewer line along Back Creek. One parcel is located off Hickory Ridge Road at Back Creek and the other off Stallings Road. The County is being offered \$500 and \$2069 respectively for the easements.

#### **4.6. County Manager - Tree and Brush Removal at Stonewall Jackson Property**

Jonathan Marshall, Deputy County Manager, reported boundary and survey work at the Stonewall Jackson property is almost complete. County and State Historic Properties staff have been discussing removal of trees and brush around example structures on the Stonewall Jackson property. The purpose of this work would be to allow better inspection of those areas, to generate interest in the proposed restoration project, safety, and security purposes.

The County Grounds Maintenance Division received a proposal from Carolina Tree Care (the County's regular contracted vendor for tree removal) for the work. The proposal includes removal of trees and brush from around the Daughter's Cottage, the Chapel, and the footbridge over Old Charlotte Road. The proposed cost of \$47,500 is due to the extensive and difficult work needed, particularly to the areas directly adjacent to the buildings and Old Charlotte Road.

Mr. Marshall advised all costs are being tracked as survey costs will be reimbursed by the State and certain other costs will be reimbursed at the time of the sale of property.

Additionally, Mr. Marshall advised an assessment of the natural heritage sites for plant species and stone outcroppings was performed. The State report recommends the inclusion of those areas in the sale of the property as it is not suited for development. Currently all buildings on the original site have been condemned. County staff will further assess those structures to see if the buildings can be made safe to enter under certain conditions. This would allow inspections to prospective buyers and interested parties.

A discussion ensued. During discussion, Mr. Marshall responded to questions from the Board.

#### **4.7. Planning and Development - Proposed Amendment to Construction Standards Fee Schedule**

Todd Culp, Chief Codes Enforcement Officer, reported after using the new fee schedule for a year, staff has identified a few items that need clarification and/or revising. The changes include fees for storage sheds, structural repairs and data and low voltage.

#### **4.8. Planning and Development Department - TEXT2020-00001- Proposed Amendments to the Cabarrus County Zoning Ordinance**

Susie Morris, Planning and Zoning Manager, reported legislation was passed by the North Carolina General Assembly in 2020 that combined city and county planning and zoning regulations into a new chapter of the North Carolina General Statutes called 160D. The intent of the legislation was to update and streamline the laws related to development, to include plain language and to provide one central location for statutory requirements. Due to the statutory changes and the dissolution of 153A, which previously outlined county planning and zoning regulations, amendments to the Cabarrus County Development Ordinance are needed. The original deadline for local governments to implement the statutory changes in 160D was January 1, 2021. However, the legislation was amended in July of 2020, which extended the implementation date to July 1, 2021 due to the pandemic, but also made 160D effective immediately. Therefore, Cabarrus County needs to proceed with the Ordinance amendment.

There are several chapters impacted by the legislation. Additionally, there are a few general updates, change in verbiage and some typos that will need to be corrected. A brief description of the proposed changes was provided

for each chapter being amended along with the proposed changes to the CCDO for the Board's consideration. A public hearing is required.

### 5. Approval of Regular Meeting Agenda

The Board discussed the placement of the items on the agenda.

**UPON MOTION** of Commissioner Shue, seconded by Commissioner Strang and unanimously carried, the Board approved the agenda as follows and scheduled the required public hearing for the January 19, 2021 regular meeting, by the following vote: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

#### Approval or Correction of Minutes

- Approval or Correction of Minutes

#### Recognitions and Presentations

- Human Resources - Recognition of Emergency Management Director Robert "Bobby" Smith's Retirement
- Proclamation - Black History Month

#### Consent

- Active Living and Parks - Soccer Complex Recognition Recommendation
- Appointments - Active Living and Parks Commission
- Appointments - Cabarrus County Youth Commission
- County Manager - Ad Hoc Amendment to the Central Area Plan Interlocal Agreement
- County Manager - Tree and Brush Removal at Stonewall Jackson Property
- County Manager - Request for Easements from the Water & Sewer Authority of Cabarrus County (WSACC)
- Planning and Development - Proposed Amendment to Construction Standards Fee Schedule
- Salisbury-Rowan Community Action Agency, Inc. Presentation of FY 2021-22 Application for Funding
- Tax Administration - Refund and Release Reports - December 2020

#### New Business

- Finance - Presentation of the Fiscal Year 2020 Comprehensive Annual Financial Report
- Planning and Development Department - TEXT2020-00001- Proposed Amendments to the Cabarrus County Zoning Ordinance - Public Hearing 6:30 p.m.

#### Reports

- BOC - Receive Updates From Commission Members Who Serve as Liaisons to Municipalities or on Various Boards/Committees
- BOC - Request for Applications for County Boards/Committees
- County Manager - Monthly Building Activity Reports
- County Manager - Monthly New Development Report
- EDC - December 2020 Monthly Summary Report
- Finance - Monthly Financial Update

### 6. Adjourn

**UPON MOTION** of Commissioner Shue, seconded by Commissioner Strang and unanimously carried, the meeting adjourned at 5:10 p.m. by the following vote: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

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Lauren Linker, Clerk to the Board

The Board of Commissioners for the County of Cabarrus met in regular session through a remote virtual meeting as allowed by the Board's Remote Participation Policy, during the Covid-19 state of emergency in Concord, North Carolina at 6:30 p.m. on Tuesday, January 19, 2021.

Public access to the meeting could be obtained through the following means:

In presence in the Board of Commissioners Chambers  
Live broadcast at 6:30 p.m. on Channel 22  
<https://www.youtube.com/cabarruscounty>  
<https://www.cabarruscounty.us/cabcotv>  
(704) 920-2023, Pin 1234  
E-mail: [publiccomment@cabarruscounty.us](mailto:publiccomment@cabarruscounty.us)

Present - Chairman: Stephen M. Morris  
Vice Chairman: Diane R. Honeycutt  
Commissioners: F. Blake Kiger  
Lynn W. Shue  
Barbara C. Strang

Also present were Mike Downs, County Manager; Richard M. Koch, County Attorney; Jonathan Marshall, Deputy County Manager; Rodney Harris, Deputy County Manager; Debbie Brannan, Area Manager of Innovation and Technology; and Lauren Linker, Clerk to the Board.

Chairman Morris called the meeting to order at 6:30 p.m.

Chairman Morris provided information on the meeting format and the process for the public to participate in informal public comments and the public hearing.

**(A) APPROVAL OR CORRECTION OF MINUTES**

**UPON MOTION** of Commissioner Strang, seconded by Vice Chairman Honeycutt and unanimously carried, the Board approved the minutes of December 7, 2020 (Organizational Meeting), December 7, 2020 (Work Session), and December 21, 2020 (Regular Meeting) as presented by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

**(B) APPROVAL OF THE AGENDA**

Chairman Morris reviewed the following changes to the agenda.

Additions:

Recognitions and Presentations

C-1 BOC - Recognition of Former Commissioner Elizabeth "Liz" Poole

C-2 Human Resources - Recognition of Cheryl Harris on Her Retirement from the Cabarrus County Department of Human Services

New Business

G-3 Kannapolis City Schools - 2020-21 NC Department of Public Instruction Facility Needs Survey

Removals:

New Business

DHS - Mental Health Services - Public Hearing 6:30 p.m.

- It was determined a public hearing is not needed

**UPON MOTION** of Commissioner Kiger, seconded by Commissioner Shue and unanimously carried, the Board approved the agenda as amended by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

**(C) RECOGNITIONS AND PRESENTATIONS**

**(C-1) BOC - Recognition of Former Commissioner Elizabeth "Liz" Poole**

Mike Downs, County Manager, recognized former County Commissioner Liz Poole for her many years of service to Cabarrus County. Mr. Downs shared highlights of her work through and in the various roles in the community.

Chairman Morris expressed appreciation for Commissioner Poole's many years of service and continued volunteerism in the community.

Commissioner Kiger commented on Commissioner Poole's leadership and expressed appreciation for her dedicated service.

Vice Chairman Honeycutt spoke of Commissioner Poole's dedication throughout the years.

Commissioner Strang thanked Commissioner Poole for her years of service and wished her well in future endeavors.

Commissioner Shue expressed appreciation for Commissioner Poole's dedication and friendship throughout the years.

**(C-2) Human Resources - Recognition of Cheryl Harris on Her Retirement from the Cabarrus County Department of Human Services**

Karen Calhoun, Department of Human Services Director, recognized Cheryl Harris on her retirement from the Cabarrus County Department of Human Services. Ms. Calhoun shared highlights of Ms. Harris' career.

Ms. Harris expressed appreciation.

Chairman Morris provided additional comments and wished Ms. Harris well.

Vice Chairman Honeycutt commended Ms. Harris for her service and expressed well wishes.

**(C-3) Human Resources - Recognition of Emergency Management Director Robert "Bobby" Smith's Retirement**

Jonathan Marshall, Deputy County Manager, recognized Bobby Smith on his retirement from Cabarrus County Emergency Management. Mr. Marshall reviewed Mr. Smith's accomplishments throughout his career. Mr. Marshall advised that Mr. Smith was on the road and was unable to be in attendance.

Chairman Morris thanked Mr. Smith for his years of dedicated service to the citizens of Cabarrus County.

Vice Chairman Honeycutt commented on Mr. Smith's service and wished him well in his retirement.

Commissioner Shue experienced technical difficulties and was absent for a portion of the meeting.

**(C-4) Proclamation - Black History Month**

Chairman Morris read the proclamation aloud.

**UPON MOTION** of Vice Chairman Honeycutt, seconded by Commissioner Kiger and unanimously carried, the Board adopted the proclamation by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

Proclamation No. 2021-01

**BLACK HISTORY MONTH PROCLAMATION**

WHEREAS, Black History Month is the observance of a special period to recognize the achievements and contributions of African-Americans to our county, state and nation; and

WHEREAS, this observance presents the special opportunity to become more knowledgeable about black heritage, and to honor the many black leaders who have played a part in the progress of our county; and

WHEREAS, such knowledge can strengthen the insight of all our citizens regarding the issues of human rights, the great strides that have been made in the crusade to eliminate the barriers of equality for minority groups, and the continuing struggle against racial discrimination and poverty; and

WHEREAS, as a result of their determination, hard work, intelligence, and perseverance, African-Americans have achieved exceptional success in all aspects of society including business, education, politics, science, athletics and the arts; and

NOW, THEREFORE, BE IT PROCLAIMED that the Board of Commissioners for Cabarrus County, North Carolina, do hereby recognize February 2021 as Black History Month and encourage all citizens to participate in the educational and celebratory events honoring the contributions and accomplishments of African-Americans.

ADOPTED this 19<sup>th</sup> day of January, 2021.

/s/ Stephen M. Morris  
 Stephen M. Morris, Chairman  
 Cabarrus County Board of Commissioners

**(D) INFORMAL COMMENTS**

Chairman Morris provided information on the process for the public to participate in informal public comments.

Chairman Morris opened the meeting for Informal Public Comments at 6:59 p.m. He asked Lauren Linker, Clerk to the Board, if any written comments had been submitted, if anyone was waiting on the phone or present in the Board of Commissioners Chambers to present a comment.

Ms. Linker stated no written comments were submitted and there was no one on the phone or present in the Board of Commissioners Chambers.

There were no comments, nor anyone present via telephone or in person to address the Board; therefore, Chairman Morris closed that portion of the meeting.

**(E) OLD BUSINESS**

None.

**(F) CONSENT**

**(F-1) Active Living and Parks - Soccer Complex Recognition Recommendation**

Kevin Crutchfield presented a Proposal to the Active Living and Parks (ALP) Commission at the November 19th meeting. He has proposed to name two of the fields after individuals that were instrumental in making the Soccer Complex at Frank Liske Park become a reality.

Bill Jermyn was the President of the Cabarrus Soccer Association at the time the County was trying to acquire the additional acreage. He worked tirelessly to help acquire the adjoining land to build the Soccer Complex. Steve Little was the Director of the Department at the time and was instrumental in acquiring an additional lease on the property for the Soccer Complex. Additionally, Steve was in charge of the development of the project with architectural drawings, bids and construction.

After discussion, the ALP Commission voted unanimously to make the recommendation of placing a plaque on the Concession Building honoring these two instead of naming the fields.

Mr. Crutchfield indicated he would purchase and install the plaque. The ALP Commission will approve the language on the plaque. Infrastructure and Asset Management will be involved in the installation of the plaque.

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried the Board voted to allow Mr. Crutchfield to purchase a plaque to honor Mr. Jermyn and Mr. Little with ALP Commission approving the language on the plaque and IAM involved in the installation by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

**(F-2) Appointments - Active Living and Parks Commission**

Charles Grimsley's current term as an Active Living and Parks Commission member expires January 2021. Mr. Grimsley is eligible for a second, three-year term and has agreed to be reappointed to a term ending January 2024.

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board reappointed Charles Grimsley to the Active Living and Parks Commission for a three-year term ending January 31, 2024 by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

**(F-3) Appointments - Cabarrus County Youth Commission**

The Cabarrus County Youth Commission recommends the appointment of Tizita Henderson for a two-year term ending June 30, 2022. Tizita is a student at Hickory Ridge High School. A letter in that regard was included in the agenda.

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board appointed Tizita Henderson to the Cabarrus County Youth Commission as a Hickory Ridge High School representative for a two-year term ending June 30, 2022 by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

**(F-4) County Manager - Ad Hoc Amendment to the Central Area Plan Interlocal Agreement**

The Board of Commissioners adopted the Central Area Land Use Plan as did the City of Concord. That plan limits the extension of public utilities in specified areas. The attached Ad Hoc Amendment to the Interlocal Agreement would permit a public water connection for a specified property within part of the restricted area. Staff supports this amendment.

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board approved the Ad Hoc Amendment to the Central Area Plan Interlocal Agreement for a parcel at 2925 Twinfield Drive by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

**(F-5) County Manager - Tree and Brush Removal at Stonewall Jackson Property**

County and State Historic Properties staff have been discussing removal of trees and brush around example structures on the Stonewall Jackson property. The purpose of this work would be to allow better inspection of those areas, to generate interest in the proposed restoration project and for security purposes.

The County Grounds Maintenance Division received a proposal from Carolina Tree Care (the County's regular contracted vendor for tree removal) for this work. That proposal includes removal of trees and brush from around the Daughter's Cottage, the Chapel and the footbridge over Old Charlotte Road. The proposed cost is \$47,500 due to the extensive and difficult work that must be performed particularly with regard to the areas directly adjacent to the buildings and Old Charlotte Road.

Kyle Bilafer has identified money left over from some completed capital projects for this work. We would propose moving that money to the Stonewall Jackson project ordinance so that it may be tracked for possible reimbursement upon sale of the property.

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board approved the proposal from Carolina Tree Care for tree and brush removal at Stonewall Jackson and approved the budget amendment by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

Date:  Amount:   
 Dept. Head:  Department:   
 Internal Transfer Within Department       Transfer Between Departments/Funds       Supplemental Request

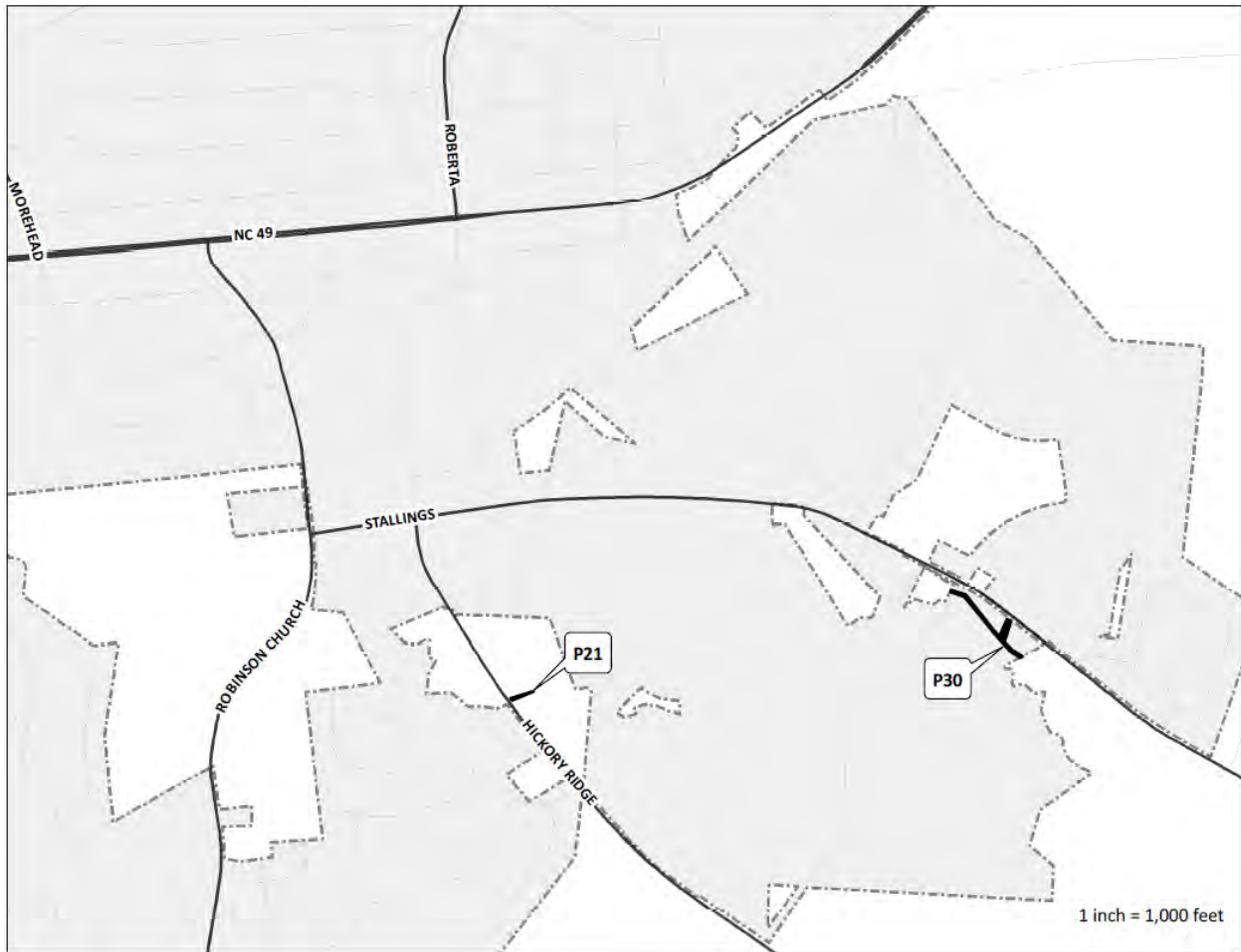
This budget amendment moves funds from an unallocated account to create a new project for tree removal on Stonewall Jackson property.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
380	6	0000-6921-UNAL	Unallocated Funds Cont'b from CRF	147,000.00		47,500.00	99,500.00
380	9	0000-9830-UNAL	Other Improvements	147,000.00		47,500.00	99,500.00
380	6	1940-6921-STONE	Contribution from CRF		47,500.00		47,500.00
380	9	1940-9830-STONE	Other Improvements		47,500.00		47,500.00

**(F-6) County Manager - Request for Easements from the Water and Sewer Authority of Cabarrus County (WSACC)**

WSACC (Water and Sewer Authority of Cabarrus County) has requested temporary construction easements on County owned property to allow for the construction of the Back Creek parallel interceptor sewer line. One parcel is

located off Hickory Ridge Road at Back Creek (parcel 21 on the attachments) and the other off Stallings Road (parcel 30 on the attachments). They are offering \$500 and \$2069 respectively for the easements.



**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board approved the temporary construction easement agreements with WSACC for the identified parcels off Hickory Ridge and Stallings Roads by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

**(F-7) Planning and Development - Proposed Amendment to Construction Standards Fee Schedule**

Cabarrus County adopted a completely new Construction Standards Fee Schedule effective in January 2020 that had a new framework than the previous schedule. After using the schedule for a year, staff has identified a few items that need clarification and/or revising.

**Storage Sheds:**

Storage Shed - First 150sf. (Max 400sf.) (single elect. circuit)

Current Fee:	\$246.17	recommend \$150.00
Storage Shed - each additional 100sf.	\$22.75	recommend \$ 25.00
		Max fee \$200.00

**Structural Repairs:**

Additional Fee	Structural Repair- single component	\$125.00
Existing Fee	Structural Repair- first 100sf.	\$250.00
Existing Fee	Structural Repair- each additional 100sf.	\$ 25.00

**Data and Low Voltage:**

Data Wiring (First 1000sf.)	Change from per 1000sf. To First 1000sf.	\$81.25
Data Wiring (each addition 1000sf.)	New Fee Title	\$10.00
Low voltage (First 1000sf.)	New Fee Title	\$81.25
Low Voltage (each additional 1000sf.)	New Fee Title	\$10.00

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board approved revisions to the Construction Standards Fee Schedule by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

**(F-8) Salisbury-Rowan Community Action Agency, Inc. Presentation of FY 2021-22 Application for Funding**

Representatives from the Salisbury-Rowan Community Action Agency, Inc. (SRCCA) presented their FY 2021-22 Application for Funding at the work session. This agency provides services for economically disadvantaged citizens in Cabarrus and Rowan counties.

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board acknowledged receipt of the SRCCA's FY 2021-22 Community Services Block Grant funding application by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue.

**(F-9) Tax Administration - Refund and Release Reports - December 2020**

The Release Report contains taxpayers' names, bill numbers, valuations, tax amounts, along with the justifications for releasing the valuation/tax amounts for outstanding levies in accordance with N.C.G.S. 105-381. The Refund Report is a summary sheet which lists data from each refund request form, along with the justification for the refunds to the taxpayers in accordance with N.C.G.S. 105-381.

Note: Due to the transition of motor vehicles onto the new North Carolina Vehicle Tax System (NCVTS), motor vehicle-related refunds and releases will begin to be displayed on the new report generated by NCVTS.

**UPON MOTION** of Commissioner Strang, seconded by Commissioner Kiger and unanimously carried, the Board approved the December 2020 Refund and Release Reports as submitted, including the NCVTS Refund Report, and granted authority to the Tax Collector to process the refunds and releases by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger and Strang. Nays: None. Absent: Commissioner Shue. The report is hereby incorporated into the minutes by reference and is on file with the Clerk to the Board.

**(G) NEW BUSINESS****(G-1) Finance - Presentation of the Fiscal Year 2020 Comprehensive Annual Financial Report**

Wendi Heglar, Finance Director, announced, upon Board approval, the Fiscal Year 2020 Comprehensive Annual Financial Report (CAFR) will be available to the public on the County's website ([www.cabarruscounty.us](http://www.cabarruscounty.us)). She expressed appreciation to Susan Fearrington, the Finance and County Manager's office staff for their efforts throughout the audit process. She then presented an overview of the CAFR process. Ms. Heglar reported the Government Finance Officers Association (GFOA) of the United States and Canada awarded a Certificate of Achievement for Excellence in Financial Reporting to Cabarrus County for its Comprehensive Annual Financial Report for the fiscal year ended June 30, 2019. This was the thirty-fifth consecutive year that Cabarrus County has received this prestigious award.

Matt Braswell, Martin Starnes and Associates, Senior Manager, presented a PowerPoint Presentation that included the following information:

- Audit Summary
  - Unmodified opinion on the financial statements
  - No financial statement findings
  - No single audit findings
  - Unmodified opinion on Federal and State Awards

Ms. Heglar the presented the following FY 2020 Fund Balance Recap:

FY20 Total Revenues over Expenditures were \$9,738,639. Revenues were \$7,390,097 over amended budget amounts and Expenditures were \$10,713,120 under amended budget amounts.

For FY 20:

-The biggest areas where Revenues were over budgeted amounts were in the areas of Property Tax (\$1,991,130), Intergovernmental Revenues (\$2,256,764) and Permits and Fees (\$1,363,265).

-Property tax collection rate decreased slightly from prior year of 99.3% to 98.7%. There were increases in total Ad Valorem values due

to new construction and real estate improvements. Valuation at 6-30-19 was \$23,108,571,747 and at 6-30-20 was \$24,184,407,104.

-Local Option Sales tax increased 2.4% (\$51,750,608 to \$52,970,080). Of course, everything is affected by COVID-19. The County was fortunate to see an increase in sales tax when other counties and municipalities saw a decrease in sales tax during the year. The FY20 increase is also attributed to increased collection of online purchases.

-Expenditures were under budget by \$10,713,120. Some of the underspending or \$1,511,064 related to expenditures that were re-appropriated into FY2021 for uncompleted projects. County departments were conservative in their spending resulting in an additional \$9,202,056 of savings. The largest areas of savings were in 1) County salary and fringe expenses of \$2,446,601 under budget, due to unfilled positions and turnover, 2) Human Services, \$2,229,295 under budget, due to reduced expenses in Administration, Transportation, Economic Family Support, Economic Services and Child Welfare, 3) Unearned economic incentives \$1,669,293, and 4) unused contingencies \$675,582.

The Fund Balance calculation of excess of 15% policy was approved by the Board in December.

A brief discussion ensued.

Debbie Brannan, Area Manager of Innovation and Technology, announced Commissioner Shue rejoined the meeting via conference call at 7:14 p.m. Commissioner Shue was in attendance for the remainder of the meeting and was able to rejoin the meeting via video in the Teams portal at 7:19 p.m.

**UPON MOTION** of Commissioner Kiger, seconded by Commissioner Strang and unanimously carried, the Board accepted the Fiscal Year 2020 Comprehensive Annual Financial Report as presented by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

**(G-2) Planning and Development Department - TEXT2020-00001 - Proposed Amendments to the Cabarrus County Zoning Ordinance - Public Hearing 6:30 p.m.**

Susie Morris, Planning and Zoning Manager, reported on a conflict discovered in the ordinance last week. Therefore, the Public Service Facilities Standards needs to be amended from a Level 2 to a Level 1 in order for the text to be consistent in the ordinance.

Chairman Morris provided information on the process for the public to participate in the public hearing.

Chairman Morris opened the public hearing at 7:19 p.m. The public hearing notice was published on January 6 and 13, 2021 in *The Independent Tribune*. The public hearing notice was also posted on the County's website ([www.cabarruscounty.us](http://www.cabarruscounty.us)) on January 6, 2021 in accordance with Article 2, Administration, Section 2.1 (Use of Electronic Means to Provide Public Notices) of the Cabarrus County Code of Ordinances.

Chairman Morris asked Lauren Linker, Clerk to the Board, if any written comments had been submitted, if anyone was waiting on the phone or present in the Board of Commissioners Chambers to present a comment. Ms. Linker stated no written comments were submitted and no one was present in the Board of Commissioners Chambers. There was no one on the phone.

There were no comments, no one in person, nor any comments via the phone on this matter; therefore, Chairman Morris closed the public hearing.

**UPON MOTION** of Commissioner Shue, seconded by Vice Chairman Honeycutt and unanimously carried, the Board approved text amendment TEXT2020-00001, amending Chapter 1, 2, 3, 5, 6, 7, 8, 9, 12, 13, 14, 15 and Appendix A of the Cabarrus County Development Ordinance, made now but to go into effect after the required 24-hour period and with any additional comments reviewed, by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

Note: There were no comments received during the 24-hour period following the vote.

AN ORDINANCE AMENDING THE CABARRUS COUNTY DEVELOPMENT ORDINANCE  
TEXT2020-00001

BE IT ORDAINED that the Cabarrus Development Ordinance is hereby amended as follows:

AMEND CHAPTER 1 GENERAL PROVISIONS

Delete current Chapter and replace with revised Chapter 1.

AMEND CHAPTER 2 RULES OF CONSTRUCTION AND DEFINITIONS

Delete current Chapter 2 and replace with revised Chapter 2.

CHAPTER 3 ESTABLISHMENT OF ZONES

Delete current Chapter 3 and replace with revised Chapter 3.

Delete current permitted use table and replace with revised permitted use table.

CHAPTER 5 DISTRICT DEVELOPMENT STANDARDS

Delete current Chapter 5 and replace with revised Chapter 5.

CHAPTER 6 GENERAL REQUIREMENTS, EXCEPTIONS AND MODIFICATIONS

Delete current Chapter 6 and replace with revised Chapter 6.

CHAPTER 7 PERFORMANCE BASED STANDARDS

Delete current Chapter 7 and replace with revised Chapter 7.

CHAPTER 8 CONDITIONAL USES

Delete current Chapter 8 and replace with revised Chapter 8.

CHAPTER 9 LANDSCAPE

Amend Section 9-7 Parking Lot Area Landscape Buffer Requirements as follows:  
Shrubs are required in addition to trees and at a rate of three shrubs for every ~~10~~ **twenty** linear feet of planting yard.

Amend Section 9-9 Street Yard Landscape Buffer Area as follows:  
Shrubs are required in addition to trees and at a rate of five for every ~~fifteen~~ **thirty** linear feet of required planting area.

CHAPTER 12 ADMINISTRATION AND ENFORCEMENT

Delete current Chapter 12 and replace with revised Chapter 12.

CHAPTER 13 AMENDMENTS AND CHANGES

Delete current Chapter 13 and replace with revised Chapter 13.

CHAPTER 14 NONCOMFORMITIES

Delete current Chapter 14 and replace with revised Chapter 14.

CHAPTER 15 SUBDIVISIONS

Delete current Chapter 15 and replace with revised Chapter 15.

Appendix A

Delete current Appendix A and replace with revised Appendix A.

BE IT ALSO ORDAINED that the Cabarrus County Development Ordinance is hereby amended as follows:

RENUMBER AND REVISE the Table of Contents, numbered lists within the text/tables and page numbers in the Cabarrus County Development Ordinance to correspond to the text changes as needed.

Adopted this 19<sup>th</sup> day of January, 2021 by the Cabarrus County Board of Commissioners.

/s/ Stephen M. Morris  
Stephen M. Morris, Chairman  
Cabarrus County Board of Commissioners

ATTEST:

/s/ Lauren Linker  
Clerk to the Board

Consistency Statement for Proposed Amendment of the Cabarrus County  
Development Ordinance  
TEXT2020-00001

Having reviewed and considered the Proposed Amendments associated with text amendment TEXT2020-00001, the accompanying documents, the staff analysis, comments from the general public, and the recommendation from the Cabarrus County Planning and Zoning Commission, the Cabarrus County Board of Commissioners adopts this statement of consistency.

The Proposed Amendments are consistent with the direction provided by the North Carolina General Assembly to amend local ordinances for uniformity with 160D. The proposed amendments are also consistent with the adopted Small Area Land Use Plans (Plans) because the Plans seek to create a safe and healthy community, to preserve open space, to create expanded housing options, to limit property damage from flooding and to encourage economic development.

The Proposed Amendments are reasonable and in the public interest because: The proposed amendments conform to the direction provided by the North Carolina General Assembly to amend local ordinances for consistency with 160D. The proposed amendments are intended to streamline development regulation, clarify the development process and to provide plain language for ease of use by the general public. Additionally, the proposed amendments provide increased flexibility for non-conforming properties, codify legal interpretations and expand economic opportunity related to home occupations and businesses in Cabarrus County.

For the reasons set forth above, the Planning and Zoning Commission recommends that the Cabarrus County Board of Commissioners consider adopting proposed text amendment TEXT2020-00001.

For the reasons set forth above, the Cabarrus County Board of Commissioners hereby adopt this Statement of Consistency and approve TEXT2020-00001.

Signed this 19<sup>th</sup> day of January, 2021.

/s/ Stephen M. Morris  
Stephen M. Morris, Chair  
Cabarrus County Board of Commissioners

/s/ Lauren Linker  
Clerk to the Board of Commissioners

**(G-3) Kannapolis City Schools - 2020-21 North Carolina Department of Public Instruction Facility Needs Survey**

Will Crabtree, Kannapolis City Schools (KCS), Director of Business Operations, provided the North Carolina Department of Public Instruction Facility Needs Survey for the Board's review. Mr. Crabtree advised a statement of receipt is needed from the Board. He also responded to questions from the Board.

The Board acknowledged receipt of the survey by consensus.

**(H) REPORTS**

**(H-1) BOC - Receive Updates from Commission Members Who Serve as Liaisons to Municipalities or on Various Boards/Committees**

Commissioner Strang, liaison to the Town of Midland, reported on an update on the water project and the Veterans Memorial at Rob Wallace Park.

Commissioner Strang, liaison to the Youth Commission, reported the Youth Commission has selected two initiatives, "Mental Health Mondays" and "Talk it Out Tuesdays" for this year.

Commissioner Shue, liaison to Centralina Regional Council of Governments, advised of upcoming meetings regarding regional high capacity transit. Chairman Morris provided additional comments.

Commissioner Kiger, provided comments on his virtual attendance at the North Carolina Association of County Commissioners Legislative Goals meeting.

Chairman Morris, member of the Public Health Authority of Cabarrus County, expressed appreciation for all the work done by the Health Alliance, particularly with the Covid-19 pandemic. He also commented on his experience receiving the

vaccine and recommended everyone receive the vaccine when it is available for them.

Vice Chairman Honeycutt commented on the positive feedback from the public regarding their experience receiving the vaccine and thanked the Health Alliance and volunteers.

**(H-2) Board of Commissioners - Request for Applications for County Boards/Committees**

Applications are being accepted for the following County Boards/Committees:

- Active Living and Parks Commission - 2 Terms Expiring Soon
- Adult Care Home Community Advisory Committee - 7 Vacant Positions
- Agricultural Advisory Board - 2 Terms Expiring Soon
- Concord Planning and Zoning Commission (ETJ) - 1 Vacant Position
- Early Childhood Task Force Advisory Board - 6 Vacant Positions
- Harrisburg Fire Advisory Board (ETJ) - 1 Vacant Position
- Human Services Advisory Board - 1 Vacant Position
- Industrial Facilities and Pollution Control Financing Authority - 2 Terms Expiring Soon
- Juvenile Crime Prevention Council - 3 Vacant Positions
- Library Board of Trustees - 1 Position Expiring Soon
- Mental Health Advisory Board - 11 Expired Terms
- Nursing Home Community Advisory Committee - 8 Vacant Positions
- Region F Aging Advisory Committee - 1 Vacant Position
- Transportation Advisory Board - 3 Vacant Positions
- Youth Commission - 5 Vacant Positions

Chairman Morris urged citizens to consider participating on a Board or Committee.

**(H-3) County Manager - Monthly Building Activity Reports**

The Board received the Cabarrus County Construction Standards Dodge Report for December 2020 and the Cabarrus County Commercial Building Plan Review Summary for December 2020 for informational purposes. No action was required of the Board.

**(H-4) County Manager - Monthly New Development Report**

The Board received the monthly new development report for informational purposes. No action was required of the Board.

**(H-5) Economic Development Corporation - December 2020 Monthly Summary Report**

The Board received the Cabarrus Economic Development Corporation (EDC) monthly report for the month of December 2020 for informational purposes. No action was required of the Board.

**(H-6) Finance - Monthly Financial Update**

The Board received the monthly financial update report for informational purposes. No action was required of the Board.

**(I) GENERAL COMMENTS BY BOARD MEMBERS**

None.

**(J) WATER AND SEWER DISTRICT OF CABARRUS COUNTY**

None.

**(K) CLOSED SESSION**

None.

**(L) ADJOURN**

UPON MOTION of Commissioner Strang, seconded by Commissioner Shue and unanimously carried, the meeting adjourned at 7:37 p.m. by the following vote: Ayes: Chairman Morris, Vice Chairman Honeycutt, and Commissioners Kiger, Shue and Strang. Nays: None. Absent: None.

Lauren Linker, Clerk to the Board

DRAFT

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Approval of the Agenda

**SUBJECT:**

BOC - Changes to the Agenda

**BRIEF SUMMARY:**

A list of changes to the agenda is attached.

**REQUESTED ACTION:**

Motion to approve the agenda as amended.

**EXPECTED LENGTH OF PRESENTATION:**

1 Minute

**SUBMITTED BY:**

Lauren Linker, Clerk to the Board

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

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**ATTACHMENTS:**

- Changes to the Agenda



**CABARRUS COUNTY BOARD OF COMMISSIONERS  
CHANGES TO THE AGENDA  
FEBRUARY 15, 2021**

**ADDITIONS:**

**New Business**

**G-2 LME-MCO Realignment Written Request**

**G-3 Planning and Development – Weatherization Cares Contract and Associated Budget Amendment**

**Closed Session**

**K-1 Closed Session - Pending Litigation and Economic Development**

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Recognitions and Presentations

**SUBJECT:**

County Manager - Procurement Month Proclamation

**BRIEF SUMMARY:**

The following proclamation designates March as Procurement Month in Cabarrus County.

**REQUESTED ACTION:**

Motion to adopt the proclamation.

**EXPECTED LENGTH OF PRESENTATION:**

5 Minutes

**SUBMITTED BY:**

Rodney Harris, Deputy County Manager

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- ▢ Proclamation



## PROCUREMENT MONTH 2021 PROCLAMATION

**WHEREAS**, the public procurement profession plays a significant role in the efficiency and effectiveness of government and business; and

**WHEREAS**, governmental procurement professionals contribute positively to public agencies and services by improving procurement methods and practices and by utilizing technologies and industry best practices to increase efficiency and improve processes; and

**WHEREAS**, these procurement professionals dedicate themselves to providing the best value for every taxpayer dollar; they provide high-caliber strategic, logistical and operational support for agencies and they dedicate themselves to expanding their knowledge, skills and abilities for the public good; and

**WHEREAS**, in addition to the purchase of goods and services, public procurement adds value to the organization by performing such functions as executing, implementing and administering contracts, developing strategic procurement strategies and cultivating working relationships with suppliers and other departments within the organization; and

**WHEREAS**, public procurement has tremendous influence on the economic conditions in the State of North Carolina, its municipalities and indeed across the United States, with a cumulative purchasing power running into the billions of dollars; and

**WHEREAS**, the National Institute of Governmental Purchasing (NIGP), has proclaimed the month of March as "Procurement Month" to further expand the awareness of the procurement professional's role to government officials, the general public and businesses;

**NOW, THEREFORE, BE IT PROCLAIMED** that the Board of Commissioners for Cabarrus County, North Carolina, do hereby recognize March 2021 as Public Procurement Month for its impact on governmental purchasing in North Carolina.

**ADOPTED** this 15<sup>th</sup> day of February, 2021.

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Stephen M. Morris, Chairman  
Cabarrus County Board of Commissioners

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Recognitions and Presentations

**SUBJECT:**

DHS - Social Worker Appreciation Month

**BRIEF SUMMARY:**

The following proclamation recognizes March 2021 as Social Worker Appreciation Month in Cabarrus County.

**REQUESTED ACTION:**

Motion to adopt the proclamation.

**EXPECTED LENGTH OF PRESENTATION:**

5 Minutes

**SUBMITTED BY:**

Karen Calhoun, Human Services Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- Proclamation



## SOCIAL WORK MONTH 2021 PROCLAMATION “SOCIAL WORKERS ARE ESSENTIAL”

**WHEREAS**, the Social Work Profession for decades has been dedicated to improving human well-being and enhancing the basic needs of all people—especially the most vulnerable among us;

**WHEREAS**, this year’s Social Work Month theme, “Social Workers Are Essential,” embodies the heroic contributions of the Social Work profession to our nation, including the work Social Workers have done to heal our nation during these times of pandemic, racial unrest, economic uncertainty and political divisiveness;

**WHEREAS**, Social Workers have always been present in times of crisis, helping people overcome issues such as death and grief and helping people and communities recover from natural disasters such as fires, hurricanes and earthquakes;

**WHEREAS**, Social Workers have helped this nation live up to its values by successfully advocating for equal rights for all people, no matter their race, sexual identity, gender, gender expression, culture or religion;

**WHEREAS**, the Social Work Profession is one of the fastest growing professions in the United States, with nearly 800,000 people expected to be employed as Social Workers by 2028;

**WHEREAS**, Social Workers work in all parts of our society to empower people to live to their fullest potential;

**WHEREAS**, School Social Workers have worked with families and school throughout the pandemic to ensure students reach their full academic and personal potential;

**WHEREAS**, Social Workers play a crucial role in our nation’s health care system and have played a key role in this nation’s response to COVID-19 and helping individuals, families and communities cope with the epidemic;

**WHEREAS**, Social Workers for generations have advocated for positive changes that have made our society a better place to live, including urging policymakers to adopt the minimum wage, improve workplace safety, and enact social safety net programs that help ameliorate hunger, homelessness, and poverty;

**WHEREAS**, Social Workers are one of the largest groups of mental health care providers in the United States, and work daily to help people—whether in person or remotely—overcome substance use disorders and mental illnesses such as depression and anxiety;

**WHEREAS**, Social Workers will continue to stand ready to assist our nation in overcoming present and future challenges, including pushing for racial equity, ending gun violence, improving health care and mental health care for all and urging lawmakers to adopt immigration reforms;

**NOW THEREFORE**, in recognition of the numerous contributions made by America’s Social Workers, we, the Cabarrus County Board of Commissioners, proclaim the month of March 2021 as National Social Work Month and call upon all citizens to join the National Association of Social Workers and Cabarrus County in celebration and support of the Social Work Profession.

**ADOPTED** this 15<sup>th</sup> day of February, 2021.

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Stephen M. Morris, Chairman  
Cabarrus County Board of Commissioners

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Active Living and Parks - Lease for Cox Mill School Park Property to City of Concord

### **BRIEF SUMMARY:**

Concord Parks and Recreation Department acquired a tract of land located between Cox Mill Elementary School and a 34 acre Conservation Easement tract owned by Cabarrus County Soil and Water District.

Concord Parks and Recreation Department has plans to build a park on the land to serve the citizens of the west side of the County. This area was identified in their Masterplan as a priority for recreation amenities.

The Odell Volunteer Athletic Association currently utilizes Cox Mill School Park as their home base. Concord Parks and Recreation has been working with Odell Athletic Association to administer their sport programs and maintain the athletic fields. An agreement between Odell and Concord is currently in progress to solidify this process.

Concord Parks and Recreation has been in contact with Daniel McClellan, Soil and Water District Manager and Kelly Sifford, Cabarrus County Planning Director regarding the Conservation tract and working together to provide educational opportunities, parking, and natural surface trails to access the tract. Mrs. Sifford is in agreement with the plans Concord has currently presented.

Concord Parks and Recreation has been in contact with Tim Lowder, Cabarrus County Schools Executive Director of Operations about this project. There has been discussion about joint use of the current entrance drive as well as parent pick-up/drop off opportunities. Concord will assume maintenance of the School Park property as part of this agreement. Mr. Lowder is in agreement with the plans Concord has currently presented.

Concord planned to have the Annexation request of the park site to Council in November and Planning and Zoning in December.

**REQUESTED ACTION:**

Motion to approve leasing the Cox Mill Elementary School Park site to the City of Concord; and authorize the County Manager to execute the contract on behalf of Cabarrus County, subject to review or revisions by the County Attorney.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Londa Strong, Active Living and Parks Director  
Sheila Lowery, Assistant Concord Parks and Recreation Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Aerial Exhibit - COX MILL
- ▣ Draft Agreement



ALLEN MILLS

CABARRUS CO.  
SOIL AND WATER  
CONSERVATION

COX MILL  
HIGH SCHOOL

HIGHLAND  
CREEK

COX MILL  
ELEMENTARY

CABARRUS CO.  
& ODELL  
SPORTS FIELDS

EDENTON AT  
COX MILLS

COX MILL ROAD

GRANARY  
OAKS

This Lease Agreement (hereinafter referred to as "Agreement" or "Lease Agreement") is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between the County of Cabarrus, North Carolina (hereinafter referred to as "County"); and the City of Concord, North Carolina (hereinafter referred to as "City") for the lease of \_\_\_\_\_ (hereinafter referred to as "Park") as shown in Exhibit A attached.

WITNESSETH:

WHEREAS, this Agreement is executed pursuant to G.S. 160A-274 and G.S. 153A-165 providing for the lease and joint use of government property;

WHEREAS, the County and the City desire to cooperatively provide recreational and park services, programs and facilities for the welfare and quality of life of their citizens;

WHEREAS, the County has developed a 34 acre public park near Cox Mill Elementary School and wishes to enter into this Agreement with the City to manage, operate, program and maintain the park;

WHEREAS, this Agreement is intended to set forth certain responsibilities and obligations between the parties relating to the management, operations, programming and maintenance of a public park in the County;

WHEREAS, the City and County both strive for efficient use of tax dollars and joint projects between the City and County reduce duplication of services and promote more effective use of public monies;

NOW THEREFORE, upon valuable consideration, the receipt of which is hereby acknowledged by each party and upon the premises contained here, the parties agree as follows:

ARTICLE I: PARK PROPERTY LEASE AND ASSETS

1.0 Park Property. The County is the owner of approximately 34 acres of land located at 1300 Cox Mill Road, Concord, NC 28027 which the County has developed into public ballfields named Cox Mill Elementary School Fields as shown in Exhibit A attached.

1.1 Lease of Park Property. The County and City do hereby agree that the City shall lease the Park property from the County upon the terms and conditions set forth herein.

1.2 Term. The term of the lease of the Park shall be for a period of fifty (50) years beginning August 1, 2021 and Ending on September 30, 2071 ("Term"). The lease may be extended for an additional twenty-five (25) year term if approved by both the City Council and Cabarrus County Commissioners.

1.3 Annual Lease Payment. The City shall pay an annual lease payment of one dollar (\$1.00) to the County to lease the Park from the County. The City shall not be required to pay any additional fees to the County for the lease, operations, programming or maintenance of the Park.

ARTICLE II: PARK DESIGN AND DEVELOPMENT

2.1 Walkthrough. City and County staff shall complete a joint walkthrough of the Park before approval of this Agreement by the City and County. The County shall be responsible for addressing safety and repair concerns noted during the walkthrough.

2.2 Americans with Disabilities Act (ADA). The County agrees that the Park facilities are compliant with ADA requirements as stated in the NC Building Codes including provision of handicapped accessible restrooms. The County shall be responsible for paying the costs of any facility changes necessary to meet ADA regulations on Park facilities (ball fields, playground, trail concession building, restrooms etc.) leased to the City.

2.3 Future Development. The quality of the Park and its development shall continue as an ongoing project throughout the term of this Agreement and the City may develop additional recreational facilities within the Park at a later date at its sole discretion. These improvements and all design construction costs will be at no cost to the County. Any alteration, addition or improvement will be completed in good and workmanlike manner in accordance with plans, specifications and drawings and in compliance with all applicable laws, regulations and codes. All recreational facilities (fixed assets) remain the property of the County. Any Park facilities constructed by the City during the term of the lease (i.e. storage building) shall become property of the County and leased by the City at no additional cost.

#### ARTICLE III: PARK OPERATIONS

3.1 Park Management. During the term of the Agreement, the City shall manage, operate, program and supervise use of the Park for the benefit of the public.

3.2 Park Operations. The City shall provide, promote, administer and operate recreational facilities, programs and services in the Park, consistent with other City Parks and recreational facilities, inclusive of all operational hours. The City may, at its discretion and sole expense, choose to expand the hours and days of the operation of the Park, consistent with other parks in the City's park system.

3.3 Third-Party Agreement. The City may execute and enter in such agreements with third parties as it deems necessary or advisable for the provision of programs and services offered at the Park.

3.4 Fees and Charges. The City shall adopt a Facility Rental Policy and Fee Schedule for use of the Park facilities and/or participation in Park programs and services. Different fee amounts may apply to city residents and non-city residents for programs and park services. Facility use charges (picnic shelter and ball field rental charges) shall be consistent for city and non-city residents. The City may revise fees and charges at its discretion. All fees, charges and other revenue collected, including concession revenue, shall be the property of the City.

3.5 Utilities. The City shall pay all water, sewer, electric and other utility charges for services to the Park beginning August 1, 2021.

3.6 Field Sponsorships. The City may solicit and approve corporate sponsors for fields and facilities at the Park in connection with the Odell Youth Athletic Association. All sponsors shall be allowed to display signage with sponsor name and logo as approved by the City. Any revenue derived from field or facility sponsorships shall be the property of the City or as outlined in the Priority Use Agreement.

#### ARTICLE IV: PARK MAINTENANCE, REPAIRS AND USE OF FACILITY

4.1 Use of Property. The City will have the exclusive use of the Park including but not limited to all fields, common areas and concession and bathroom facilities therein. The City shall at all times use the Park in accordance with the Conservation Easement and Easement for Ingress/Egress dated January 14, 2011 and recorded in the Cabarrus County Register of Deeds on January 21, 2011 in Book 09452 at Page

0026-00054 and all applicable laws, rules, codes, regulations and ordinances. To the extent practicable, the City intends to work with the Odell Youth Athletic Association to develop a Priority Use Agreement.

4.2 Maintenance Responsibilities. The City shall maintain the Park as part of the City's park system and in a manner consistent with maintenance performed at other City park and recreational facilities. The City may contract for maintenance and grounds keeping services at the Park with a private contractor. The City will be solely responsible to repair and maintain and keep the Park and the sidewalks, parking lot, curbs, and landscaping in good order and condition in accordance with applicable ordinances, ordinary wear and tear, casualty loss and condemnation excepted.

4.3 Maintenance Schedule. The City shall adopt a maintenance schedule for the Park consistent with maintenance schedules at other comparable City park and recreation facilities.

4.4 Repairs and Replacement of Facilities. The City shall be responsible for the general repairs, replacement and maintenance of all park facilities and improvements at the Park, including without limitation, structural repairs to roofs, asphalt, fencing, buildings, etc.

#### ARTICLE V: DAMAGE OR DESTRUCTION AND MAJOR REPAIRS

5.1 Repair and Restoration. If at any time during the Term hereof, the Facility or any part thereof is damaged or destroyed by fire or other occurrence of any kind or nature, ordinary or extraordinary, foreseen or unforeseen, The City will proceed with reasonable diligence to repair, alter, restore, replace, or rebuild the same as nearly as possible to its value, condition, and character immediately prior to such damage or destruction.

Notwithstanding the foregoing, if (i) the available insurance proceeds are insufficient to repair, alter, restore or rebuild the Park or any part thereof to as nearly as possible to its value, condition, character immediately prior to such damage or destruction, (ii) fire or other casualty renders the whole or any material part of the Park untenable or unusable for its intended purposes, and the City determines in its reasonable discretion, that it cannot make the Park tenantable or usable for its intended purposes within one hundred eighty (180) days after the casualty, then the City shall have the right, in its sole discretion, to terminate the Lease Agreement by providing thirty (30) days' prior notice of such election to terminate and giving the County all applicable insurance proceeds in the amounts required by the Agreement. Anything herein to the contrary notwithstanding, the City must immediately secure the Park and undertake temporary repairs and work necessary to protect the public and to protect the Park from further damage.

In the event of major repairs needed to the Park and its facilities not covered by insurance, including but not limited to, failure of the pump station resulting in the need of major repairs and/or replacement; failure of the lighting system resulting in the need of major repairs and/or replacement, the County and the City shall share the costs of said major repairs and/or replacement equally.

#### ARTICLE VI: CITY FUNDING

6.1 This Agreement is contingent upon the Concord City Council approving Parks and Recreations funding request in its FY22 budget for the maintenance and staff necessary to maintain the Park.

6.2 In the event the City Council does not approve the funding request in its FY22 budget for the maintenance and staffing of the Park, the City will not move forward with this Agreement and it shall become null and void.

#### ARTICLE VII: MISCELLANEOUS

7.1 Indemnity and Insurance. The City and the County do hereby indemnify and hold harmless each other from any and all liabilities, losses, costs or expenses whatsoever (including without limitation, attorneys' fees and court costs) as they are incurred and finally awarded, arising out of, attributable to or resulting from any claims by the other party, its agents, invitees, employees, or by any third parties, as a result of occurrences within the Park. The City shall maintain in force during the Term of the Lease Agreement, public liability insurance naming the County as an additional insured, with coverage in an amount of no less than \$1,000,000,.00 per occurrence. Such policy shall contain a provision that the policy cannot be canceled without thirty (30) days prior written notice to the County. A copy of said policy or endorsement and each renewal thereof during the Term of this Lease Agreement shall be delivered to the County.

7.2 Entry upon Abandonment. In the event the City at any time during the Term of this Lease Agreement abandons the Park or any part thereof, the County may, at County's option, retake possession of the Property.

73. Miscellaneous. Each Party to this Agreement further agrees as follows:

i. Without further consideration, each party shall at any time, and from time to time, execute and deliver to any other party such further documents, and take such other action, as an other party may reasonably request in order to effectuate the purposes of this Agreement.

ii. All understandings and agreements heretofore had between the parties are merged in this Agreement and the related agreements, if any, executed in conjunction with this Agreement all of which together fully and completely express their agreement, and no representations or warranties have been made by any party to another party except as are herein expressly set forth or required pursuant to this Agreement and the related agreements, if any, executed in conjunction with this Agreement.

iii. This Agreement may not be altered, changed or amended except by an instrument in writing signed by both the City and the County. The parties hereto may amend the Exhibits attached hereto by mutual agreement as many times as needed by attaching an initialed Exhibit hereto with the same name as the Exhibit they are replacing but with a consecutive number added to the end of the Exhibit letter for each amendment (e.g. Exhibit A-1, followed by Exhibit A-2).

iv. The headings in this Agreement are for purposes of reference only and shall not limit or otherwise affect any of the terms hereof.

v. This Agreement shall be binding upon and shall inure to the benefit of the parties hereto and their respective heirs, legal representatives, successors and assigns.

vi. If any provision of this Agreement is determined by a court of competent jurisdiction to be illegal or unenforceable, such provision shall be automatically reformed and construed as to be valid, operative and enforceable to the maximum extent permitted by law or equity while preserving its original intent. The invalidity of any part of this Agreement shall not render invalid the remainder of the Agreement.

vii. The execution and delivery of this Agreement and the performance of the obligations hereunder have been duly authorized by all requisite actions required by law of each party.

viii. Any correspondence relating to Cox Mill Elementary Athletic Fields should be sent to the following Address:

City of Concord  
Director of Parks and Recreation  
P.O. Box 308  
Concord, NC 28026

IN WITNESS WHEREOF, the Cabarrus County Commissioners and the Concord City Council have approved this Agreement and caused it to be executed and attested by their duly authorized officials.

COUNTY OF CABARRUS

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

ATTEST:

\_\_\_\_\_

CLERK

[SEAL]

This instrument has been preaudited in the manner required by Local Government Budget and Fiscal Control Act.

\_\_\_\_\_

Cabarrus County Finance Director

CITY OF CONCORD

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

ATTEST:

\_\_\_\_\_

CLERK

[SEAL]

Approved as to form:

\_\_\_\_\_

VaLerie Kolczynski, City Attorney

This instrument has been preaudited in the manner required by Local Government Budget and Fiscal Control Act.

\_\_\_\_\_

City of Concord Finance Director

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

**February 15, 2021  
6:30 PM**

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**AGENDA CATEGORY:**

Consent Agenda

**SUBJECT:**

Active Living and Parks - Sale of Fixed Asset Budget Amendment

**BRIEF SUMMARY:**

The Active Living and Parks Department sold used fitness equipment (GovDeals) from the Concord Senior Center totaling \$4,225.33.

The department is requesting to use funds to supplement the cost of a replacement stepper machine at the Concord Senior Center.

**REQUESTED ACTION:**

Motion to approve the required budget amendment.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Londa Strong, Active Living and Parks Director

**BUDGET AMENDMENT REQUIRED:**

Yes

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

▢ Budget Amendment



# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

**February 15, 2021  
6:30 PM**

**AGENDA CATEGORY:**

Consent Agenda

**SUBJECT:**

Appointments - Firemen's Relief Fund Trustees

**BRIEF SUMMARY:**

The Cabarrus County Volunteer Fire Departments have submitted the following individuals for appointments/reappointments as Firemen's Relief Fund Trustees\*:

<u>Volunteer</u>	<u>Department</u>
Chris Whiting	Allen
Raymond N. Blackwelder, Jr.	Cold Water
Artie Craig	Flowes Store
Raheem Cruse	Georgeville
Brian Lee	Harrisburg
Darrell Page	Midland
Randall Ritchie	Mt. Mitchell
Jeff Russell	Mt. Mitchell
Lori Furr	Mt. Pleasant Rural
Richard V. Bergeron, II	North East
Jacob Williams	Odell
Marty Ritchie	Rimer

\*These appointments are exempt from the County Appointment Policy. Recommendations are submitted by each of the respective volunteer fire departments.

**REQUESTED ACTION:**

Motion to appoint Raheem Cruse (Georgeville), Brian Lee (Harrisburg), Randall Ritchie (Mt. Mitchell), and Marty Ritchie (Rimer); and reappoint Chris Witing (Allen), Raymond N. Blackwelder Jr. (Cold Water), Artie Craig (Flowes Store), Darrell Page (Midland), Lori Furr (Mount Pleasant Rural), Richard Bergeron, II (North East), Jacob Williams (Odell) to the Firemen's Relief Fund Trustees for two-year terms ending January 31, 2023.

Motion to appoint Jeff Russell (Mt. Mitchell) to the Firemen's Relief Fund Trustees for a one-year term ending January 31, 2022.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Steve Langer, Emergency Management Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- Proposed Roster

FIREMEN'S RELIEF FUND TRUSTEES  
2-Year Terms

<u>DEPARTMENT</u>	<u>TRUSTEES' NAMES</u>	<u>EXPIRATION DATE</u>
Allen	Chris Whiting	1/31/2023
Allen	Jerry Helms	1/31/2022
Cold Water	Raymond N.Blackwelder, J	1/31/2023
Cold Water	David R.Blackwelder	1/31/2022
Flowes Store	Artie Craig	1/31/2023
Flowes Store	Joey Houston	1/31/2022
Georgeville	Raheem Cruse	1/31/2023
Georgeville	Kelly Whitley	1/31/2022
Harrisburg	Brian Lee	1/31/2023
Harrisburg	Tim Wooten	1/31/2022
Midland	Darrell Page	1/31/2023
Midland	Joe Eudy	1/31/2022
Mt. Mitchell	Randall Ritchie	1/31/2023
Mt. Mitchell	Jeff Russell	1/31/2022
Mount Pleasant Rural	Lori Furr	1/31/2023
Mount Pleasant Rural	Del Eudy	1/31/2022
North East	Richard V. Bergeron, II	1/31/2023
North East	Dylan Daquila	1/31/2022
Odell	Jacob Williams	1/31/2023
Odell	Danny Brown	1/31/2022
Rimer	Marty Ritchie	1/31/2023
Rimer	Rebecca Shue	1/31/2022

Exempt from the County's Appointment Policy. Recommendations for appointment are submitted by each of the respective volunteer fire departments.

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Appointments - Juvenile Crime Prevention Council

### **BRIEF SUMMARY:**

An application to serve on the Juvenile Crime Prevention Council has been submitted by Baylee Barkley. She is a student at Kannapolis Middle School and is eligible to serve as the Student under 18 for Kannapolis City Schools representative. The Council voted to recommend her for appointment at their January meeting.

### **REQUESTED ACTION:**

Motion to appoint Baylee Barkley to the Juvenile Crime Prevention Council as the Student Under 18/KCS representative to complete an unexpired term ending June 30, 2021.

### **EXPECTED LENGTH OF PRESENTATION:**

### **SUBMITTED BY:**

Lauren Linker, Clerk to the Board

### **BUDGET AMENDMENT REQUIRED:**

No

### **COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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### **ATTACHMENTS:**

- ▣ Roster
- ▣ Application on File

**JUVENILE CRIME PREVENTION COUNCIL  
2-Year Terms**

	<b><u>Appointee</u></b>	<b><u>Representing</u></b>	<b><u>Term of Appointment</u></b>
(1)	Amy Jewell 9287 Naron Lane Harrisburg, NC 28075	School Superintendent (Designee)	Appointment: 07/21/20**** Term Ending: 09/30/22
(2)	Vacant	Police Chief	Appointment: Term Ending: 09/30/21
(3)	Brian Heintz Sheriff's Department P.O. Box 707 Concord, NC 28026	Sheriff (or designee)	Appointment: 10/15/18 (unexpired term) Reappointment: 09/21/20 Term Ending: 09/30/22
(4)	Beth Street 509 Burrage Road Concord, NC 28025	District Attorney (or designee)	Appointment: 10/21/19 (unexpired term) Reappointment: 07/21/20 Term Ending: 06/30/22
(5)	David Wall 415 North Bruton Drive Candor, NC 27229	Chief Court Counselor (Designee)	Appointment: 09/19/16 Reappointment: 09/17/18^< Reappointment: 09/21/20^< Term Ending: 09/30/22
(6)	Noel Thomas-Lester Cardinal Innovations Healthcare 5500 S. Caldwell St. Suite 1500 Charlotte, NC 28202	Area Mental Health Director (Designee)	Appointment: 10/15/18^ Reappointment: 09/21/20^ Term Ending: 09/30/22
(7)	Sharon Reese Department of Social Services 1303 S. Cannon Boulevard Kannapolis, NC 28083	DSS Director (Designee)	Appointment: 06/17/19^^ (unexpired term) Appointment: 06/17/19^^ Term Ending: 09/30/21
(8)	Rodney Harris P. O. Box 707 Concord, NC 28026-0707	County Manager (or Designee)	Appointment: 12/21/20< (unexpired term) Term Ending: 09/30/21
(9)	Terry Wise 391 Knoll Court SE Concord, NC 28025	Substance Abuse Professional	Appointment: 07/17/18 Reappointment: 07/21/20 Term Ending: 06/30/22

(10)	Steven Ayers 296 Trillium Street Concord, NC 28027	Member of Faith Community	Appointment: 09/19/11 Reappointment: 09/16/13 Reappointment: 09/21/15 Reappointment: 10/16/17 Reappointment: 09/16/19* Term Ending: 09/30/21
(11)	Steve Morris P. O. Box 707 Concord, NC 28026	County Commissioner	Appointment: 12/17/12 Reappointment: 12/16/13 Reappointment: 12/15/14 Reappointment: 12/14/15 Reappointment: 12/19/16 Reappointment: 12/18/17 Reappointment: 01/22/19 Reappointment: 12/16/19 Reappointment: 12/21/20 Term Ending: 12/31/21
(12a)	Vacant	Student < 18 CCS	Appointment: Term Ending: 06/30/20
(12b)	Vacant	Student <18 KCS	Appointment: Term Ending: 06/30/21
(13)	Heather Mobley 145 Union Street South, Suite 108 Concord, NC 28025	Juvenile Defense Attorney	Appointment: 03/20/17^ (unexpired term) Reappointment: 07/17/17^ Reappointment: 06/17/19^ Term Ending: 06/30/21
(14)	Judge Nathaniel Knust County Courthouse P. O. Box 70 Concord, NC 28026-0070	Chief District Court Judge (Designee)	Appointment: 02/20/17 Reappointment: 07/17/17 Reappointment: 06/17/19 Term Ending: 06/30/21
(15)	Mark Boles 117 Academy Avenue NW Concord, NC 28025	Member of Business Community	Appointment: 02/18/13 Reappointment: 09/16/13 Reappointment: 09/21/15 Reappointment: 10/16/17 Reappointment: 09/16/19* Term Ending: 09/30/21
(16)	Sonja Bohannon-Thacker 2110 Dairy Farm Road Concord, NC 28025	Local Health Director (Designee)	Appointment: 09/16/13 Reappointment: 09/21/15 Reappointment: 10/16/17 Reappointment: 09/16/19* Term Ending: 09/30/21

(17) Carolyn Carpenter  
6526 Weldon Circle  
Concord, NC 28027  
Rep. United Way/Other  
Non-Profit  
Appointment: 11/27/06  
Reappointment: 07/20/09  
Reappointment: 06/20/11  
Reappointment: 05/20/13\*  
Reappointment: 06/15/15\*  
Reappointment: 07/17/17\*  
Reappointment: 06/17/19\*  
Term Ending: 06/30/21

(18) Perry Gabriel  
Parks  
P. O. Box 707  
Concord, NC 28026-0707  
Active Living & Parks  
Appointment: 09/20/10  
Reappointment: 08/20/12  
Reappointment: 09/15/14  
Reappointment: 09/19/16\*  
Reappointment: 09/17/18\*  
Reappointment: 09/21/20\*  
Term Ending: 09/30/22

County Commissioner Appointees (At-large members)

(19a) Etta Downs  
970 Mount Pleasant Road W  
Mount Pleasant, NC 28124  
Appointment: 07/17/18  
Reappointment: 09/21/20  
Term Ending: 09/30/22

(19b) Jamica La Franque  
3852 French Fields Lane  
Harrisburg, NC 28075  
Appointment: 07/17/18  
Reappointment: 07/21/20  
Term Ending: 06/30/22

(19c) Joy Butler  
2024 Breezewood Drive  
Charlotte, NC 28262  
Appointment: 07/21/20  
(unexpired term)  
Term Ending: 09/30/21

(19d) Michelle Wilson (Vice Chair)  
41 Eastcliff Drive SE  
Concord, NC 28025  
Appointment: 11/16/09  
(unexpired term)  
Reappointment: 09/19/11  
Appointment: 05/20/13\*\*  
(unexpired term)  
Reappointment: 06/16/14  
Reappointment: 06/20/16  
Reappointment: 06/18/18\*  
Reappointment: 07/21/20\*  
Term Ending: 06/30/22

(19e) Connie Philbeck  
1100 Braughton Avenue  
Concord, NC 28025  
Appointment: 05/20/13\*\*\*  
Reappointment: 06/15/15  
Reappointment: 07/17/17  
Reappointment: 06/17/19\*  
Term Ending: 06/30/21

- |  |  |
|--|--|
| <p>(19f) Megan Baumgardner (Chairman)<br/>7120 Macedonia Ch. Rd.<br/>Concord, NC 28027</p> | <p>Appointment: 01/19/10<br/>(unexpired term)<br/>Reappointment: 06/21/10<br/>Reappointment: 06/18/12<br/>Reappointment: 06/16/14<br/>Reappointment: 06/20/16*&lt;<br/>Reappointment: 06/18/18*&lt;<br/>Appointment: 08/19/19*&lt;<br/>(unexpired term)<br/>Reappointment: 09/21/20*&lt;<br/>Term Ending: 09/30/22</p> |
| <p>(19g) Marta Meares<br/>178 Mary Circle<br/>Concord, NC 28025</p>                        | <p>Appointment: 05/18/09<br/>(unexpired term)<br/>Reappointment: 09/21/09<br/>Reappointment: 09/19/11<br/>Reappointment: 09/16/13<br/>Reappointment: 09/21/15*<br/>Reappointment: 10/16/17*<br/>Reappointment: 09/16/19*<br/>Term Ending: 09/30/21</p>   |

\* Note: An exception to the Appointment Policy “Length of Service” was granted.

\*\*Michelle Wilson was appointed as the “Local Health Director/Designee” representative on 11/16/09 (unexpired term) and reappointed 09/19/11. She was appointed to an “At-large” position on 05/20/13.

\*\*\*Connie Philbeck was appointed on 05/20/13 to complete an unexpired term and an additional 2-year term ending June 30, 2015.

^ An exception to the Appointment Policy “residency” provision was granted.

< An exception to the Appointment Policy “multiple service” provision was granted.

^^Sharon Reese was appointed to complete an unexpired term and additionally to a two-year term ending September 30, 2021 at the Boards’ June 17, 2019 regular meeting.

\*\*\*\*Amy Jewell was appointed as the “School Superintendent/Designee” representative on July 21, 2020 to complete an unexpired term and an additional two-year term ending September 30, 2022.

**Juvenile Crime Prevention Council  
Applications on File  
January 26, 2021**

Baylee Barkley

2604 Captain Watch Road NE

Kannapolis, NC 28083

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

**February 15, 2021  
6:30 PM**

### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Appointments and Removals - Early Childhood Task Force Advisory Board

### **BRIEF SUMMARY:**

Early Childhood Task Force Advisory Board member Susan King retired and has resigned from the committee. It is requested to remove her name from the roster.

Rodney Harris is resigning from his position on the committee. He recommended Carla Brown, the new Early Childhood Education Coordinator, be appointed to fill his position.

During the Early Childhood Task Force Advisory Board's virtual meeting on January 12, 2021, members reviewed applications and voted to recommend the following for appointment to the committee: Marcella Beam, Carla Brown, Justina Clemmons, Stephanie Fish, Chris Jarrett, Mande LaCroix, Jessie Napoli, Jennifer Threadgill and Kevin Vinson. Ms. Beam and Ms. Brown do not reside in Cabarrus County, therefore an exception to the residency provision of the Appointment Policy will be needed for them.

### **REQUESTED ACTION:**

Motion to remove Susan King and Rodney Harris from the Early Childhood Task Force Advisory Board roster and thank them for their service.

Motion to appoint Marcella Beam, Justina Clemmons, Stephanie Fish, Chris Jarrett, Mande LaCroix, Jessie Napoli, Jennifer Threadgill and Kevin Vinson to the Early Childhood Task Force Advisory Board for four-year terms ending February 28, 2025; including an exception to the residency provision of the Appointment Policy for Ms. Beam.

Motion to appoint Carla Brown to the Early Childhood Task Force Advisory Board to complete an unexpired term ending July 31, 2024; including an exception to the residency

provision of the Appointment Policy.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Lauren Linker, Clerk to the Board

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Roster
- ▣ Applications on File

Early Childhood Task Force Advisory Board  
(ECTFAB)  
15 Member Board

<u>APPOINTEE</u>	<u>DATE OF APPOINTMENT</u>	
Rodney Harris P.O. Box 707 Concord, NC 28026	Appointment:	07/21/20
	Term Expiring:	07/31/24
Ann Benfield^ 563 Marigold Drive Kannapolis, NC 28083	Appointment:	07/17/18
	Term Expiring:	07/31/22
Susan King 4047 Center Place Drive Harrisburg, NC 28075	Appointment:	07/17/18
	Term Expiring:	07/31/22
Lora Lipe 3976 Troon Drive SW Concord, NC 28027	Appointment:	07/17/18
	Term Expiring:	07/31/22
Connie Pilkinton* 25506 Millingport Road Locust, NC 28097	Appointment:	07/17/18
	Reappointment:	07/21/20
	Term Expiring:	07/31/24
Jacqueline Whitfield 520 Union Street S Concord, NC 28025	Appointment:	07/17/18
	Term Expiring:	07/31/22
Amanda Wilkerson 602 Sedgefield Street SW Concord, NC 28025	Appointment:	07/17/18
	Term Expiring:	07/31/22
Blake Kiger P.O. Box 707 Concord, NC 28026	Appointment:	07/17/18
	Term Expiring:	07/31/22
Waynett Taylor* 1333 Jake Alexander Blvd. Salisbury, NC 28146	Appointment:	10/15/18
	Term Expiring:	10/31/22

Note: At the July 17, 2018 Board of Commissioners' meeting, the Board revised membership of the Early Childhood Task Force Advisory Board to be added as needed.

\* An exception to the "residency" provision of the Appointment Policy was granted.

Early Childhood Task Force Advisory Board  
Applications on File  
January 12, 2021

Jennifer Baucom	4000 Grand Summit Boulevard	Concord, NC 28027
Marcella Beam*	300 Mooresville Road	Kannapolis, NC 28081
Andrea Bonds	1410 Moss Creek Drive	Harrisburg, NC 28075
Carla Brown*	P.O. Box 707	Concord, NC 28026
Erik Byker	7779 Windsor Forest Place	Harrisburg, NC 28075
Deborah Caldwell	1308 Mistletoe Ridge Place NW	Concord, NC 28027
Justina Clemmons	9948 Clarkes View Place NW	Concord, NC 28027
John Cox	1542 Suther Road	Concord, NC 28025
Stephanie Fish	750 Williamsburg Court NE	Concord, NC 28025
Catherine Hardwick*	8211 Chesthunt Place Drive	Charlotte, NC 28262
Latrese Hope	2402 Kannapolis Highway	Concord, NC 28027
Chris Jarrett	4258 Highway 49 South, Unit 584	Harrisburg, NC 28075
Lauren Jerome	6146 Gordon Lane	Harrisburg, NC 28075
Mandee LaCroix	3044 Champion Lane SW	Concord, NC 28025
Monica Long	3714 Ayrshire Court	Harrisburg, NC 28075
Jessie Napoli	1130 Piney Church Road	Concord, NC 28025
Jennifer Threadgill	93 Mary Circle	Concord, NC 28025
Kevin Vinson	P.O. Box 8012	Concord, NC 28027

\*An exception to the residency provision of the Appointment Policy will be needed.

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Appointments and Removals - Industrial Facilities and Pollution Control Financing Authority

### **BRIEF SUMMARY:**

The terms for Danny Fesperman and Robert Link on the Industrial Facilities and Pollution Control Financing Authority end February 28, 2021. Mr. Fesperman would like to serve another term. Terms are for six years. An exception to the length of service provision of the Appointment Policy will be needed. Mr. Link is not able to serve another term. It is requested to remove his name from the roster.

An application is on file for Michael Benson. He is recommended to be appointed to fill the position vacated by Mr. Link.

The Authority meets on an as-needed basis and the County Attorney serves as the contact for this Authority.

### **REQUESTED ACTION:**

Motion to reappoint Danny Fesperman to the Industrial Facilities and Pollution Control Financing Authority for a six-year term ending February 28, 2027; including an exception to the length of service provision of the Appointment Policy.

Motion to remove Robert Link from the Industrial Facilities and Pollution Control Financing Authority roster and thank him for his service.

Motion to appoint Michael Benson to the Industrial Facilities and Pollution Control Financing Authority for a six-year term ending February 28, 2027.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Lauren Linker, Clerk to the Board

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Roster
- ▣ Applications on File





# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Appointments and Removals - Mental Health Advisory Board

### **BRIEF SUMMARY:**

Several terms of Mental Health Advisory Board members expired December 31st. The following members are recommended to be reappointed to serve another term: Van Shaw, Terry Spry, Amy Jewell, Karen Calhoun, Georgia Lozier and David Wall. Ms. Calhoun and Mr. Wall do not reside in Cabarrus County. An exception to the residency provision of the Appointment Policy will be needed for them.

Additionally, Midland Mayor John Crump is stepping down from his position. Darren Hartsell is recommended to be appointed to fill the Midland Mayor/City Council position on the Advisory Board.

### **REQUESTED ACTION:**

Motion to reappoint Van Shaw, Terry Spry, Amy Jewell, Karen Calhoun, Georgia Lozier and David Wall to the Mental Health Advisory Board for three-year terms ending December 31, 2023; including an exception to the residency provision of the Appointment Policy for Ms. Calhoun and Mr. Wall.

Motion to remove John Crump from the Mental Health Advisory Board roster and thank him for his service.

Motion to appoint Darren Hartsell to the Mental Health Advisory Board for a three-year term ending December 31, 2023.

### **EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Jodi Ramirez, Law Enforcement Liaison/Project Administration  
Lauren Linker, Clerk to the Board

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Roster
- ▣ Applications on File

MENTAL HEALTH ADVISORY BOARD

26-Member Board

<u>PRIMARY MEMBER</u>	<u>SECONDARY</u>	<u>REPRESENTING</u>	<u>TERM OF APPOINTMENT</u>	
Ashlie Shanley 77 Union Street S Concord, NC 28025	Beth Street	District Attorney's Office	APPOINTMENT:	03/20/17
			REAPPOINTMENT:	01/21/20
			TERM EXPIRING:	12/31/21
Christy Wilhelm P.O. Box 70 Concord, NC 28026	Steve Grossman	Local Judge	APPOINTMENT:	12/17/18
			TERM EXPIRING:	12/31/20
H. Jay White, Sr. 5601 Meadow Bluff Ct. Concord, NC 28027		Local Attorney	APPOINTMENT:	08/21/17
			REAPPOINTMENT:	01/21/20
			TERM EXPIRING:	12/31/21
Mitzi Quinn 2550 Walker Road Mt. Pleasant, NC 28124	Alice Lawson	NC DPS - Adult Probation & Department of Juvenile Justice	APPOINTMENT: (unexpired)	06/19/17
			REAPPOINTMENT:	01/21/20
			TERM EXPIRING:	12/31/21
Van Shaw P.O. Box 707 Concord, NC 28026	Laura Heggins	Cabarrus County Sheriff's Office	APPOINTMENT:	12/17/18
			TERM EXPIRING:	12/31/20
Gary Gacek 41 Cabarrus Avenue W Concord, NC 28025	Keith Eury	Concord Police Department	APPOINTMENT:	03/20/17
			REAPPOINTMENT:	02/17/20
			TERM EXPIRING:	12/31/21
Terry Spry 401 Laureate Way Kannapolis, NC 28081	Daniel Wallace	Kannapolis Police Department	APPOINTMENT:	12/17/18
			TERM EXPIRING:	12/31/20
Barbara Strang PO Box 707 Concord, NC 28026		County Commissioner	APPOINTMENT:	12/21/20
			TERM EXPIRING:	12/31/21
William Dusch P.O. Box 308 Concord, NC 28026	Lloyd Payne	Mayor/City Council Concord	APPOINTMENT: (unexpired)	02/19/18
			REAPPOINTMENT:	01/21/20
			TERM EXPIRING:	12/31/21

Steve Sciascia P.O. Box 100 Harrisburg, NC 28075	Diamond Staton- Williams	Mayor/City Council Harrisburg	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	03/20/17 12/17/18 12/31/20
Darrell Hinnant 401 Laureate Way Kannapolis, NC 28081	Mike Legg	Mayor/City Council Kannapolis	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	03/20/17 02/17/20 12/31/21
John Crump P.O. Box 589 Midland, NC 28107	Darren Hartsell	Mayor/City Council Midland	APPOINTMENT: (unexpired) REAPPOINTMENT: TERM EXPIRING:	09/18/17 12/17/18 12/31/20
Del Eudy P.O. Box 1017 Mt. Pleasant, NC 28124	Randy Holloway	Mayor/City Council Mount Pleasant	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	03/20/17 01/21/20 12/31/21
Amy Jewell 9287 Naron Lane Harrisburg, NC 28075	John Basilice	Cabarrus County Schools	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	03/20/17 12/17/18 12/31/20
Jessica Grant 818 Waverly Court NE Concord, NC 28025		Kannapolis City Schools	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	03/20/17 02/17/20 12/31/21
Melissa Marshburn 15535 Laverack Lane Davidson, NC 28036	LaKeisha McCormick	Cardinal Innovations Health Care	APPOINTMENT: (unexpired) TERM EXPIRING:	09/16/19 12/31/20
Erin Shoe 1255 Giverny Court NW Concord, NC 28027	Marcella Beam	Cabarrus Health Alliance	APPOINTMENT: TERM EXPIRING:	01/21/20 12/31/21
Karen Calhoun* DHS 1303 S Cannon Blvd. Kannapolis, NC 28083	Cheryl Harris	Department of Human Services	APPOINTMENT: (unexpired) REAPPOINTMENT: TERM EXPIRING:	02/19/18 12/17/18 12/31/20
Rebecca True 284 Executive Park Dr. Suite 100 Concord, NC 28025	Jean Tillman	Local Providers	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	03/20/17 01/21/20 12/31/21
Tri Tang (CHS) 920 Church Street N Concord, NC 28025	Jessica Castrodale	Local Providers	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	03/20/17 12/17/18 12/31/20

Dr. Roderick Lilly P.O. Box 49003 Charlotte, NC 28277	Local Psychologist	APPOINTMENT: 06/19/17 REAPPOINTMENT: 01/21/20 TERM EXPIRING: 12/31/21
Jon McKinsey 892 Craigmont Lane NW Concord, NC 28027	Local Psychiatrist	APPOINTMENT: 03/20/17 REAPPOINTMENT: 01/21/20 TERM EXPIRING: 12/31/21
Justin Brines 793 Crestmont Drive Concord, NC 28025	Jimmy Lentz Emergency Medical Services	APPOINTMENT: 06/18/18 REAPPOINTMENT: 06/15/20 TERM EXPIRING: 06/30/22
Georgia Lozier 14 Union Street N #306 Concord, NC 28025	At-large	APPOINTMENT: 03/20/17 REAPPOINTMENT: 12/17/18 TERM EXPIRING: 12/31/20
Alan Thompson 3688 Camp Julia Road Kannapolis, NC 28083	At-large	APPOINTMENT: 03/20/17 REAPPOINTMENT: 01/21/20 TERM EXPIRING: 12/31/21
David Wall*^ 415 N Bruton Drive Candor, NC 27229	Gayle Alston At-large	APPOINTMENT: 06/19/17 (unexpired) REAPPOINTMENT: 12/17/18 TERM EXPIRING: 12/31/20

The Mental Health Advisory Board was created per a resolution adopted by the Board of Commissioners on October 17, 2016.

An Emergency Medical Services position was added to the roster by Board approval on June 18, 2018.

\*Exception to the "residency" provision of the Appointment Policy.

^Exception to the "service on multiple boards" provision of the Appointment Policy

## MENTAL HEALTH ADVISORY BOARD

Applications on File  
January 15, 2021

Jaclyn Berry		419 Summerlake Drive SW	Concord, NC 28025
Deborah Caldwell		1308 Mistletoe Ridge Place NW	Concord, NC 28027
Karen Calhoun*	Current Member	13 03 S Cannon Boulevard	Kannapolis, NC 28083
Keisha Daniels		653 Wilson Street	Kannapolis, NC 28083
Ian Freeze		5813 Stratford Court	Harrisburg, NC 28075
Kimberly Grant-Flythe		3288 Oulten Street SW	Concord, NC 28027
Darren Hartsell		14001 Cabarrus Station Road	Midland, NC 28107
Chris Jarrett^		4258 Highway 49 S, Unit 584	Harrisburg, NC 28075
Amy Jewell	Current Member	9287 Naron Lane	Harrisburg, NC 28075
Jenny Kirwin		9339 Cub Run Drive	Concord, NC 28027
Georgia Lozier	Current Member	14 Union Street N #306	Concord, NC 28025
Jessie Napoli		1130 Piney Church Road	Concord, NC 28025
Wendy Pascual		1362 Haestad Court	Concord, NC 28025
Jose Reyes*		6208 Underwood Avenue	Charlotte, NC 28213
David Roundtree		6186 Roseway Court	Harrisburg, NC 28075
Van Shaw	Current Member	P.O. Box 707	Concord, NC 28026
Kimberly Shipp		P.O. Box 1905	Kannapolis, NC 28082
Terry Spry	Current Member	401 Laureate Way	Kannapolis, NC 28081
Kevin Vinson		P.O. Box 8012	Concord, NC 28027
David Wall*^	Current Member	415 N Bruton Drive	Candor, NC 27229

\*An exception to the residency provision of the Appointment Policy is needed.

^An exception to the service on multiple boards provision of the Appointment Policy is needed.

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Consent Agenda

**SUBJECT:**

County Manager - Central Area Plan Inter-local Agreement Modification

**BRIEF SUMMARY:**

The City of Concord has received a request for connection to public water service within an area that is restricted by the City/County agreement for the Central Area Plan. An Ad Hoc Modification of that agreement is necessary for this parcel to be approved for that service.

**REQUESTED ACTION:**

Motion to approve the Ad Hoc Modification of the Central Area Land Use Plan Agreement between Cabarrus County and the City of Concord; and authorize the County Manager to execute the contract on behalf of Cabarrus County, subject to review or revisions by the County Attorney.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Jonathan B. Marshall, Deputy County Manager

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Ad Hoc Modification
- ▣ Map of property

STATE OF NORTH CAROLINA  
COUNTY OF CABARRUS

AD HOC MODIFICATION OF CITY  
OF THE CONCORD-CABARRUS COUNTY  
INTERLOCAL AGREEMENT REGARDING  
THE CENTRAL AREA PLAN  
( )

This AD HOC MODIFICATION OF THE CONCORD-CABARRUS COUNTY INTERLOCAL AGREEMENT REGARDING THE CENTRAL AREA PLAN (“the “Modification”) is entered into effective as of the last date of execution by the parties as shown below, by, between and among the CITY OF CONCORD (“Concord”), a North Carolina municipal corporation, and CABARRUS COUNTY (“County”).

### RECITALS

1. On June 28, 2008, these same parties entered into an “Interlocal Agreement” regarding the implementation of the Central Area Plan (“CAP”).
2. This Interlocal Agreement was to continue in effect for a period of 15 years and contemplated a review of the efficacy of the Interlocal Agreement every 5 years.
3. The parties have had discussions about specific issues and parcels affected by the CAP since the execution of the Interlocal Agreement.
4. The parties have also had specific discussions about a parcel owned by Nelson Vasquez Ortiz, who wishes to construct a new single family home on the parcel, which is located in Area A of the Interlocal Agreement. Pursuant to the terms of the Interlocal Agreement, the CAP prohibits Concord from extending utilities to real property parcels in Area A.
5. The CAP and the Interlocal Agreement have been successful in redirecting residential development into other areas of Cabarrus County, but there are instances in the Central Area in which it makes sense to modify the Interlocal Agreement to allow a limited amount of development in areas where utilities already exist or are reasonably available.
6. The purpose of this Amendment is to modify the Interlocal Agreement to the limited extent of addressing the above-described circumstance involving the below identified parcel(s).

In consideration of the above Recitals and the Terms below, which the parties specifically acknowledge and agree make this Modification legally binding and enforceable, the parties agree as provided below.

### TERMS

1. Concord agrees to provide electric and water utility services under its normal and customary terms and conditions to the property located at 3519 Katrina Avenue (PIN 5641-70-5535).
2. Except as specifically changed by this Modification, the provisions of the Interlocal Agreement shall remain in full force and effect.

IN WITNESS, the parties have executed this Modification as indicated below, all pursuant to legal authority duly given.

CITY OF CONCORD

By: \_\_\_\_\_  
Lloyd Payne, City Manager

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

CABARRUS COUNTY

By: \_\_\_\_\_  
Mike Downs, County Manager

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

4813-2804-1077, v. 1

DRAFT

# Proposed Amendment to CALUP ILA

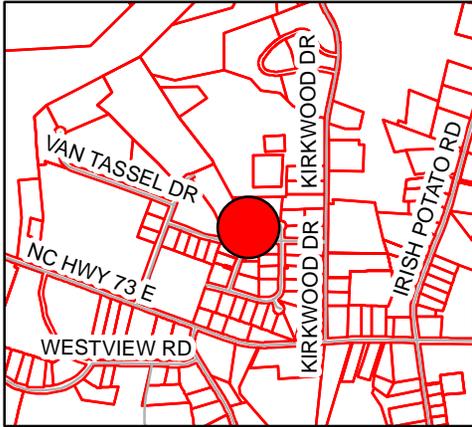
## 3519 Katrina Avenue

### PIN 5641-70-5535



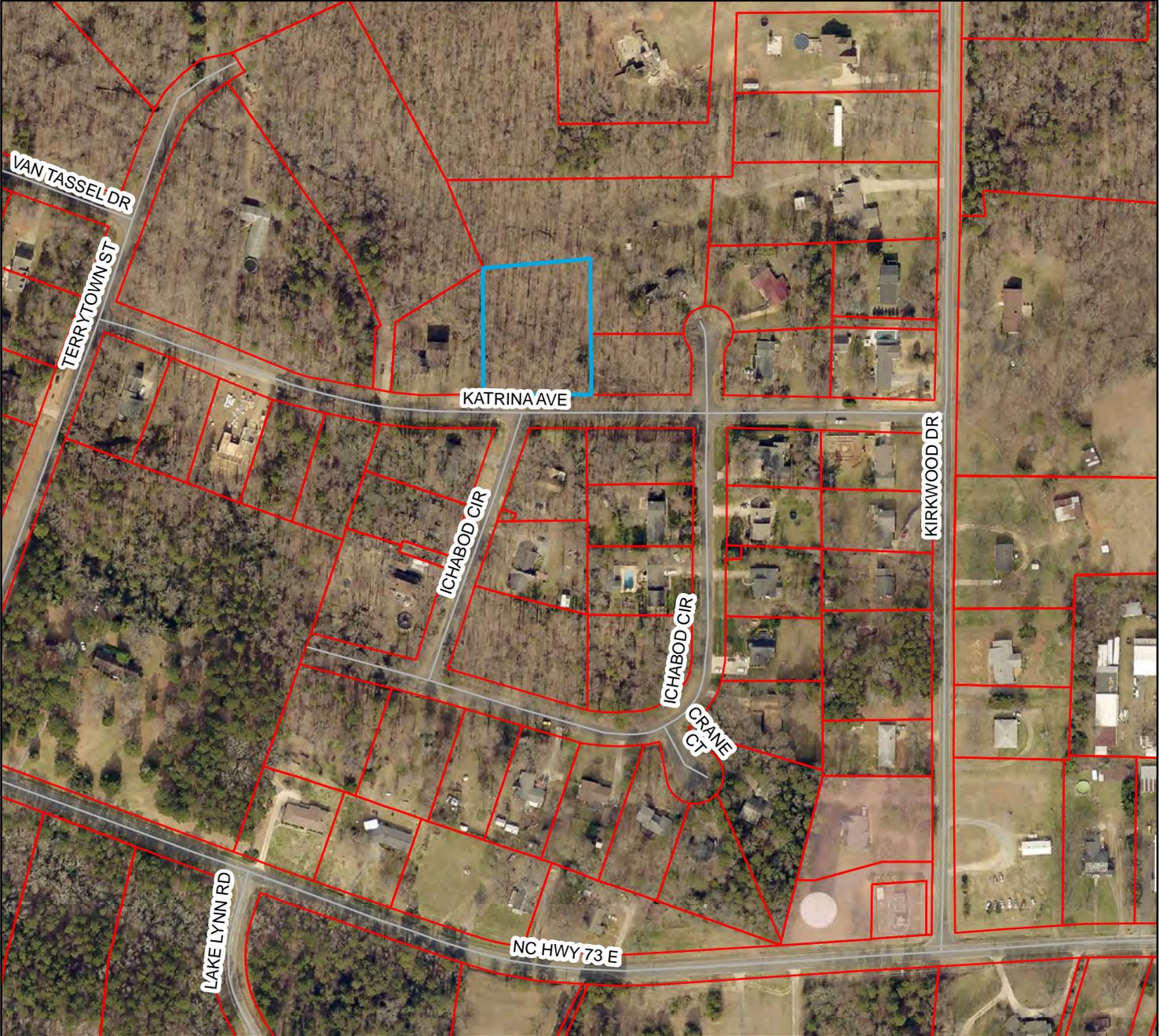
**Legend**

- Subject Property
- TaxParcels
- CITY OF CONCORD



Cabarrus County shall not be held liable for any errors in this data. This includes errors of omission, commission, errors concerning the content of the data, and relative and positional accuracy of the data. These data cannot be construed to be a legal document. Primary sources from which these data were compiled must be consulted for verification of information contained within the data.

Map Prepared by Cabarrus County Planning & Development - Jan 2020



# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

County Manager - Child Care Facility Partnership

### **BRIEF SUMMARY:**

In early 2020, All Saints Episcopal Church (ASEC) approached County staff about available space for child care at their facility. Since that time representatives from ASEC and the County, along with Rowan Cabarrus Community College (RCCC) and Marizetta Kerry have met to discuss a potential collaboration. The proposed facility would serve 79 children with 40 spots reserved for children of County employees.

The general framework is as follows:

1. ASEC would lease the space to Marizetta Kerry;
2. Marizetta Kerry would staff and operate a Five Star Center on the site;
3. RCCC would provide hands-on experience to students at the facility; and
4. The County would assist with initial startup costs and provide tuition assistance (50/50 cost share) to County employees who enroll their children at the facility.

### **REQUESTED ACTION:**

Motion to authorize the County Manager to enter into an agreement with Marizetta Kerry to provide initial startup funding and ongoing tuition assistance for County employees.

Motion to release \$675,581.75 from contingency to be used for one-time startup costs and ongoing tuition assistance for County employees.

### **EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Rodney Harris, Deputy County Manager

**BUDGET AMENDMENT REQUIRED:**

Yes

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▢ Budget Amendment

## Budget Revision/Amendment Request

Date:

Amount:

Dept. Head:

Department:

Internal Transfer Within Department     
  Transfer Between Departments/Funds     
  Supplemental Request

Transfer contingency funds for Marizetta Kerry MOU to provide initial startup costs and child care tuition assistance for County employees

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	9	00191910-9660	Contingency	1,527,031.75		675,581.75	851,450.00
001	9	00191210-9570	Service Contracts		223,000.00		223,000.00
001	9	00191210-963701	Child Care Tuition Assistance	-	452,581.75		675,581.75

**Budget Officer**

Approved  
 Denied

**County Manager**

Approved  
 Denied

**Board of Commissioners**

Approved  
 Denied

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

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

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

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

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

County Manager - Purchase of Property for the Northeast Cabarrus Public Safety Communications Towers

### **BRIEF SUMMARY:**

The County has budgeted for the purchase of property to construct a northeastern Cabarrus Public Safety Communications Tower. This tower has been proposed to address poor public safety communication service in the eastern and northeastern parts of the County. An approximately 14 acre site has been identified near the intersection of Gold Hill Road East and Short Cut Road for this purpose. A purchase price within the budgeted amount has been negotiated with the property owner. This request is for approval of a contract to purchase that will include a due diligence to complete the site specific planning for this tower.

### **REQUESTED ACTION:**

Motion to approve the purchase contract between Cabarrus County and Tracy and Carol Talley; and authorize the County Manager to execute the contract on behalf of Cabarrus County, subject to review or revisions by the County Attorney.

### **EXPECTED LENGTH OF PRESENTATION:**

### **SUBMITTED BY:**

Jonathan B. Marshall, Deputy County Manager  
Travis McGhee, Network Engineer County Sheriff's Office

### **BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Purchase Contract
- ▣ Property Map

**OFFER TO PURCHASE AND CONTRACT - VACANT LOT/LAND**  
**[Consult "Guidelines" (Form 12G) for guidance in completing this form]**

**NOTE:** This contract is intended for unimproved real property that Buyer will purchase only for personal use and does not have immediate plans to subdivide. It should not be used to sell property that is being subdivided unless the property has been platted, properly approved and recorded with the register of deeds as of the date of the contract. If Seller is Buyer's builder and the sale involves the construction of a new single family dwelling prior to closing, use the standard Offer to Purchase and Contract--New Construction (Form 800-T) or, if the construction is completed, use the Offer to Purchase and Contract (Form 2-T) with the New Construction Addendum (Form 2A3-T).

For valuable consideration, the receipt and legal sufficiency of which are hereby acknowledged, Buyer offers to purchase and Seller upon acceptance agrees to sell and convey the Property on the terms and conditions of this Offer To Purchase and Contract and any addendum or modification made in accordance with its terms (together the "Contract").

**1. TERMS AND DEFINITIONS:** The terms listed below shall have the respective meaning given them as set forth adjacent to each term.

(a) **"Seller":** Tracy W Talley, Carol A Talley

(b) **"Buyer":** Cabarrus County

(c) **"Property":** The Property shall include all that real estate described below together with all appurtenances thereto including the improvements located thereon.

**NOTE:** If the Property will include a manufactured (mobile) home(s), Buyer and Seller should consider including the Manufactured (Mobile) Home provision in the Additional Provisions Addendum (Standard Form 2A11-T) with this offer.

Street Address: 4300-4400 Gold Hill Rd E  
 City: Gold Hill Zip: 28071  
 County: Cabarrus, North Carolina

**NOTE:** Governmental authority over taxes, zoning, school districts, utilities and mail delivery may differ from address shown.

Legal Description: (Complete ALL applicable)  
 Plat Reference :Lot/Unit \_\_\_\_\_, Block/Section \_\_\_\_\_, Subdivision/Condominium \_\_\_\_\_, as shown on Plat Book/Slide \_\_\_\_\_ at Page(s) \_\_\_\_\_

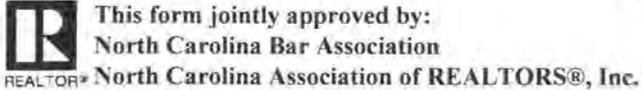
The PIN/PID or other identification number of the Property is: 66031187290000 and 66031282500000

Other description: 13.62 acres

Some or all of the Property may be described in Deed Book \_\_\_\_\_ at Page \_\_\_\_\_

(d) **"Purchase Price":**

\$ <u>139,000.00</u>	paid in U.S. Dollars upon the following terms:
\$ <u>2,000.00</u>	BY DUE DILIGENCE FEE made payable and delivered to Seller by the Effective Date.
\$ <u>8,000.00</u>	BY INITIAL EARNEST MONEY DEPOSIT made payable and delivered to Escrow Agent named in Paragraph 1(f) by <input checked="" type="checkbox"/> cash <input type="checkbox"/> personal check <input type="checkbox"/> official bank check <input type="checkbox"/> wire transfer, <input type="checkbox"/> electronic transfer, EITHER <input type="checkbox"/> with this offer OR <input type="checkbox"/> within five (5) days of the Effective Date of this Contract.
\$ _____	BY (ADDITIONAL) EARNEST MONEY DEPOSIT made payable and delivered to Escrow Agent named in Paragraph 1(f) by cash, official bank check, wire transfer or electronic transfer no later than 5 p.m. on _____, <b>TIME BEING OF THE ESSENCE.</b>
\$ _____	BY ASSUMPTION of the unpaid principal balance and all obligations of Seller on the existing loan(s) secured by a deed of trust on the Property in accordance with the attached Loan Assumption Addendum (Standard Form 2A6-T).
\$ _____	BY SELLER FINANCING in accordance with the attached Seller Financing Addendum (Standard Form 2A5-T).
\$ <u>129,000.00</u>	BALANCE of the Purchase Price in cash at Settlement (some or all of which may be paid with the proceeds of a new loan).



**STANDARD FORM 12-T**  
 Revised 7/2020  
 © 7/2020

Buyer initials \_\_\_\_\_ Seller initials \_\_\_\_\_

Should Buyer fail to deliver either the Due Diligence Fee or any Initial Earnest Money Deposit by their due dates, or should any check or other funds paid by Buyer be dishonored, for any reason, by the institution upon which the payment is drawn, Buyer shall have one (1) banking day after written notice to deliver cash, official bank check, wire transfer or electronic transfer to the payee. In the event Buyer does not timely deliver the required funds, Seller shall have the right to terminate this Contract upon written notice to Buyer.

(e) **"Earnest Money Deposit"**: The Initial Earnest Money Deposit, the Additional Earnest Money Deposit and any other earnest monies paid or required to be paid in connection with this transaction, collectively the "Earnest Money Deposit", shall be deposited and held in escrow by Escrow Agent until Closing, at which time it will be credited to Buyer, or until this Contract is otherwise terminated. In the event: (1) this offer is not accepted; or (2) a condition of any resulting contract is not satisfied, then the Earnest Money Deposit shall be refunded to Buyer. In the event of breach of this Contract by Seller, the Earnest Money Deposit shall be refunded to Buyer upon Buyer's request, but such return shall not affect any other remedies available to Buyer for such breach. In the event of breach of this Contract by Buyer, the Earnest Money Deposit shall be paid to Seller. The payment of the Earnest Money Deposit to Seller and the retention of any Due Diligence Fee by Seller (without regard to their respective amounts, including zero) together shall serve as liquidated damages ("Liquidated Damages") and as Seller's sole and exclusive remedy for such breach, but without limiting Seller's rights under Paragraphs 4(d) and 4(e) for damage to the Property. It is acknowledged by the parties that the amount of the Liquidated Damages is compensatory and not punitive, such amount being a reasonable estimation of the actual loss that Seller would incur as a result of a breach of this Contract by Buyer. The payment to Seller and/or retention by Seller of the Liquidated Damages shall not constitute a penalty or forfeiture but actual compensation for Seller's anticipated loss, both parties acknowledging the difficulty determining Seller's actual damages for such breach. If legal proceedings are brought by Buyer or Seller against the other to recover the Earnest Money Deposit, the prevailing party in the proceeding shall be entitled to recover from the non-prevailing party reasonable attorney fees and court costs incurred in connection with the proceeding.

(f) **"Escrow Agent"** (insert name): Law offices of Richard Koch

Buyer and Seller consent to disclosure by the Escrow Agent of any material facts pertaining to the Earnest Money Deposit to the parties to this transaction, their real estate agent(s) and Buyer's lender(s).

**NOTE:** In the event of a dispute between Seller and Buyer over the disposition of the Earnest Money Deposit held in escrow, a licensed real estate broker ("Broker") is required by state law (and Escrow Agent, if not a Broker, hereby agrees) to retain the Earnest Money Deposit in the Escrow Agent's trust or escrow account until Escrow Agent has obtained a written release from the parties consenting to its disposition or until disbursement is ordered by a court of competent jurisdiction. Alternatively, if a Broker or an attorney licensed to practice law in North Carolina ("Attorney") is holding the Earnest Money Deposit, the Broker or Attorney may deposit the disputed monies with the appropriate clerk of court in accordance with the provisions of N.C.G.S. §93A-12.

THE PARTIES AGREE THAT A REAL ESTATE BROKERAGE FIRM ACTING AS ESCROW AGENT MAY PLACE THE EARNEST MONEY DEPOSIT IN AN INTEREST BEARING TRUST ACCOUNT AND THAT ANY INTEREST EARNED THEREON SHALL BE DISBURSED TO THE ESCROW AGENT MONTHLY IN CONSIDERATION OF THE EXPENSES INCURRED BY MAINTAINING SUCH ACCOUNT AND RECORDS ASSOCIATED THEREWITH.

(g) **"Effective Date"**: The date that: (1) the last one of Buyer and Seller has signed or initialed this offer or the final counteroffer, if any, and (2) such signing or initialing is communicated to the party making the offer or counteroffer, as the case may be. The parties acknowledge and agree that the initials lines at the bottom of each page of this Contract are merely evidence of their having reviewed the terms of each page, and that the complete execution of such initials lines shall not be a condition of the effectiveness of this Agreement.

(h) **"Due Diligence"**: Buyer's opportunity to investigate the Property and the transaction contemplated by this Contract, including but not necessarily limited to the matters described in Paragraph 2 below, to decide whether Buyer, in Buyer's sole discretion, will proceed with or terminate the transaction.

(i) **"Due Diligence Fee"**: A negotiated amount, if any, paid by Buyer to Seller with this Contract for Buyer's right to terminate the Contract for any reason or no reason during the Due Diligence Period. It shall be the property of Seller upon the Effective Date and shall be a credit to Buyer at Closing. The Due Diligence Fee shall be non-refundable except in the event of a material breach of this Contract by Seller, or if this Contract is terminated under Paragraph 6(n) or as otherwise provided in any addendum hereto. Buyer and Seller each expressly waive any right that they may have to deny the right to conduct Due Diligence or to assert any defense as to the enforceability of this Contract based on the absence or alleged insufficiency of any Due Diligence Fee, it being the intent of the parties to create a legally binding contract for the purchase and sale of the Property without regard to the existence or amount of any Due Diligence Fee.

(j) **"Due Diligence Period"**: The period beginning on the Effective Date and extending through 5:00 p.m. on **180 days from the Effective Date** **TIME BEING OF THE ESSENCE.**

(k) **"Settlement"**: The proper execution and delivery to the closing attorney of all documents necessary to complete the transaction contemplated by this Contract, including the deed, settlement statement, deed of trust and other loan or conveyance documents, and the closing attorney's receipt of all funds necessary to complete such transaction.

(l) **"Settlement Date"**: The parties agree that Settlement will take place on **30 days from expiration of Due Diligence period** (the "Settlement Date"), unless otherwise agreed in writing, at a time and place designated by Buyer.

**NOTE:** See paragraph 9, **DELAY IN SETTLEMENT/CLOSING** for conditions under which Settlement may be delayed.

(m) **"Closing"**: The completion of the legal process which results in the transfer of title to the Property from Seller to Buyer, which includes the following steps: (1) the Settlement (defined above); (2) the completion of a satisfactory title update to the Property following the Settlement; (3) the closing attorney's receipt of authorization to disburse all necessary funds; and (4) recordation in the appropriate county registry of the deed(s) and deed(s) of trust, if any, which shall take place as soon as reasonably possible for the closing attorney after Settlement. Upon Closing, the proceeds of sale shall be disbursed by the closing attorney in accordance with the settlement statement and the provisions of Chapter 45A of the North Carolina General Statutes. If the title update should reveal unexpected liens, encumbrances or other title defects, or if the closing attorney is not authorized to disburse all necessary funds, then the Closing shall be suspended and the Settlement deemed delayed under Paragraph 9 (Delay in Settlement/Closing).

**WARNING:** The North Carolina State Bar has determined that the performance of most acts and services required for a closing constitutes the practice of law and must be performed only by an attorney licensed to practice law in North Carolina. State law prohibits unlicensed individuals or firms from rendering legal services or advice. Although non-attorney settlement agents may perform limited services in connection with a closing, they may not perform all the acts and services required to complete a closing. A closing involves significant legal issues that should be handled by an attorney. Accordingly it is the position of the North Carolina Bar Association and the North Carolina Association of REALTORS® that all buyers should hire an attorney licensed in North Carolina to perform a closing.

(n) **"Special Assessments"**: A charge against the Property by a governmental authority in addition to ad valorem taxes and recurring governmental service fees levied with such taxes, or by an owners' association in addition to any regular assessment (dues), either of which may be a lien against the Property. A Special Assessment may be either proposed or confirmed.

**"Proposed Special Assessment"**: A Special Assessment that is under formal consideration but which has not been approved prior to Settlement.

**"Confirmed Special Assessment"**: A Special Assessment that has been approved prior to Settlement whether payable in a lump sum or future installments.

**NOTE:** Any Proposed and Confirmed Special Assessments must be identified by Seller in paragraph 5(b), and Buyer's and Seller's respective responsibilities for Proposed and Confirmed Special Assessments are addressed in paragraphs 4(a) and 6(k).

## 2. BUYER'S DUE DILIGENCE PROCESS:

**WARNING:** BUYER IS STRONGLY ENCOURAGED TO CONDUCT DUE DILIGENCE DURING THE DUE DILIGENCE PERIOD. If Buyer is not satisfied with the results or progress of Buyer's Due Diligence, Buyer should terminate this Contract, *prior to the expiration of the Due Diligence Period*, unless Buyer can obtain a written extension from Seller. SELLER IS NOT OBLIGATED TO GRANT AN EXTENSION. Although Buyer may continue to investigate the Property following the expiration of the Due Diligence Period, Buyer's failure to deliver a Termination Notice to Seller prior to the expiration of the Due Diligence Period will constitute a waiver by Buyer of any right to terminate this Contract based on any matter relating to Buyer's Due Diligence. Provided however, following the Due Diligence Period, Buyer may still exercise a right to terminate if Seller fails to materially comply with any of Seller's obligations under paragraph 6 of this Contract or for any other reason permitted under the terms of this Contract or North Carolina law.

(a) **Loan:** Buyer, at Buyer's expense, shall be entitled to pursue qualification for and approval of the Loan if any.

**NOTE:** Buyer's obligation to purchase the Property is not contingent on obtaining a Loan. Therefore, Buyer is advised to consult with Buyer's lender prior to signing this offer to assure that the Due Diligence Period allows sufficient time for the appraisal to be completed and for Buyer's lender to provide Buyer sufficient information to decide whether to proceed with or terminate the transaction.

(b) **Property Investigation:** Buyer or Buyer's agents or representatives, at Buyer's expense, shall be entitled to conduct all desired tests, surveys, appraisals, investigations, examinations and inspections of the Property as Buyer deems appropriate, including but NOT limited to the following:

- (i) **Soil And Environmental:** Reports to determine whether the soil is suitable for Buyer's intended use and whether there is any environmental contamination, law, rule or regulation that may prohibit, restrict or limit Buyer's intended use.
- (ii) **Septic/Sewer System:** Any applicable investigation(s) to determine: (1) the condition of an existing sewage system, (2) the costs and expenses to install a sewage system approved by an existing Improvement Permit, (3) the availability and expense to connect to a public or community sewer system, and/or (4) whether an Improvement Permit or written evaluation may be obtained from the County Health Department for a suitable ground absorption sewage system.
- (iii) **Water:** Any applicable investigation(s) to determine: (1) the condition of an existing private drinking water well, (2) the costs and expenses to install a private drinking water well approved by an existing Construction Permit, (3) the availability, costs and expenses to connect to a public or community water system, or a shared private well, and/or (4) whether a Construction Permit may be obtained from the County Health Department for a private drinking water well.
- (iv) **Review of Documents:** Review of the Declaration of Restrictive Covenants, Bylaws, Articles of Incorporation, Rules and Regulations, and other governing documents of any applicable owners' association and/or subdivision. If the Property is subject to regulation by an owners' association, it is recommended that Buyer review the completed Owners' Association And Addendum (Standard Form 2A12-T) provided by Seller prior to signing this offer. It is also recommended that the Buyer determine if the owners' association or its management company charges fees for providing information required by Buyer's lender or confirming restrictive covenant compliance.
- (v) **Appraisals:** An appraisal of the Property.
- (vi) **Survey:** A survey to determine whether the property is suitable for Buyer's intended use and the location of easements, setbacks, property boundaries and other issues which may or may not constitute title defects.
- (vii) **Zoning and Governmental Regulation:** Investigation of current or proposed zoning or other governmental regulation that may affect Buyer's intended use of the Property, adjacent land uses, planned or proposed road construction, and school attendance zones.
- (viii) **Flood Hazard:** Investigation of potential flood hazards on the Property, and/or any requirement to purchase flood insurance in order to obtain the Loan.
- (ix) **Utilities and Access:** Availability, quality, and obligations for maintenance of utilities including electric, gas, communication services, storm water management, and means of access to the Property and amenities.
- (x) **Streets/Roads:** Investigation of the status of the street/road upon which the Property fronts as well as any other street/road used to access the Property, including: (1) whether any street(s)/road(s) are public or private, (2) whether any street(s)/road(s) designated as public are accepted for maintenance by the State of NC or any municipality, or (3) if private or not accepted for public maintenance, the consequences and responsibility for maintenance and the existence, terms and funding of any maintenance agreements.

**NOTE:** NC General Statutes Section 136-102.6(f) (the "Statute") requires that under circumstances described in the Statute, a buyer must be provided a subdivision streets disclosure statement prior to entering into an agreement to buy subdivided property described in the Statute. If Buyer or Seller are uncertain whether the sale of the Property described in this Contract is subject to the Statute, consult a NC real estate attorney.

- (xi) **Sale/Lease of Existing Property:** As noted in paragraph 3(b), this Contract is not conditioned upon the sale/lease or closing of other property owned by Buyer. Therefore, if Buyer must sell or lease other real property in order to qualify for a new loan or to otherwise complete the purchase of the Property, Buyer should seek to close on Buyer's other property prior to the end of the Due Diligence Period or be reasonably satisfied that closing on Buyer's other property will take place prior to the Settlement Date of this Contract.

(c) **Buyer's Obligation to Repair Damage:** Buyer shall, at Buyer's expense, promptly repair any damage to the Property resulting from any activities of Buyer and Buyer's agents and contractors, but Buyer shall not be responsible for any damage caused by accepted practices applicable to any N.C. licensed professional performing reasonable appraisals, tests, surveys, examinations and inspections of the Property. This repair obligation shall survive any termination of this Contract.

(d) **Indemnity:** Buyer will indemnify and hold Seller harmless from all loss, damage, claims, suits or costs, which shall arise out of any contract, agreement, or injury to any person or property as a result of any activities of Buyer and Buyer's agents and contractors relating to the Property except for any loss, damage, claim, suit or cost arising out of pre-existing conditions of the Property and/or out of Seller's negligence or willful acts or omissions. This indemnity shall survive this Contract and any termination hereof.

(e) **Buyer's Right to Terminate:** Buyer shall have the right to terminate this Contract for any reason or no reason, by delivering to Seller written notice of termination (the "Termination Notice") during the Due Diligence Period (or any agreed-upon written extension of the Due Diligence Period), **TIME BEING OF THE ESSENCE**. If Buyer timely delivers the Termination Notice, this Contract shall be terminated and the Earnest Money Deposit shall be refunded to Buyer.

(f) **CLOSING SHALL CONSTITUTE ACCEPTANCE OF THE PROPERTY IN ITS THEN EXISTING CONDITION UNLESS PROVISION IS OTHERWISE MADE IN WRITING.**

3. **BUYER REPRESENTATIONS:**

(a) **Loan:** Buyer  does  does not intend to obtain a new loan in order to purchase the Property. If Buyer is obtaining a new loan, Buyer intends to obtain a loan as follows:  Conventional  Other: \_\_\_\_\_ loan at a  Fixed Rate  Adjustable Rate in the principal amount of \_\_\_\_\_ for a term of \_\_\_\_\_ year(s), at an initial interest rate not to exceed \_\_\_\_\_ % per annum (the "Loan").

**NOTE:** Buyer's obligation under this Contract are not conditioned upon obtaining or closing any loan.

**NOTE:** If Buyer does not intend to obtain a new loan, Seller is advised, prior to signing this offer, to obtain documentation from Buyer which demonstrates that Buyer will be able to close on the Property without the necessity of obtaining a new loan.

(b) **Other Property:** Buyer  DOES  DOES NOT have to sell or lease other real property in order to qualify for a new loan or to complete the purchase. *(Complete the following only if Buyer DOES have to sell or lease other real property:)*

Other Property Address: \_\_\_\_\_

(Check if applicable) Buyer's other property IS under contract as of the date of this offer, and a copy of the contract has either been previously provided to Seller or accompanies this offer. *(Buyer may mark out any confidential information, such as the purchase price and the buyer's identity, prior to providing a copy of the contract to Seller.)* Failure to provide a copy of the contract shall not prevent this offer from becoming a binding contract; however, SELLER IS STRONGLY ENCOURAGED TO OBTAIN AND REVIEW THE CONTRACT ON BUYER'S PROPERTY PRIOR TO ACCEPTING THIS OFFER.

(Check if applicable) Buyer's other property IS NOT under contract as of the date of this offer. Buyer's property *(check only ONE of the following options):*

- is listed with and actively marketed by a licensed real estate broker.
- will be listed with and actively marketed by a licensed real estate broker.
- Buyer is attempting to sell/lease the Buyer's Property without the assistance of a licensed real estate broker.

**NOTE:** This Contract is NOT conditioned upon the sale/lease or closing of Buyer's other property. If the parties agree to make this Contract conditioned on a sale/lease or closing of Buyer's other property, an appropriate contingency addendum should be drafted by a North Carolina real estate attorney and added to this Contract.

(c) **Performance of Buyer's Financial Obligations:** To the best of Buyer's knowledge, there are no other circumstances or conditions existing as of the date of this offer that would prohibit Buyer from performing Buyer's financial obligations in accordance with this Contract, except as may be specifically set forth herein.

4. **BUYER OBLIGATIONS:**

(a) **Responsibility for Proposed Special Assessments:** Buyer shall take title subject to all Proposed Special Assessments.

(b) **Responsibility for Certain Costs:** Buyer shall be responsible for all costs with respect to:

- (i) any loan obtained by Buyer, including charges by an owners association and/or management company as agent of an owners' association for providing information required by Buyer's lender;
- (ii) charges required by an owners' association declaration to be paid by Buyer for Buyer's future use and enjoyment of the Property, including, without limitation, working capital contributions, membership fees, or charges for Buyer's use of the common elements and/or services provided to Buyer, such as "move-in fees";
- (iii) determining restrictive covenant compliance;
- (iv) appraisal;
- (v) title search;
- (vi) title insurance;
- (vii) any fees charged by the closing attorney for the preparation of the Closing Disclosure, Seller Disclosure and any other settlement statement;
- (viii) recording the deed; and
- (ix) preparation and recording of all instruments required to secure the balance of the Purchase Price unpaid at Settlement.

(c) **Authorization to Disclose Information:** Buyer authorizes the Buyer's lender(s), the parties' real estate agent(s) and closing attorney:(1) to provide this Contract to any appraiser employed by Buyer or by Buyer's lender(s); and (2) to release and disclose any buyer's closing disclosure, settlement statement and/or disbursement summary, or any information therein, to the parties to this transaction, their real estate agent(s) and Buyer's lender(s).

5. **SELLER REPRESENTATIONS:**

(a) **Ownership:** Seller represents that Seller:

- has owned the Property for at least one year.  
 has owned the Property for less than one year.  
 does not yet own the Property.

(b) **Assessments:** To the best of Seller's knowledge there  are  are not any Proposed Special Assessments. If any Proposed Special Assessments, identify: \_\_\_\_\_

Seller warrants that there  are  are not any Confirmed Special Assessments. If any Confirmed Special Assessments, identify: \_\_\_\_\_

**NOTE:** Buyer's and Seller's respective responsibilities for Proposed and Confirmed Special Assessments are addressed in paragraphs 4(a) and 6(k).

(c) **Owners' Association(s) and Dues:** To best of Seller's knowledge, ownership of the Property  subjects  does not subject Buyer to regulation by one or more owners' association(s) and governing documents, which impose various mandatory covenants, conditions and restrictions upon the Property and Buyer's enjoyment thereof, including but not limited to obligations to pay regular assessments (dues) and Special Assessments. If there is an owners' association, then an Owners' Association Disclosure and Addendum For Properties Exempt from Residential Property Disclosure Statement (Standard Form 2A12-T) shall be completed by Seller, at Seller's expense, and must be attached as an addendum to this Contract.

(d) **Sewage System Permit:** ( Applicable  Not Applicable) Seller warrants that the sewage system described in the Improvement Permit attached hereto has been installed, which representation survives Closing, but makes no further representations as to the system.

(e) **Private Drinking Water Well Permit:** ( Applicable  Not Applicable) Seller warrants that a private drinking water well has been installed, which representation survives Closing, but makes no further representations as to the well. (If well installed after July 1, 2008, attach Improvement Permit hereto.)

6. **SELLER OBLIGATIONS:**

(a) **Evidence of Title, Payoff Statement(s) and Non Foreign Status:**

- (i) Seller agrees to use best efforts to provide to the closing attorney as soon as reasonably possible after the Effective Date, copies of all title information in possession of or available to Seller, including but not limited to: title insurance policies, attorney's opinions on title, surveys, covenants, deeds, notes and deeds of trust, leases, and easements relating to the Property.  
(ii) Seller shall provide to the closing attorney all information needed to obtain a written payoff statement from any lender(s) regarding any security interest in the Property as soon as reasonably possible after the Effective Date, and Seller designates the closing attorney as Seller's agent with express authority to request and obtain on Seller's behalf payoff statements and/or short-pay statements from any such lender(s).  
(iii) If Seller is not a foreign person as defined by the Foreign Investment in Real Property Tax Act, Seller shall also provide to the closing attorney a non-foreign status affidavit (pursuant to the Foreign Investment in Real Property Tax Act). In the event Seller shall not provide a non-foreign status affidavit, Seller acknowledges that there maybe withholding as provided by the Internal Revenue Code.

(b) **Authorization to Disclose Information:** Seller authorizes: (1) any attorney presently or previously representing Seller to release and disclose any title insurance policy in such attorney's file to Buyer and both Buyer's and Seller's agents and attorneys; (2) the Property's title insurer or its agent to release and disclose all materials in the Property's title insurer's (or title insurer's agent's) file to Buyer and both Buyer's and Seller's agents and attorneys, and (3) the closing attorney to release and disclose any seller's closing disclosure, settlement statement and/or disbursement summary, or any information therein, to the parties to this transaction, their real estate agent(s) and Buyer's lender(s).

(c) **Access to Property:** Seller shall provide reasonable access to the Property through the earlier of Closing or possession by Buyer, including, but not limited to, allowing the Buyer and/or Buyer's agents or representatives an opportunity to (i) conduct Due Diligence, (ii) verify the satisfactory completion of negotiated repairs/improvements, and (iii) conduct a final walk-through inspection of the Property. Seller's obligation includes providing existing utilities operating at Seller's cost including any connections and dewatering. To the extent applicable, Seller shall also be responsible for timely clearing that portion of the Property required by the County to perform tests, inspections and/or evaluations to determine the suitability of the Property for a sewage system and/or private drinking water well.

**NOTE:** See WARNING in paragraph 2 above for limitation on Buyer's right to terminate this Contract as a result of Buyer's continued investigation of the Property following the expiration of the Due Diligence Period.

d) **Removal of Seller's Property:** Seller shall remove from the Property, by the date possession is delivered, (i) all personal property which is not a part of the purchase and (ii) unless otherwise agreed, all garbage and debris.

(e) **Affidavit and Indemnification Agreement:** Seller shall furnish at Settlement an affidavit(s) and indemnification agreement(s) in form satisfactory to Buyer and Buyer's title insurer, if any, executed by Seller and any person or entity who has performed or furnished labor, services, materials or rental equipment to the Property within 120 days prior to the date of Settlement and who may be entitled to claim a lien against the Property as described in N.C.G.S. §44A-8 verifying that each such person or entity has been paid in full and agreeing to indemnify Buyer, Buyer's lender(s) and Buyer's title insurer against all loss from any cause or claim arising there from.

(f) **Designation of Lien Agent, Payment and Satisfaction of Liens:** If required by N.C.G.S. §44A-11.1, Seller shall have designated a Lien Agent, and Seller shall deliver to Buyer as soon as reasonably possible a copy of the appointment of Lien Agent. All deeds of trust, deferred ad valorem taxes, liens and other charges against the Property, not assumed by Buyer, must be paid and satisfied by Seller prior to or at Settlement such that cancellation may be promptly obtained following Closing. Seller shall remain obligated to obtain any such cancellations following Closing.

(g) **Good Title, Legal Access:** Seller shall execute and deliver a GENERAL WARRANTY DEED for the Property in recordable form no later than Settlement, which shall convey fee simple marketable and insurable title, without exception for mechanics' liens, and free of any other liens, encumbrances or defects, including those which would be revealed by a current and accurate survey of the Property, except: ad valorem taxes for the current year (prorated through the date of Settlement); utility easements and unviolated covenants, conditions or restrictions that do not materially affect the value of the Property; and such other liens, encumbrances or defects as may be assumed or specifically approved by Buyer in writing. The Property must have legal access to a public right of way.

**NOTE:** Buyer's failure to conduct a survey or examine title of the Property prior to the expiration of the Due Diligence Period does not relieve the Seller of their obligation to deliver good title under this paragraph.

**NOTE:** If any sale of the Property may be a "short sale," consideration should be given to attaching a Short Sale Addendum (Standard Form 2A14-T) as an addendum to this Contract.

(h) **Deed, Taxes, and Fees:** Seller shall pay for preparation of a deed and all other documents necessary to perform Seller's obligations under this Contract, and for state and county excise taxes, and any deferred, discounted or rollback taxes, and local conveyance fees required by law. The deed is to be made to: Cabarrus County

(i) **Agreement to Pay Buyer Expenses:** Seller shall pay at Settlement \$ \_\_\_\_\_ toward any of Buyer's expenses associated with the purchase of the Property, at the discretion of Buyer and/or lender, if any, including any FHA/VA lender and inspection costs that Buyer is not permitted to pay.

(j) **Owners' Association Fees/Charges: Seller shall pay:** (i) any fees required for confirming Seller's account payment information on owners' association dues or assessments for payment or proration; (ii) any fees imposed by an owners' association and/or a management company as agent of the owners' association in connection with the transaction contemplated by this Contract other than those fees required to be paid by Buyer under paragraph 4(b) above; and (iii) fees incurred by Seller in completing the Residential Property and Owners' Association Disclosure Statement, and resale or other certificates related to a proposed sale of the Property.

(k) **Payment of Confirmed Special Assessments:** Seller shall pay, in full at Settlement, all Confirmed Special Assessments, whether payable in a lump sum or future installments, provided that the amount thereof can be reasonably determined or estimated. The payment of such estimated amount shall be the final payment between the Parties.

(l) **Late Listing Penalties:** All property tax late listing penalties, if any, shall be paid by Seller.

(m) **Owners' Association Disclosure and Condominium Resale Statement Addendum** (Standard Form 2A12-T): If applicable, Seller shall provide the completed Owners' Association Disclosure and Condominium Resale Statement Addendum to Buyer on or before the Effective Date.

(n) **Seller's Failure to Comply or Breach:** If Seller fails to materially comply with any of Seller's obligations under this Paragraph 6 or Seller materially breaches this Contract, and Buyer elects to terminate this Contract as a result of such failure or breach, then the Earnest Money Deposit and the Due Diligence Fee shall be refunded to Buyer and Seller shall reimburse to Buyer the reasonable costs actually incurred by Buyer in connection with Buyer's Due Diligence without affecting any other remedies. If

legal proceedings are brought by Buyer against the Seller to recover the Earnest Money Deposit, the Due Diligence Fee and/or the reasonable costs actually incurred by Buyer in connection with Buyer's Due Diligence, the prevailing party in the proceeding shall be entitled to recover from the non-prevailing party reasonable attorney fees and court costs incurred in connection with the proceeding.

7. **PRORATIONS AND ADJUSTMENTS:** Unless otherwise agreed, the following items shall be prorated, with Seller responsible for the prorated amounts through the date of Settlement, and either adjusted between the parties or paid at Settlement:

- (a) **Taxes on Real Property:** Ad valorem taxes and recurring governmental service fees levied with such taxes on real property shall be prorated on a calendar year basis;
- (b) **Rents:** Rents, if any, for the Property;
- (c) **Dues:** Owners' association regular assessments (dues) and other like charges.

8. **RISK OF LOSS/CONDITION OF PROPERTY AT CLOSING:** The risk of loss or damage by fire or other casualty prior to Closing shall be upon Seller. Seller is advised not to cancel existing insurance on the Property until after confirming recordation of the deed.

Buyer's obligation to complete the transaction contemplated by this Contract shall be contingent upon the Property being in substantially the same or better condition at Closing as on the date of this offer, reasonable wear and tear excepted. If the Property is not in substantially the same or better condition at Closing as on the date of this offer, reasonable wear and tear excepted, Buyer may terminate this Contract by written notice delivered to Seller and the Earnest Money Deposit shall be refunded to Buyer. If the Property is not in such condition and Buyer does NOT elect to terminate this Contract, Buyer shall be entitled to receive, in addition to the Property, the proceeds of any insurance claim filed by Seller on account of any damage or destruction to the Property.

9. **DELAY IN SETTLEMENT/CLOSING:** Absent agreement to the contrary in this Contract or any subsequent modification thereto, if a party is unable to complete Settlement by the Settlement Date but intends to complete the transaction and is acting in good faith and with reasonable diligence to proceed to Settlement ("Delaying Party"), and if the other party is ready, willing and able to complete Settlement on the Settlement Date ("Non-Delaying Party") then the Delaying Party shall give as much notice as possible to the Non-Delaying Party and closing attorney and shall be entitled to a delay in Settlement. If the parties fail to complete Settlement and Closing within fourteen (14) days of the Settlement Date (including any amended Settlement Date agreed to in writing by the parties) or to otherwise extend the Settlement Date by written agreement, then the Delaying Party shall be in breach and the Non-Delaying Party may terminate this Contract and shall be entitled to enforce any remedies available to such party under this Contract for the breach.

10. **POSSESSION:** Unless otherwise provided herein, possession, including all means of access to the Property (keys, codes, including security codes, gate openers, electronic devices, etc.) shall be delivered at Closing as defined in Paragraph 1(m). No alterations, excavations, tree or vegetation removal or other such activities may be done before possession is delivered.

11. **ADDENDA:** CHECK ALL STANDARD ADDENDA THAT MAY BE A PART OF THIS CONTRACT, IF ANY, AND ATTACH HERETO. ITEMIZE ALL OTHER ADDENDA TO THIS CONTRACT, IF ANY, AND ATTACH HERETO.

- |  |   |
|--|---|
| <input type="checkbox"/> Additional Provisions Addendum (Form 2A11-T)            | <input type="checkbox"/> Owners' Association Disclosure And Addendum For Properties Exempt from Residential Property Disclosure Statement (Form 2A12-T) |
| <input type="checkbox"/> Additional Signatures Addendum (Form 3-T)               | <input type="checkbox"/> Seller Financing Addendum (Form 2A5-T)   |
| <input type="checkbox"/> Back-Up Contract Addendum (Form 2A1-T)                  | <input type="checkbox"/> Short Sale Addendum (Form 2A14-T)  |
| <input type="checkbox"/> Loan Assumption Addendum (Form 2A6-T)                   |   |
| <input type="checkbox"/> Identify other attorney or party drafted addenda: _____ |   |

**NOTE: UNDER NORTH CAROLINA LAW, REAL ESTATE BROKERS ARE NOT PERMITTED TO DRAFT ADDENDA TO THIS CONTRACT.**

12. **ASSIGNMENTS:** This Contract may not be assigned without the written consent of all parties except in connection with a tax-deferred exchange, but if assigned by agreement, then this Contract shall be binding on the assignee and assignee's heirs and successors.

13. **TAX-DEFERRED EXCHANGE:** In the event Buyer or Seller desires to effect a tax-deferred exchange in connection with the conveyance of the Property, Buyer and Seller agree to cooperate in effecting such exchange; provided, however, that the exchanging party shall be responsible for all additional costs associated with such exchange, and provided further, that a non-exchanging party shall not assume any additional liability with respect to such tax-deferred exchange. Buyer and Seller shall execute such additional

documents, including assignment of this Contract in connection therewith, at no cost to the non-exchanging party, as shall be required to give effect to this provision.

14. **PARTIES:** This Contract shall be binding upon and shall inure to the benefit of Buyer and Seller and their respective heirs, successors and assigns. As used herein, words in the singular include the plural and the masculine includes the feminine and neuter genders, as appropriate.

15. **SURVIVAL:** If any provision herein contained which by its nature and effect is required to be observed, kept or performed after the Closing, it shall survive the Closing and remain binding upon and for the benefit of the parties hereto until fully observed, kept or performed.

16. **ENTIRE AGREEMENT:** This Contract contains the entire agreement of the parties and there are no representations, inducements or other provisions other than those expressed herein. All changes, additions or deletions hereto must be in writing and signed by all parties. Nothing contained herein shall alter any agreement between a REALTOR® or broker and Seller or Buyer as contained in any listing agreement, buyer agency agreement, or any other agency agreement between them.

17. **CONDUCT OF TRANSACTION:** The parties agree that any action between them relating to the transaction contemplated by this Contract may be conducted by electronic means, including the signing of this Contract by one or more of them and any notice or communication given in connection with this Contract. Any written notice or communication may be transmitted to any mailing address, e-mail address or fax number set forth in the "Notice Information" section below. Any notice or communication to be given to a party herein, any fee, deposit or other payment to be delivered to a party herein, may be given to the party or to such party's agent. Delivery of any notice to a party via means of electronic transmission shall be deemed complete at such time as the sender performs the final act to send such transmission, in a form capable of being processed by the receiving party's system, to any electronic address provided for such party in the "Notice Information" section below. Seller and Buyer agree that the "Notice Information" and "Acknowledgment of Receipt of Monies" sections below shall not constitute a material part of this Contract, and that the addition or modification of any information therein shall not constitute a rejection of an offer or the creation of a counteroffer.

18. **EXECUTION:** This Contract may be signed in multiple originals or counterparts, all of which together constitute one and the same instrument.

19. **COMPUTATION OF DAYS/TIME OF DAY:** Unless otherwise provided, for purposes of this Contract, the term "days" shall mean consecutive calendar days, including Saturdays, Sundays, and holidays, whether federal, state, local or religious. For the purposes of calculating days, the count of "days" shall begin on the day following the day upon which any act or notice as provided in this Contract was required to be performed or made. Any reference to a date or time of day shall refer to the date and/or time of day in the State of North Carolina.

[THIS SPACE INTENTIONALLY LEFT BLANK]

Buyer initials \_\_\_\_\_ Seller initials \_\_\_\_\_

THE NORTH CAROLINA ASSOCIATION OF REALTORS®, INC. AND THE NORTH CAROLINA BAR ASSOCIATION MAKE NO REPRESENTATION AS TO THE LEGAL VALIDITY OR ADEQUACY OF ANY PROVISION OF THIS FORM IN ANY SPECIFIC TRANSACTION. IF YOU DO NOT UNDERSTAND THIS FORM OR FEEL THAT IT DOES NOT PROVIDE FOR YOUR LEGAL NEEDS, YOU SHOULD CONSULT A NORTH CAROLINA REAL ESTATE ATTORNEY BEFORE YOU SIGN IT.

This offer shall become a binding contract on the Effective Date. Unless specifically provided otherwise, Buyer's failure to timely deliver any fee, deposit or other payment provided for herein shall not prevent this offer from becoming a binding contract, provided that any such failure shall give Seller certain rights to terminate the contract as described herein or as otherwise permitted by law.

Date: \_\_\_\_\_  
 Buyer \_\_\_\_\_  
           **Cabarrus County**  
 Date: \_\_\_\_\_  
 Buyer \_\_\_\_\_  
 Entity Buyer: \_\_\_\_\_  
                   **Cabarrus County**  
           (Name of LLC/Corporation/Partnership/Trust/etc.)  
 By: \_\_\_\_\_  
 Name: **Kyle Bilafer** \_\_\_\_\_  
   Print Name  
 Title: \_\_\_\_\_  
 Date: \_\_\_\_\_

Date: \_\_\_\_\_  
 Seller \_\_\_\_\_  
           **Tracy W Talley**  
 Date: \_\_\_\_\_  
 Seller \_\_\_\_\_  
           **Carol A Talley**  
 Entity Seller: \_\_\_\_\_  
   (Name of LLC/Corporation/Partnership/Trust/etc.)  
 By: \_\_\_\_\_  
 Name: \_\_\_\_\_  
   Print Name  
 Title: \_\_\_\_\_  
 Date: \_\_\_\_\_

**WIRE FRAUD WARNING**

TO BUYERS: BEFORE SENDING ANY WIRE, YOU SHOULD CALL THE CLOSING ATTORNEY'S OFFICE TO VERIFY THE INSTRUCTIONS. IF YOU RECEIVE WIRING INSTRUCTIONS FOR A DIFFERENT BANK, BRANCH LOCATION, ACCOUNT NAME OR ACCOUNT NUMBER, THEY SHOULD BE PRESUMED FRAUDULENT. DO NOT SEND ANY FUNDS AND CONTACT THE CLOSING ATTORNEY'S OFFICE IMMEDIATELY.

TO SELLERS: IF YOUR PROCEEDS WILL BE WIRED, IT IS RECOMMENDED THAT YOU PROVIDE WIRING INSTRUCTIONS AT CLOSING IN WRITING IN THE PRESENCE OF THE ATTORNEY. IF YOU ARE UNABLE TO ATTEND CLOSING, YOU MAY BE REQUIRED TO SEND AN ORIGINAL NOTARIZED DIRECTIVE TO THE CLOSING ATTORNEY'S OFFICE CONTAINING THE WIRING INSTRUCTIONS. THIS MAY BE SENT WITH THE DEED, LIEN WAIVER AND TAX FORMS IF THOSE DOCUMENTS ARE BEING PREPARED FOR YOU BY THE CLOSING ATTORNEY. AT A MINIMUM, YOU SHOULD CALL THE CLOSING ATTORNEY'S OFFICE TO PROVIDE THE WIRE INSTRUCTIONS. THE WIRE INSTRUCTIONS SHOULD BE VERIFIED OVER THE TELEPHONE VIA A CALL TO YOU INITIATED BY THE CLOSING ATTORNEY'S OFFICE TO ENSURE THAT THEY ARE NOT FROM A FRAUDULENT SOURCE.

WHETHER YOU ARE A BUYER OR A SELLER, YOU SHOULD CALL THE CLOSING ATTORNEY'S OFFICE AT A NUMBER THAT IS INDEPENDENTLY OBTAINED. TO ENSURE THAT YOUR CONTACT IS LEGITIMATE, YOU SHOULD NOT RELY ON A PHONE NUMBER IN AN EMAIL FROM THE CLOSING ATTORNEY'S OFFICE, YOUR REAL ESTATE AGENT OR ANYONE ELSE.

NOTICE INFORMATION

NOTE: INSERT AT LEAST ONE ADDRESS AND/OR ELECTRONIC DELIVERY ADDRESS EACH PARTY AND AGENT APPROVES FOR THE RECEIPT OF ANY NOTICE CONTEMPLATED BY THIS CONTRACT. INSERT "N/A" FOR ANY WHICH ARE NOT APPROVED.

BUYER NOTICE ADDRESS:

Mailing Address: 65 Church St S
Concord, NC 28025

Buyer Fax#:

Buyer E-mail:

SELLER NOTICE ADDRESS:

Mailing Address: 903 Cold Springs Road, Concord, NC
28025

Seller Fax#:

Seller E-mail:

CONFIRMATION OF AGENCY/NOTICE ADDRESSES

Selling Firm Name: New Branch Real Estate Advisors, LLC
Acting as [X] Buyer's Agent [ ] Seller's(sub)Agent [ ] Dual Agent
Firm License#: NC 28262
Mailing Address: 805 Trade St NW, Suite 102, Concord,
NC 28027

Listing Firm Name:
Acting as [ ] Seller's Agent [ ] Dual Agent
Firm License#:
Mailing Address:

Individual Selling Agent: Harris Morrison
[ ] Acting as a Designated Dual Agent (check only if applicable)

Individual Listing Agent:
[ ] Acting as a Designated Dual Agent (check only if applicable)

Selling Agent License#: 176451

Listing Agent License#:

Selling Agent Phone#: (704)786-8888

Listing Agent Phone#:

Selling Agent Fax#: (704)786-8889

Listing Agent Fax#:

Selling Agent E-mail: harris@harrismorrison.com

Listing Agent E-mail:

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ACKNOWLEDGMENT OF RECEIPT OF MONIES

Seller: Tracy W Talley, Carol A Talley ("Seller")

Buyer: Cabarrus County ("Buyer")

Property Address: 4300-4400 Gold Hill Rd E, Gold Hill, 28071 ("Property")

LISTING AGENT ACKNOWLEDGMENT OF RECEIPT OF DUE DILIGENCE FEE

Paragraph 1(d) of the Offer to Purchase and Contract between Buyer and Seller for the sale of the Property provides for the payment to Seller of a Due Diligence Fee in the amount of \$ \_\_\_\_\_, receipt of which Listing Agent hereby acknowledges.

Date: \_\_\_\_\_ Firm: \_\_\_\_\_

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print name)

SELLER ACKNOWLEDGMENT OF RECEIPT OF DUE DILIGENCE FEE

Paragraph 1(d) of the Offer to Purchase and Contract between Buyer and Seller for the sale of the Property provides for the payment to Seller of a Due Diligence Fee in the amount of \$ 2,000.00, receipt of which Seller hereby acknowledges.

Date: \_\_\_\_\_ Seller: \_\_\_\_\_

(Signature)  
**Tracy W Talley**

Date: \_\_\_\_\_ Seller: \_\_\_\_\_

(Signature)  
**Carol A Talley**

ESCROW AGENT ACKNOWLEDGMENT OF RECEIPT OF INITIAL EARNEST MONEY DEPOSIT

Paragraph 1(d) of the Offer to Purchase and Contract between Buyer and Seller for the sale of the Property provides for the payment to Escrow Agent of an Initial Earnest Money Deposit in the amount of \$ 8,000.00. Escrow Agent as identified in Paragraph 1(f) of the Offer to Purchase and Contract hereby acknowledges receipt of the Initial Earnest Money Deposit and agrees to hold and disburse the same in accordance with the terms of the Offer to Purchase and Contract.

Date: \_\_\_\_\_ Firm: Law offices of Richard Koch

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print name)

ESCROW AGENT ACKNOWLEDGMENT OF RECEIPT OF (ADDITIONAL) EARNEST MONEY DEPOSIT

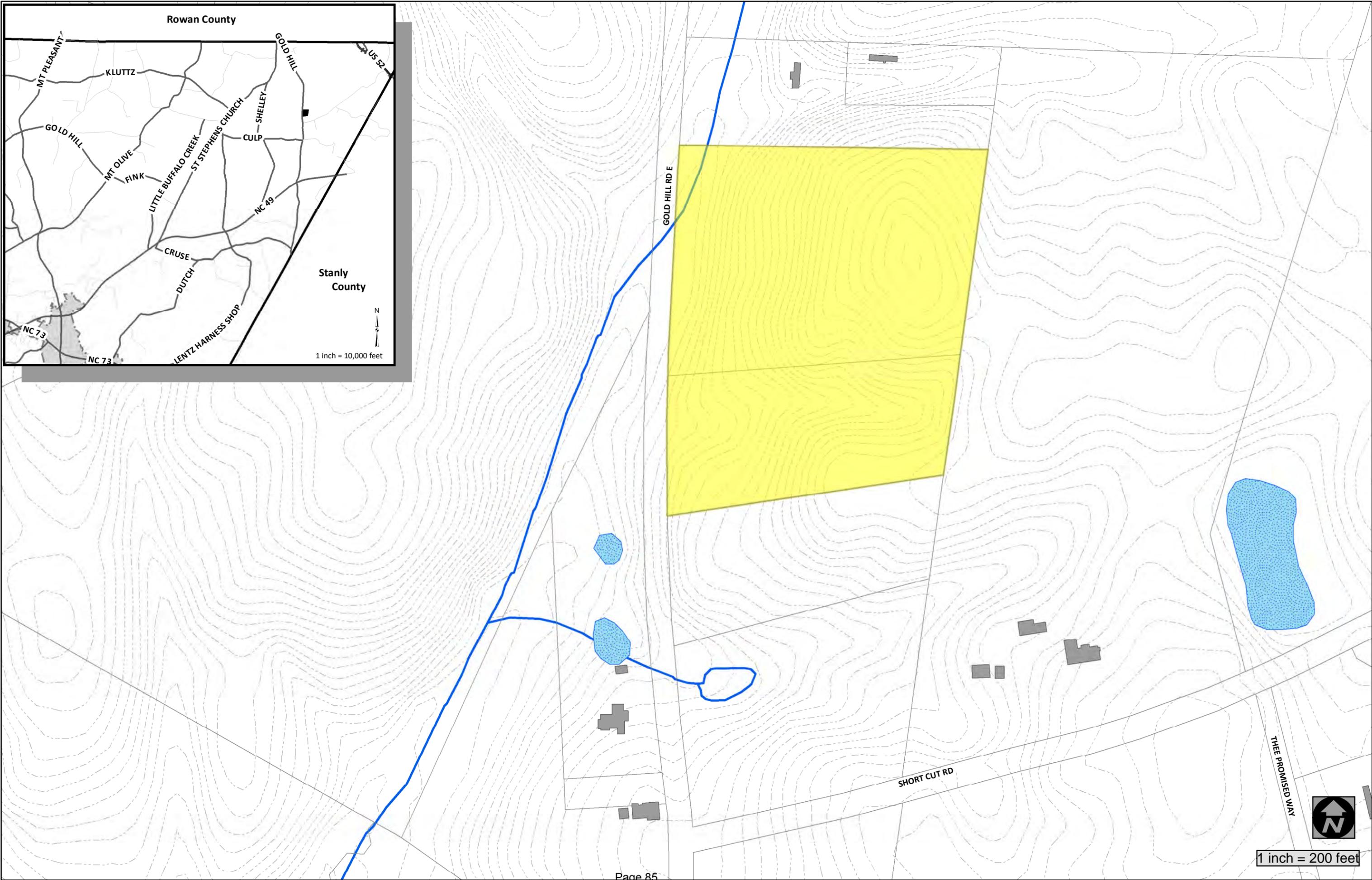
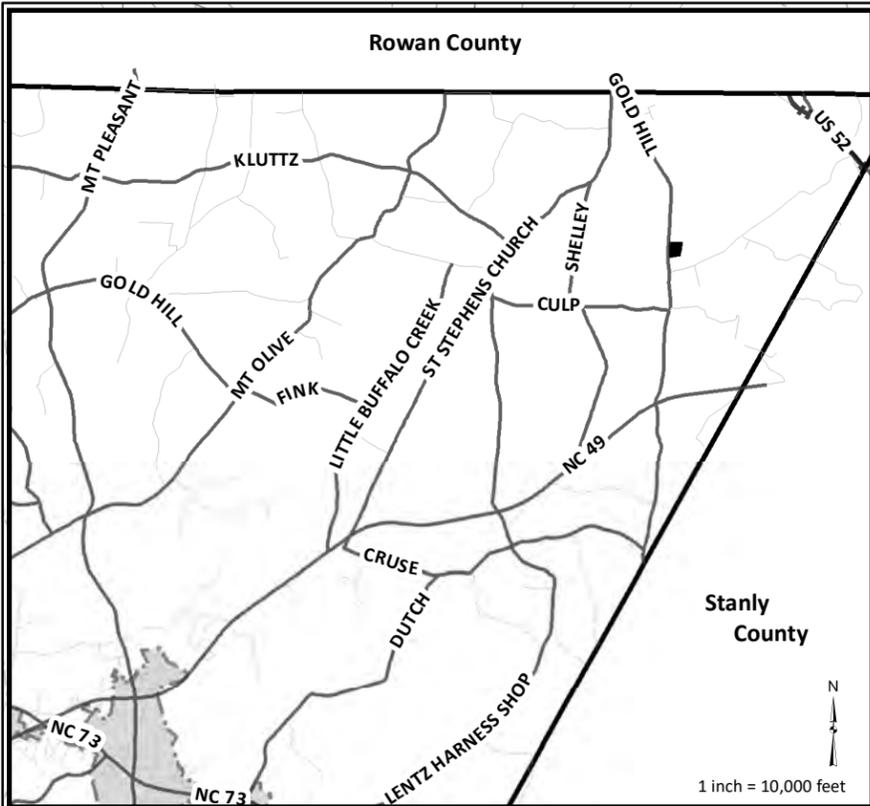
Paragraph 1(d) of the Offer to Purchase and Contract between Buyer and Seller for the sale of the Property provides for the payment to Escrow Agent of an (Additional) Earnest Money Deposit in the amount of \$ \_\_\_\_\_. Escrow Agent as identified in Paragraph 1(f) of the Offer to Purchase and Contract hereby acknowledges receipt of the (Additional) Earnest Money Deposit and agrees to hold and disburse the same in accordance with the terms of the Offer to Purchase and Contract.

Date: \_\_\_\_\_ Firm: Law offices of Richard Koch

Time: \_\_\_\_\_  AM,  PM

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Print name)



1 inch = 200 feet

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

County Manager - Utility Easements at Roberta Road Middle School

### **BRIEF SUMMARY:**

The new Roberta Road Middle School is currently under construction. Duke Energy is requesting an easement for the power lines serving the school. This is one of many utility easements that will be requested during and after construction. Cabarrus County Schools and County staff have discussed a more streamlined process and are requesting that the Board of Commissioners approve this easement request and in doing so also pre-approve all standard utility easements requests for this middle school. Any request that is not part of the standard utilities or otherwise is unique to this school, will be brought back to the Board of Commissioners for approval.

### **REQUESTED ACTION:**

Motion to approve all standard utility easements associated with the construction of the Roberta Road Middle School subject to review and revision by the County Attorney and including authorization for the County Manager to sign all necessary documents.

### **EXPECTED LENGTH OF PRESENTATION:**

### **SUBMITTED BY:**

Jonathan B. Marshall, Deputy County Manager

### **BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Duke Energy Easement
- ▣ Easement Sketch Roberta Road MS

Prepared by: Duke Energy Carolinas, LLC  
Return to: Duke Energy Carolinas, LLC  
Attn: Chris Branch  
2818 S. Main Street  
Concord, NC 28027

Parcel # 5518 16 4257 0000

EASEMENT

State of North Carolina

County of Cabarrus

THIS EASEMENT (“**Easement**”) is made this \_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_, from **CABARRUS COUNTY**, a body politic and political subdivision of the State of North Carolina (“**Grantor**”, whether one or more), to **DUKE ENERGY CAROLINAS, LLC**, a North Carolina limited liability company (“**Grantee**”).

Grantor, for and in consideration of the sum of One and 00/100 Dollar (\$1.00) and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, does hereby grant unto Grantee a perpetual and non-exclusive easement, to construct, reconstruct, operate, patrol, maintain, repair, replace, relocate, add to, modify, and remove electric and communication lines including, but not limited to, all necessary supporting structures, and all other appurtenant apparatus and equipment for the transmission and distribution of electrical energy, and for technological purposes related to the operation of the electric facilities and for the communication purposes of Incumbent Local Exchange Carriers (collectively, “**Facilities**”). Grantor is the owner of that certain property described in that instrument recorded in Deed Book 13824, Page 187, Cabarrus County Register of Deeds (“**Property**”). The Facilities may be both overhead and underground and located in, upon, over, along, under, through, and across a portion of the Property within an easement area described as follows: A strip of land thirty feet (30’) in uniform width for the overhead portion of said Facilities and a strip of land twenty feet (20’) in uniform width for the underground portion of said Facilities, lying equidistant on both sides of a centerline, which centerline shall be established by the center of the Facilities as installed, along with an area ten feet (10’) wide on all sides of the foundation of any Grantee enclosure/transformer, vault and/or manhole, (hereinafter referred to as the “**Easement Area**”).

The rights granted herein include, but are not limited to, the following:

*For Grantee’s Internal Use:*  
Work Order #: 37088327

1. Grantee shall have the right of ingress and egress over the Easement Area, Property, and any adjoining lands now owned or hereinafter acquired by Grantor (using lanes, driveways, and adjoining public roads where practical as determined by Grantee).
2. Grantee shall have the right to trim, cut down, and remove from the Easement Area, at any time or times and using safe and generally accepted arboricultural practices, trees, limbs, undergrowth, other vegetation, and obstructions.
3. Grantee shall have the right to trim, cut down, and remove from the Property, at any time or times and using safe and generally accepted arboricultural practices, dead, diseased, weak, dying, or leaning trees or limbs, which, in the opinion of Grantee, might fall upon the Easement Area or interfere with the safe and reliable operation of the Facilities.
4. Grantee shall have the right to install necessary guy wires and anchors extending beyond the boundaries of the Easement Area.
5. Grantee shall have the right to relocate the Facilities and Easement Area on the Property to conform to any future highway or street relocation, widening, or alterations.
6. Grantor shall not place, or permit the placement of, any structures, improvements, facilities, or obstructions, within or adjacent to the Easement Area, which may interfere with the exercise of the rights granted herein to Grantee. Grantee shall have the right to remove any such structure, improvement, facility, or obstruction at the expense of Grantor.
7. Excluding the removal of vegetation, structures, improvements, facilities, and obstructions as provided herein, Grantee shall promptly repair or cause to be repaired any physical damage to the surface area of the Easement Area and Property resulting from the exercise of the rights granted herein to Grantee. Such repair shall be to a condition which is reasonably close to the condition prior to the damage, and shall only be to the extent such damage was caused by Grantee or its contractors or employees.
8. The rights granted in this Easement include the right to install Facilities wherever needed on the Property to serve future development on the Property and adjoining lands. Portions of the Facilities may be installed immediately and other portions may be installed in the future as the need develops. Facilities installed in the future shall be installed at locations mutually agreeable to the parties hereto if they are to be located outside of the Easement Area. Upon any future installations of Facilities at mutually agreed locations, the Easement Area shall be deemed to include such future locations.
9. All other rights and privileges reasonably necessary, in Grantee's sole discretion, for the safe, reliable, and efficient installation, operation, and maintenance of the Facilities.

The terms Grantor and Grantee shall include the respective heirs, successors, and assigns of Grantor and Grantee. The failure of Grantee to exercise or continue to exercise or enforce any of the rights herein granted shall not be construed as a waiver or abandonment of the right thereafter at any time, or from time to time, to exercise any and all such rights.

TO HAVE AND TO HOLD said rights, privilege, and easement unto Grantee, its successors, licensees, and assigns, forever. Grantor warrants and covenants that Grantor has the full right and authority to convey to Grantee this perpetual Easement, and that Grantee shall have quiet and peaceful possession, use and enjoyment of the same.

**IN WITNESS WHEREOF**, Grantor has signed this Easement under seal effective this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

**CABARRUS COUNTY**

a body politic and political subdivision of the State of North Carolina

(SEAL)

\_\_\_\_\_  
Michael K. Downs, County Manager

Attest:

\_\_\_\_\_

Print Name

Title

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

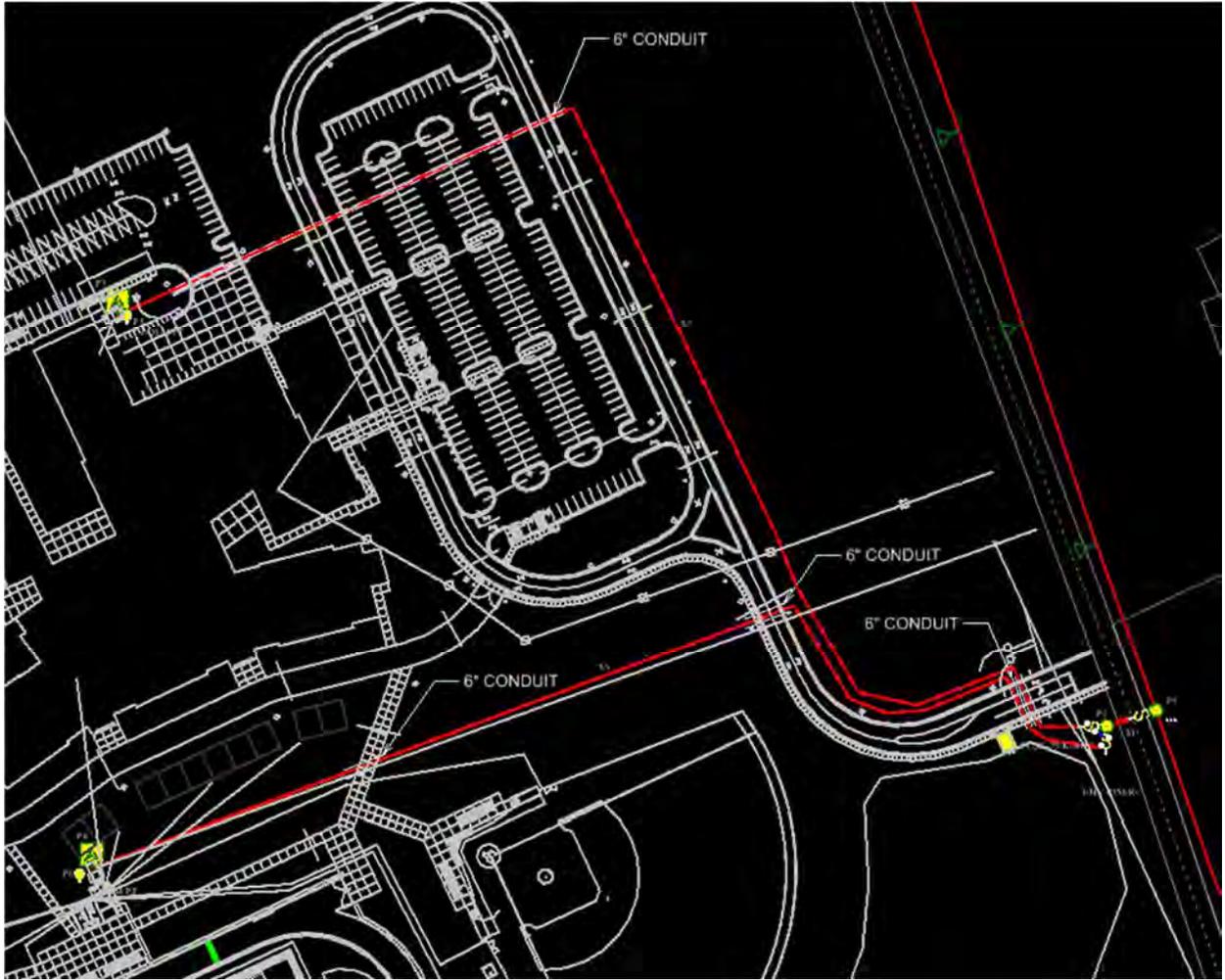
I, \_\_\_\_\_, a Notary Public of \_\_\_\_\_ County, State of \_\_\_\_\_, certify that \_\_\_\_\_ personally appeared before me this day and acknowledged that he/she is \_\_\_\_\_ of CABARRUS COUNTY, a body politic and political subdivision of the State of North Carolina, and that by authority duly given and as the act of said corporation, the foregoing EASEMENT was signed in its name by its County Manager, sealed with its official seal, and attested by herself/himself as its \_\_\_\_\_.

Witness my hand and notarial seal, this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.



Notary Public: \_\_\_\_\_

Commission expires: \_\_\_\_\_



# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Planning and Development - 2020-2021 HOME Program Budget Amendment and Project Ordinance

### **BRIEF SUMMARY:**

The Board of Commissioners agreed in early 2020 to participate in the HOME program for FY 21. Two public hearings were held on proposed projects. Staff recently received the HOME contract from Concord which requires a budget amendment and project ordinance update in order to expend the funds. Staff also received funds from the payoff of a property that was rehabilitated several years ago. Those funds are required to be reinvested in the program and are shown on a second budget amendment. The required documents are attached.

### **REQUESTED ACTION:**

Motion to adopt the budget amendments and associated project ordinance update.

### **EXPECTED LENGTH OF PRESENTATION:**

### **SUBMITTED BY:**

Kelly Sifford, AICP  
Planning and Development Director

### **BUDGET AMENDMENT REQUIRED:**

Yes

### **COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Budget Amendment
- ▣ Budget Amendment to add program income
- ▣ Project Ordinance

Date: **February 15 2021**

Amount: **182,652.00**

Dept. Head: **Suzanne Burgess for Kelly Sifford**

Department: **HOME GRANTS - COMMUNITY DEVELOPMENT**

Internal Transfer Within Department

Transfer Between Departments/Funds

Supplemental Request

This budget amendment is to budget revenues and expenditures for the HOME INVESTMENT PARTNERSHIPS PROGRAM - HOME GRANT 2020 - in the Community Development Special Revenue Fund. The program is between the City of Concord, serving as the lead entity of the Cabarrus/Iredell/Rowan HOME Consortium and Cabarrus County. The services to be performed are Single Family New Construction. The County is required to have fifty percent (50%) of its funds obligated by March 1, 2022 and one hundred percent (100%) by October 1, 2022. Funds must be 100% drawn down by July 1, 2024. The County as been designated to receive \$139,429 in project funds and \$8,366 for administrative costs. The County's match is \$34,857 and will be a contribution from the General Fund.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
410	6	3674-6432	HOME 20 - Consortium Revenues	-	147,795.00	-	147,795.00
410	6	3674-6902	Contribution from General Fund	-	34,857.00	-	34,857.00
410	9	3674-9383	HOME 20 - Subcontractor Construction	-	174,286.00	-	174,286.00
410	9	3674-9605	HOME 20 - Consultant	-	8,366.00	-	8,366.00

**Total** 0.00

**Budget Officer**

**County Manager**

**Board of Commissioners**

Approved

Approved

Approved

Denied

Denied

Denied

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

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

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

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

Date: February 15 2021

Amount: 10,400.00

Dept. Head: Suzanne Burgess for Kelly Sifford

Department: HOME GRANTS - COMMUNITY DEVELOPMENT SRF

Internal Transfer Within Department

Transfer Between Departments/Funds

X Supplemental Request

This budget amendment is to budget additional revenues and expenditures for HOME GRANT 2020 - in the Community Development Special Revenue Fund. The additional revenue received for a payback from previous HOME loan programs. Per the Home agreement, the County shall retain as program income all repayments to fund additional eligible HOME activities of the County's choosing. Ths County is using the additional funds to fund HOME 20 activities.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
410	6	3674-6606	HOME 20 - Program Fees	-	10,400.00	-	10,400.00
410	9	3674-9383	HOME 20 - Subcontractor Construction	174,286.00	10,400.00	-	184,686.00

Total 0.00

Budget Officer

County Manager

Board of Commissioners

Approved

Approved

Approved

Denied

Denied

Denied

Signature

Signature

Signature

Date

Date

Date

## CABARRUS COUNTY COMMUNITY DEVELOPMENT SPECIAL REVENUE PROJECT ORDINANCE

**BE IT ORDAINED** by the Board of Commissioners of the County of Cabarrus, North Carolina that, pursuant to Section 13.2 of Chapter 159 of the General Statutes of North Carolina, the following grant project ordinance is hereby adopted:

Section 1. The projects authorized is for the Grant Projects for the purpose of receiving and disbursing funds as directed by Home Program Grant and the Department of Commerce. The projects are referenced in Section 3.

Section 2. The officers of this unit are hereby directed to proceed within the terms of the Generally Accepted Accounting Principles (GAAP), the grant terms, the rules and regulations of the Department of Commerce and the budget contained herein.

Section 3. The following budgeted amounts are appropriated for the projects:

CDBG:	
Sub-Contractor	\$ 42,352
Home 2015	
Sub-Contractor	159,887
Consultants	4,292
Home 2016:	
Sub-Contractor	119,392
Consultants	3,271
Home 2020:	
Sub-Contractor	184,686
Consultants	<u>8,299</u>
Total	\$ <u>522,179</u>

Section 4. The following budgeted revenues are anticipated to be available to complete these projects.

CDBG:	
Program Fees	\$ 42,352
Home 2015:	
Home Consortium Revenues	94,684
Program Fees	44,495
Contribution from General Fund	25,000
Home 2016:	
Home Consortium Revenues	97,663
Contribution from General Fund	25,000
Home 2020	
Home Consortium Revenues	147,728
Program Fees	10,400
Contribution from General Fund	<u>34,857</u>
Total	\$ <u>522,179</u>

Section 5. The Finance Officer is hereby directed to maintain within the Grant Project sufficient detailed accounting records to satisfy the terms of any debt financing resolutions and any grant agreements or federal and State regulations.

Section 6. Funds may be advanced from the General Fund for the purpose or making payments as due. Reimbursement requests should be made to the granter agencies in an orderly and timely manner.

Section 7. The Finance Officer is directed to report, at the request of the Board, on the financial status of each project element in Section 3 and on the total revenues received or claimed.

Section 8. Copies of this grant project ordinance shall be furnished to the Clerk to the Governing Board, and to the Budget Officer and the Finance Officer for direction in carrying out the projects.

Section 9. At the completion of each individual project, all unrestricted excess funds are transferred to the General Fund and the Grant Project Ordinance is closed.

Section 10. The County Manager is hereby authorized to transfer revenues and appropriation within an ordinance as contained herein under the following conditions:

- a. The Manager may transfer amounts between objects of expenditures and revenues within a function without limitation.
- b. The Manager may transfer amounts up to \$100,000 between functions of the same ordinance.
- c. The Manager may transfer amounts between contingency funds which are set aside for a specific project for budgetary shortfalls or upon the appropriate approval of a change order.
- d. The Manager may either enter into and execute change orders or amendments to County construction contracts in amounts up to \$90,000 when the project ordinance contains sufficient appropriated but unencumbered funds.

Adopted this 15th day of February, 2021.

CABARRUS COUNTY BOARD OF COMMISSIONERS

BY: \_\_\_\_\_  
Stephen M. Morris, Chairman

ATTEST:

\_\_\_\_\_  
Clerk to the Board

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Property and Liability Internal Service Fund - Move Funds from Property and Liability Insurance Internal Service Fund to the General Fund

### **BRIEF SUMMARY:**

A 2020 Ford Sheriff Interceptor SUV was destroyed in an accident while responding to an emergency traffic call. Funds are available in the Property and Liability Fund to appropriate to replace the vehicle.

### **REQUESTED ACTION:**

Motion to approve the related Budget Amendment to appropriate funds from the Property and Liability Internal Service Fund to the General Fund to replace the Sheriff Vehicle.

### **EXPECTED LENGTH OF PRESENTATION:**

### **SUBMITTED BY:**

Kyle Bilafer, Area Manager of Operations

### **BUDGET AMENDMENT REQUIRED:**

Yes

### **COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

---

### **ATTACHMENTS:**

▣ Budget Amendment

Date: February 15, 2021

Amount: 42,000.00

Dept. Head: Suzanne Burgess for Kyle Bilafer

Department: Finance

Internal Transfer Within Department                      X                      Transfer Between Departments/Funds                      Supplemental Request

This budget amendment is to transfer funds from Property and Liability Internal Service Fund to the Sheriff's Department budget to purchase a new vehicle, including equipment and labor. The vehicle will replace a vehicle totaled in a wreck.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
600	9	1919-9641	Insurance Claims	380,230.00	-	42,000.00	338,230.00
600	9	1919-9704	Contribution to General Fund	-	42,000.00	-	42,000.00
001	6	2110-6931	Contribution from Internal Service Fund	-	42,000.00	-	42,000.00
001	9	2110-9863	Motor Vehicles	1,602,671.56	42,000.00	-	1,644,671.56

**Total**                      0.00

**Budget Officer**

**County Manager**

**Board of Commissioners**

Approved

Approved

Approved

Denied

Denied

Denied

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

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

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

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

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Tax Administration - Advertisement of 2020 Delinquent Taxes

### **BRIEF SUMMARY:**

NC General Statute 105-369 requires the Tax Collector to report the amount of unpaid taxes for the current year, 2020, that are liens on real property, less bankruptcies and Property Tax Commission (PTC) appeals; and to set the advertisement date.

2020 REAL ESTATE \$12,982,823.00

Less: Bankruptcies \$ 85,000.00

PTC Appeals \$ 0.00

Total (January 31, 2020) \$12,897,823.00

Requested Date of Advertisement of Tax Liens: March 28, 2021

### **REQUESTED ACTION:**

Motion to approve the report for the 2020 outstanding tax balances that are a lien on real property and to order the Tax Collector to advertise these liens in the Independent Tribune on Sunday March 28, 2021.

### **EXPECTED LENGTH OF PRESENTATION:**

### **SUBMITTED BY:**

David Thrift, Tax Administrator

### **BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▣ Report
- ▣ Order to Advertise Delinquent Taxes

# PublicDataExtraction\_Totals\_2021012610520853.txt

NUMBEROFRECORDS TOTALDUE

**8174**

**12982823.03**



ORDER OF THE BOARD OF COUNTY COMMISSIONERS  
IN ACCORDANCE WITH N.C.G.S. 105-369

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State of North Carolina  
County of Cabarrus

To: M. David Thrift, Tax Administrator of Cabarrus County

You are hereby authorized, empowered, and commanded to advertise tax liens on real property for failure to pay 2020 property taxes. You shall advertise said liens by posting a notice of liens at the county courthouse and by publishing each lien at least one time in a newspaper having general circulation in the taxing unit. Advertisement of liens shall be made on Sunday March 28, 2021.

This order shall be a full and sufficient authority to direct, require, and enable you to advertise said tax liens in accordance with North Carolina General Statute 105-369.

Witness my hand and official seal, this 15<sup>th</sup> day of February, 2021.

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Stephen M. Morris, Chairman  
Cabarrus County Board of Commissioners

Attest:

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Lauren Linker  
Clerk to the Board of County Commissioners

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

Consent Agenda

### **SUBJECT:**

Tax Administration - Refund and Release Reports - January 2021

### **BRIEF SUMMARY:**

The Release Report contains taxpayers' names, bill numbers, valuations, tax amounts, along with the justifications for releasing the valuation/tax amounts for outstanding levies in accordance with N.C.G.S. 105-381. The Refund Report is a summary sheet which lists data from each refund request form, along with the justification for the refunds to the taxpayers in accordance with N.C.G.S. 105-381.

Note: Due to the transition of motor vehicles onto the new North Carolina Vehicle Tax System (NCVTS), motor vehicle-related refunds and releases will begin to be displayed on the new report generated by NCVTS.

### **REQUESTED ACTION:**

Motion to approve the January 2021 Refund and Release Reports as submitted, including the NCVTS Refund Report, and grant authority to the Tax Collector to process the refunds and releases.

### **EXPECTED LENGTH OF PRESENTATION:**

### **SUBMITTED BY:**

M. David Thrift, Tax Administrator

### **BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

- ▢ Release Refund Summary
- ▢ Release Refund Detail
- ▢ NCVTS Refund Report

Summary of Releases and Refunds for the Month Of January 2021

RELEASES FOR THE MONTH OF: JANUARY 2021

**\$37,624.52**

BREAKDOWN OF RELEASES:

COUNTY	\$28,818.68
CITY OF CONCORD	\$1,029.96
CITY OF KANNAPOLIS	\$5,153.10
CITY OF LOCUST	\$0.00
CITY OF STANFIELD	\$0.00
CITY OF CONCORD DOWNTOWN	\$34.17
TOWN OF HARRISBURG	\$274.50
TOWN OF MIDLAND	\$6.86
TOWN OF MT. PLEASANT	\$0.00
ALLEN F/D	\$28.57
COLD WATER F/D	\$0.00
ENOCHVILLE F/D	\$0.00
FLOWES STORE F/D	\$777.85
GEORGEVILLE F/D	\$1,480.12
GOLD HILL F/D	\$0.00
HARRISBURG F/D	\$0.00
JACKSON PARK F/D	\$0.00
MIDLAND F/D	\$0.00
MT MITCHELL F/D	\$0.00
MT PLEASANT F/D	\$20.71
NORTHEAST F/D	\$0.00
ODELL F/D	\$0.00
POPLAR TENT F/D	\$0.00
RICHFIELD F/D	\$0.00
RIMER F/D	\$0.00
KANNAPOLIS RURAL F/D	\$0.00
CONCORD RURAL F/D	\$0.00

REFUNDS FOR THE MONTH OF: JANUARY 2021

**\$4,055.85**

BREAKDOWN OF REFUNDS:

COUNTY	\$2,750.85
CITY OF CONCORD	\$5.79
CITY OF KANNAPOLIS	\$100.43
CITY OF LOCUST	\$0.00
CITY OF STANFIELD	\$0.00
CITY OF CONCORD DOWNTOWN	\$0.00
TOWN OF HARRISBURG	\$1,174.92
TOWN OF MIDLAND	\$0.00
TOWN OF MT. PLEASANT	\$0.00
ALLEN F/D	\$0.00
COLD WATER F/D	\$0.00
ENOCHVILLE F/D	\$0.00
FLOWES STORE F/D	\$0.00
GEORGEVILLE F/D	\$0.00
GOLD HILL F/D	\$0.00
HARRISBURG F/D	\$0.00
JACKSON PARK F/D	\$13.51
MIDLAND F/D	\$0.00
MT. MITCHELL F/D	\$0.00
MT. PLEASANT F/D	\$2.00
NORTHEAST F/D	\$0.00
ODELL F/D	\$8.35
POPLAR TENT F/D	\$0.00
RICHFIELD F/D	\$0.00
RIMER F/D	\$0.00
KANNAPOLIS RURAL F/D	\$0.00
CONCORD RURAL F/D	\$0.00

JANUARY 2021 RELEASE REPORT

Name	Bill#	Reason	District	Amount
AAMES CAPITAL CORPORATION	2019-10481		C LEGLFEE	6.85
BARBEE RAY H JR	2019-15816		C TITLFEE	1000.00
BARBEE RAY H JR	2019-15816		C LEGLFEE	263.41
BARNHARDT JAMES K III	2020-16419	PROPERTY SOLD 105381	C ADVLTAX	3.70
BARNHARDT JAMES K III	2020-16419	PROPERTY SOLD 105381	CI04ADVLTAX	3.15
BARNHARDT JAMES K III	2020-16419	PROPERTY SOLD 105381	CI04PEN FEE	0.32
BARNHARDT JAMES K III	2020-16419	PROPERTY SOLD 105381	C PEN FEE	0.37
BRIAN KING SERVICES LLC	2020-21557	INFORMAL VALUE APPEAL 105317	CI02ADVLTAX	33.60
BRIAN KING SERVICES LLC	2020-311	INFORMAL VALUE APPEAL 105317	C ADVLTAX	51.80
BRIAN KING SERVICES LLC	2020-311	INFORMAL VALUE APPEAL 105317	C PEN FEE	10.36
BRIAN KING SERVICES LLC	2020-311	INFORMAL VALUE APPEAL 105317	CI02ADVLTAX	33.60
BRIAN KING SERVICES LLC	2020-311	INFORMAL VALUE APPEAL 105317	CI02PEN FEE	6.72
BRIAN KING SERVICES LLC	2020-21557	INFORMAL VALUE APPEAL 105317	CI02PEN FEE	3.36
BRIAN KING SERVICES LLC	2020-21557	INFORMAL VALUE APPEAL 105317	C ADVLTAX	51.80
BRIAN KING SERVICES LLC	2020-21557	INFORMAL VALUE APPEAL 105317	C PEN FEE	5.18
BRIAN KING SERVICES LLC	2020-310	INFORMAL VALUE APPEAL 105317	C ADVLTAX	50.40
BRIAN KING SERVICES LLC	2020-309	INFORMAL VALUE APPEAL 105317	C ADVLTAX	49.00
BRIAN KING SERVICES LLC	2020-309	INFORMAL VALUE APPEAL 105317	C PEN FEE	19.60
BRIAN KING SERVICES LLC	2020-309	INFORMAL VALUE APPEAL 105317	CI02ADVLTAX	33.60
BRIAN KING SERVICES LLC	2020-309	INFORMAL VALUE APPEAL 105317	CI02PEN FEE	13.44
BRIAN KING SERVICES LLC	2020-308	INFORMAL VALUE APPEAL 105317	C ADVLTAX	280.00
BRIAN KING SERVICES LLC	2020-308	INFORMAL VALUE APPEAL 105317	C PEN FEE	140.00
BRIAN KING SERVICES LLC	2020-308	INFORMAL VALUE APPEAL 105317	CI02ADVLTAX	192.00
BRIAN KING SERVICES LLC	2020-308	INFORMAL VALUE APPEAL 105317	CI02PEN FEE	96.00
BRIAN KING SERVICES LLC	2020-307	INFORMAL VALUE APPEAL 105317	C ADVLTAX	280.00
BRIAN KING SERVICES LLC	2020-307	INFORMAL VALUE APPEAL 105317	C PEN FEE	168.00
BRIAN KING SERVICES LLC	2020-307	INFORMAL VALUE APPEAL 105317	CI02ADVLTAX	192.00
BRIAN KING SERVICES LLC	2020-307	INFORMAL VALUE APPEAL 105317	CI02PEN FEE	115.20
BRIAN KING SERVICES LLC	2020-310	INFORMAL VALUE APPEAL 105317	C PEN FEE	15.12
BRIAN KING SERVICES LLC	2020-310	INFORMAL VALUE APPEAL 105317	CI02ADVLTAX	33.60
BRIAN KING SERVICES LLC	2020-310	INFORMAL VALUE APPEAL 105317	CI02PEN FEE	10.08
CHACON ANGEL	2019-26763	PROPERTY REPORTED IN ERROR 105381	C ADVLTAX	35.30
CHACON ANGEL	2019-26763	PROPERTY REPORTED IN ERROR 105381	CI02PEN FEE	2.29
CHACON ANGEL	2019-26763	PROPERTY REPORTED IN ERROR 105381	CI02ADVLTAX	22.90
CHACON ANGEL	2019-26763	PROPERTY REPORTED IN ERROR 105381	C PEN FEE	3.53
CRESS BROS PLBG & HEATING	2020-31684	business closed 105381	CI02ADVLTAX	64.81
CRESS BROS PLBG & HEATING	2020-31684	business closed 105381	C PEN FEE	9.99
CRESS BROS PLBG & HEATING	2020-31684	business closed 105381	C ADVLTAX	99.92
CRESS BROS PLBG & HEATING	2020-31684	business closed 105381	CIDTADVLTAX	31.06
CRESS BROS PLBG & HEATING	2020-31684	business closed 105381	CIDTPEN FEE	3.11
CRESS BROS PLBG & HEATING	2020-31684	business closed 105381	CI02PEN FEE	6.48
GALVAN INDUSTRIES INC	2020-982	BOER DECISION. NCGS 105-312. THE BOARD	C PEN FEE	517.29
GALVAN INDUSTRIES INC	2020-982	BOER DECISION. NCGS 105-312. THE BOARD	CI01PEN FEE	248.16
MATTHEWS ROBIN ELIZABETH	2021-500953		C ADVLTAX	-29.97
MATTHEWS ROBIN ELIZABETH	2021-500953		FR16ADVLTAX	-4.78
MATTHEWS ROBIN ELIZABETH	2021-500953	value appeal 105317	C ADVLTAX	129.87
MATTHEWS ROBIN ELIZABETH	2021-500953	VALUE APPEAL 105317	C ADVLTAX	29.97
MATTHEWS ROBIN ELIZABETH	2021-500953	VALUE APPEAL 105317	FR16ADVLTAX	4.78
MATTHEWS ROBIN ELIZABETH	2021-500953	value appeal 105317	FR16ADVLTAX	20.71
MCKAY EDWARD	2020-69707	DUPLICATE TAXATION, 105-381	C ADVLTAX	20.94
MCKAY EDWARD	2020-69707	DUPLICATE TAXATION, 105-381	C PEN FEE	2.09
MCKAY EDWARD	2020-69707	DUPLICATE TAXATION, 105-381	CI06ADVLTAX	6.23
MCKAY EDWARD	2020-69707	DUPLICATE TAXATION, 105-381	CI06PEN FEE	0.63
OLSON JEFFREY C	2020-754	INFORMAL VALUE APPEAL. NCGS 105-317.	CI02ADVLTAX	79.20
OLSON JEFFREY C	2020-754	INFORMAL VALUE APPEAL. NCGS 105-317.	CI02PEN FEE	7.92
OLSON JEFFREY C	2020-754	INFORMAL VALUE APPEAL. NCGS 105-317.	C ADVLTAX	122.10
OLSON JEFFREY C	2020-754	INFORMAL VALUE APPEAL. NCGS 105-317.	C PEN FEE	12.21
PRICE REGINALD BERNARD	2018-81482	GR Expired-No payment	C GARNFEE	120.00
REDMAN HOWELL B	2020-85425	Ms Redman provided documentation from	C	25.00
REDMAN HOWELL B	2020-85425	Ms Redman provided documentation from	C BDCKPEN	195.00
SHIVERS LARRY D	2020-92794	Mr. Shivers provided statement from	C	25.00
SHIVERS LARRY D	2020-92794	Mr. Shivers provided statement from	C BDCKPEN	415.00
SUMMERS CLIFFORD L II	2020-98565	BOER: PER GENERAL STATUTE 105-322	C ADVLTAX	3390.09
SUMMERS CLIFFORD L II	2020-98565		FR13ADVLTAX	-421.47
SUMMERS CLIFFORD L II	2020-98565	BOER: PER GENERAL STATUTE 105-322	FR13ADVLTAX	421.47
SUMMERS CLIFFORD L II	2020-98565		FR13ADVLTAX	-421.47
SUMMERS CLIFFORD L II	2020-98565		FR13ADVLTAX	421.48
SUMMERS CLIFFORD L II	2020-98565	BOER: PER GENERAL STATUTE 105-322	FR13ADVLTAX	421.47
SUMMERS CLIFFORD L II	2020-98565		C ADVLTAX	3390.09
SUMMERS CLIFFORD L II	2020-98565		C ADVLTAX	-3390.09
SUMMERS CLIFFORD L II	2020-98565	BOER: PER GENERAL STATUTE 105-322	C ADVLTAX	3390.09
SUMMERS CLIFFORD L II	2020-98565		C ADVLTAX	-3390.09
SUMMERS CLIFFORD L II	2020-160	BOER: PER GENERAL STATUTE 105-322	C ADVLTAX	2684.92
SUMMERS CLIFFORD L II	2020-160	BOER: PER GENERAL STATUTE 105-322	FR13ADVLTAX	352.88
SUMMERS CLIFFORD L II	2020-161	BOER: PER GENERAL STATUTE 105-322	C ADVLTAX	2761.63
SUMMERS CLIFFORD L II	2020-161	BOER: PER GENERAL STATUTE 105-322	FR13ADVLTAX	352.88
SUMMERS CLIFFORD L II	2020-162	BOER: PER GENERAL STATUTE 105-322	C ADVLTAX	2838.34
SUMMERS CLIFFORD L II	2020-162	BOER: PER GENERAL STATUTE 105-322	FR13ADVLTAX	352.88
THE CANA GROUP LLC	2020-100526	G.S. 105-381 TAXPAYER REMEDY MISSED	C ADVLTAX	1960.78
THE CANA GROUP LLC	2020-100526	G.S. 105-381 TAXPAYER REMEDY MISSED	CI04ADVLTAX	1669.31
VELL'S SOUL FOOD LLC	2020-104346		C ADVLTAX	-78.48
VELL'S SOUL FOOD LLC	2020-104346		CI04ADVLTAX	-66.81
VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04ADVLTAX	248.61
VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04PEN FEE	24.86
VELL'S SOUL FOOD LLC	2020-104346		CI04PEN FEE	-6.68
VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04PEN FEE	6.68
VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C ADVLTAX	78.48

VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	292.02
VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	29.20
VELL'S SOUL FOOD LLC	2019-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	377.32
VELL'S SOUL FOOD LLC	2019-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	37.73
VELL'S SOUL FOOD LLC	2019-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04ADVL TAX		321.23
VELL'S SOUL FOOD LLC	2019-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04PEN FEE		32.12
VELL'S SOUL FOOD LLC	2019-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	441.82
VELL'S SOUL FOOD LLC	2019-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	88.37
VELL'S SOUL FOOD LLC	2019-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04ADVL TAX		386.59
VELL'S SOUL FOOD LLC	2019-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04PEN FEE		77.32
VELL'S SOUL FOOD LLC	2019-713	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	510.24
VELL'S SOUL FOOD LLC	2019-713	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	153.07
VELL'S SOUL FOOD LLC	2019-713	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04ADVL TAX		459.21
VELL'S SOUL FOOD LLC	2019-713	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04PEN FEE		137.77
VELL'S SOUL FOOD LLC	2019-714	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	590.93
VELL'S SOUL FOOD LLC	2019-714	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	236.37
VELL'S SOUL FOOD LLC	2019-714	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04ADVL TAX		531.83
VELL'S SOUL FOOD LLC	2019-714	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04PEN FEE		212.74
VELL'S SOUL FOOD LLC	2019-715	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	655.48
VELL'S SOUL FOOD LLC	2019-715	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	327.74
VELL'S SOUL FOOD LLC	2019-715	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04ADVL TAX		589.93
VELL'S SOUL FOOD LLC	2019-715	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04PEN FEE		294.96
VELL'S SOUL FOOD LLC	2020-104346		C	PEN FEE	-7.85
VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	7.85
VELL'S SOUL FOOD LLC	2020-104346	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI04ADVL TAX		66.81
VERLA ISIDORE ANYE	2020-504688	DUPLICATE TAX 105381	C	ADVL TAX	54.91
VERLA ISIDORE ANYE	2020-504688	DUPLICATE TAX 105381	CI01ADVL TAX		26.34
VIP TRANSPORT INC	2020-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI02PEN FEE		44.38
VIP TRANSPORT INC	2020-712		CI02PEN FEE		-44.38
VIP TRANSPORT INC	2020-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	221.87
VIP TRANSPORT INC	2020-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	66.56
VIP TRANSPORT INC	2020-712		C	PEN FEE	-66.56
VIP TRANSPORT INC	2020-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	ADVL TAX	295.51
VIP TRANSPORT INC	2020-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI02ADVL TAX		202.63
VIP TRANSPORT INC	2020-711		CI02ADVL TAX		-202.63
VIP TRANSPORT INC	2020-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI02PEN FEE		81.06
VIP TRANSPORT INC	2020-711		CI02PEN FEE		-81.06
VIP TRANSPORT INC	2020-711		C	ADVL TAX	-295.51
VIP TRANSPORT INC	2020-711	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	C	PEN FEE	118.21
VIP TRANSPORT INC	2020-711		C	PEN FEE	-118.21
VIP TRANSPORT INC	2020-712	CLERICAL ERROR/ILLEGAL TAX. NCGS 105-	CI02ADVL TAX		147.91
VIP TRANSPORT INC	2020-712		C	ADVL TAX	-221.87
VIP TRANSPORT INC	2020-712		CI02ADVL TAX		-147.91
VULJANIC DANIEL JOSEPH	2021-500567	TAX JURISDICTION 105381	C	ADVL TAX	128.20
VULJANIC DANIEL JOSEPH	2021-500567	TAX JURISDICTION 105381	CI02ADVL TAX		83.16
WHITSON LLOYD LAWSON JR	2020-108171	NO LONGER OWNED 105381	C	ADVL TAX	256.26
WHITSON LLOYD LAWSON JR	2020-108171	NO LONGER OWNED 105381	FR04ADVL TAX		25.97
WHITSON LLOYD LAWSON JR	2020-108171	NO LONGER OWNED 105381	FR04PEN FEE		2.60
WHITSON LLOYD LAWSON JR	2020-108171	NO LONGER OWNED 105381	C	PEN FEE	25.63
WINDY HILLS FARM LLC	2020-366	PRESENT USE VALUATION CHANGE: PROPERTY	FR14ADVL TAX		191.97
WINDY HILLS FARM LLC	2020-366	PRESENT USE VALUATION CHANGE: PROPERTY	C	ADVL TAX	2239.65
WINDY HILLS FARM LLC	2020-367	PRESENT USE VALUATION CHANGE: PROPERTY	C	ADVL TAX	2303.64
WINDY HILLS FARM LLC	2020-367	PRESENT USE VALUATION CHANGE: PROPERTY	FR14ADVL TAX		191.97
WINDY HILLS FARM LLC	2020-368	PRESENT USE VALUATION CHANGE: PROPERTY	C	ADVL TAX	2367.63
WINDY HILLS FARM LLC	2020-368	PRESENT USE VALUATION CHANGE: PROPERTY	FR14ADVL TAX		223.97
WINDY HILLS FARM LLC	2020-109628	PRESENT USE VALUATION CHANGE: PROPERTY	C	ADVL TAX	1796.50
WINDY HILLS FARM LLC	2020-109628	PRESENT USE VALUATION CHANGE: PROPERTY	FR14ADVL TAX		169.94
WINTERS DAVID ALAN	2020-503327	tax jurisdiction 105381	C	ADVL TAX	191.64
WINTERS DAVID ALAN	2020-503327	tax jurisdiction 105381	CI04ADVL TAX		163.15



# North Carolina Vehicle Tax System

## NCVTS Pending Refund report

Report Date 2/1/2021 10:28:21 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
ALEXANDER, THERESA EVERY	ALEXANDER, THERESA EVERY		3978 CARL PARMER DR	HARRISBURG, NC 28075	Proration	0028669106	DLF4477	PENDING	138413460	Refund Generated due to proration on Bill #0028669106-2020-0000-00	Vehicle Sold	01/15/2021	C ADVL	Tax	(\$10.49)	\$0.00	(\$10.49)
													CI01ADVL	Tax	(\$5.03)	\$0.00	(\$5.03)
													Refund	\$15.52			
BOCCIA, AMANDA MARIE	BOCCIA, AMANDA MARIE		8800 FLOWES STORE RD	CONCORD, NC 28025	Proration	0057770137	HLN7527	PENDING	139220728	Refund Generated due to proration on Bill #0057770137-2020-0000-00	Vehicle Totalled	01/28/2021	C ADVL	Tax	(\$92.35)	\$0.00	(\$92.35)
													FR14ADVL	Tax	(\$8.74)	\$0.00	(\$8.74)
													Refund	\$101.09			
BOST, BOBBY BEAVER JR	BOST, BOBBY BEAVER JR		801 CLOISTER CT NW	CONCORD, NC 28027	Proration	0058356060	TEK7623	PENDING	206874381	Refund Generated due to proration on Bill #0058356060-2020-2020-0000-00	Vehicle Totalled	01/04/2021	C ADVL	Tax	(\$13.39)	\$0.00	(\$13.39)
													CI02ADVL	Tax	(\$8.69)	\$0.00	(\$8.69)
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
													Refund	\$52.08			
CAPORALE, LEIGH-ANN	CAPORALE, LEIGH-ANN		PO BOX 1462	PONTE VEDRA, FL 32004	Proration	0052857599	TCC5132	PENDING	208707879	Refund Generated due to proration on Bill #0052857599-2019-2019-0000-00	Reg. Out of state	01/27/2021	C ADVL	Tax	(\$45.23)	\$0.00	(\$45.23)
													CI02ADVL	Tax	(\$29.34)	\$0.00	(\$29.34)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
													Refund	\$74.57			
CAREY, DONNA LEE	CAREY, DONNA LEE		2114 LAFAYETTE CIR	LITTLE RIVER, SC 29655	Proration	0014350785	TSV5326	PENDING	138001198	Refund Generated due to proration on Bill #0014350785-2019-0000-00	Reg. Out of state	01/05/2021	C ADVL	Tax	(\$6.39)	\$0.00	(\$6.39)
													CI01ADVL	Tax	(\$3.06)	\$0.00	(\$3.06)
													Refund	\$9.45			
CAREY, DONNA LEE	CAREY, DONNA LEE		2114 LAFAYETTE CIR	LITTLE RIVER, SC 29655	Proration	0019815608	CDL4255	PENDING	138001184	Refund Generated due to proration on Bill #0019815608-2019-0000-00	Reg. Out of state	01/05/2021	C ADVL	Tax	(\$28.36)	\$0.00	(\$28.36)
													CI01ADVL	Tax	(\$13.60)	\$0.00	(\$13.60)
													Refund	\$41.96			
CAREY, ROGER DALE	CAREY, ROGER DALE		2114 LAFAYETTE CIR	LITTLE RIVER, SC 29566	Proration	0018009945	4A3432	PENDING	138001136	Refund Generated due to proration on Bill #0018009945-2019-0000-00	Reg. Out of state	01/05/2021	C ADVL	Tax	(\$26.80)	\$0.00	(\$26.80)
													CI01ADVL	Tax	(\$12.86)	\$0.00	(\$12.86)
													Refund	\$39.66			
CAREY, ROGER DALE	CAREY, ROGER DALE		2114 LAFAYETTE CIR	LITTLE RIVER, SC 29655	Proration	0054024271	AFX8697	PENDING	138001148	Refund Generated due to proration on Bill #0054024271-2019-0000-00	Reg. Out of state	01/05/2021	C ADVL	Tax	(\$128.59)	\$0.00	(\$128.59)
													CI01ADVL	Tax	(\$61.69)	\$0.00	(\$61.69)
													Refund	\$190.28			
CARTER, JOYCE MCCORMICK	CARTER, JOYCE MCCORMICK	CARTER, SAMUEL MILAM	1617 ANDOVER ST NW	CONCORD, NC 28027	Adjustment < \$100	0050989980	HEJ2018	PENDING	207291258	Refund Generated due to adjustment on Bill #0050989980-2020-2020-0000-00	Mileage	01/08/2021	C ADVL	Tax	(\$9.73)	\$0.00	(\$9.73)
													CI02ADVL	Tax	(\$6.31)	\$0.00	(\$6.31)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
													Refund	\$16.04			
CLAY, JAMES ALAN	CLAY, JAMES ALAN		4044 MORRIS BURN DR SW	CONCORD, NC 28027	Proration	0047750682	ACXTC	PENDING	207516294	Refund Generated due to proration on Bill #0047750682-2019-2019-0000-00	Vehicle Sold	01/12/2021	C ADVL	Tax	(\$95.02)	\$0.00	(\$95.02)
													CI02ADVL	Tax	(\$61.63)	\$0.00	(\$61.63)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
													Refund	\$156.65			
CLIFTON, DAN CRAIG	CLIFTON, DAN CRAIG		3732 COCHRAN RD SW	CONCORD, NC 28027	Proration	0040326088	FBZ6672	PENDING	207985215	Refund Generated due to proration on Bill #0040326088-2020-2020-0000-00	Vehicle Sold	01/19/2021	C ADVL	Tax	(\$85.10)	\$0.00	(\$85.10)
													CI02ADVL	Tax	(\$55.20)	\$0.00	(\$55.20)
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
													Refund	\$170.30			
CLINKSCALES, STMEKIA JONNI	CLINKSCALES, STMEKIA JONNI		3185 PATRICK HENRY DR NE	CONCORD, NC 28027	Proration	0039759469	DLF9592	PENDING	208104510	Refund Generated due to proration on Bill #0039759469-2020-2020-0000-00	Vehicle Sold	01/21/2021	C ADVL	Tax	(\$42.24)	\$0.00	(\$42.24)
													CI02ADVL	Tax	(\$27.40)	\$0.00	(\$27.40)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
													Refund	\$69.64			
COLLINS, GEORGE RICHARD	COLLINS, GEORGE RICHARD		268 POST OAK AVE SW	CONCORD, NC 28025	Adjustment >= \$100	0051206623	WRC6066	PENDING	276272648	Refund Generated due to adjustment on Bill #0051206623-2020-2020-0000-00	Situs error	01/07/2021	C ADVL	Tax	\$0.00	\$0.00	\$0.00
													CI02ADVL	Tax	(\$93.07)	\$0.00	(\$93.07)
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
													FR03ADVL	Tax	\$11.63	\$0.00	\$11.63
													Refund	\$111.44			
DIBENEDETTO, MELANIE STELLA	DIBENEDETTO, MELANIE STELLA		230 LAVERNE DR SW	CONCORD, NC 28025	Proration	0040893057	FBZ9854	PENDING	208831425	Refund Generated due to proration on Bill #0040893057-2019-2019-0000-00	Vehicle Totalled	01/28/2021	C ADVL	Tax	(\$8.31)	\$0.00	(\$8.31)
													CI02ADVL	Tax	(\$5.39)	\$0.00	(\$5.39)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
													Refund	\$13.70			
DICKASON, DELORES MCELVEEN	DICKASON, DELORES MCELVEEN		3105 CAL BOST RD	MIDLAND, NC 28107	Proration	0000770715	XVE5211	PENDING	138193920	Refund Generated due to proration on Bill #0000770715-2018-0000-0000-00	Reg. Out of state	01/08/2021	C ADVL	Tax	(\$17.85)	\$0.00	(\$17.85)
													FR14ADVL	Tax	(\$1.49)	\$0.00	(\$1.49)
													Refund	\$19.34			
DOUGLAS, MARK WADDELL	DOUGLAS, MARK WADDELL	DOUGLAS, LINDA BRAGG	3630 BINGHAM DR NW	CONCORD, NC 28027	Proration	0054232482	TCE8715	PENDING	207618732	Refund Generated due to proration on Bill #0054232482-2019-2019-0000-00	Vehicle Sold	01/13/2021	C ADVL	Tax	(\$14.43)	\$0.00	(\$14.43)
													CI02ADVL	Tax	(\$9.36)	\$0.00	(\$9.36)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
													Refund	\$23.79			
ENDRES, GARY STEVEN	ENDRES, GARY STEVEN		4107 BURNAGE HALL RD	HARRISBURG, NC 28075	Proration	0042690340	FEH3916	PENDING	138736702	Refund Generated due to proration on Bill #0042690340-2019-0000-0000-00	Vehicle Sold	01/21/2021	C ADVL	Tax	(\$39.29)	\$0.00	(\$39.29)
													CI01ADVL	Tax	(\$18.85)	\$0.00	(\$18.85)
													Refund	\$58.14			
ENDRES, KAY MICHELE	ENDRES, KAY MICHELE		4107 BURNAGE HALL	HARRISBURG, NC 28075	Proration	0042690023	4BENHC	PENDING	138736694	Refund Generated due to proration on Bill #0042690023-2019-0000-0000-00	Vehicle Sold	01/21/2021	C ADVL	Tax	(\$22.47)	\$0.00	(\$22.47)
													CI01ADVL	Tax	(\$10.78)	\$0.00	(\$10.78)



# North Carolina Vehicle Tax System

## NCVTS Pending Refund report

Report Date 2/1/2021 10:28:21 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
FAGGERT, BEVERLY SMITH	FAGGERT, BEVERLY SMITH	FAGGART, ISAAH DELANTE	RD 344 AMBER CT SW	CONCORD, NC 28025	Proration	0051499519	HEV1822	PENDING	207985023	#0042690023-2019- Refund Generated due to proration on Bill #0051499519-2019-2019-0000-00	Vehicle Totalled	01/19/2021	C ADVL	Tax	(\$58.71)	\$0.00	(\$58.71)
													CI02ADVL	Tax	(\$38.08)	\$0.00	(\$38.08)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$96.79
GANTER, JOY LYNN	GANTER, JOY LYNN		66 MCCACHERN BLVD SE	CONCORD, NC 28026	Proration	0050460053	FLF9662	PENDING	276272544	Refund Generated due to proration on Bill #0050460053-2019-2019-0000-00	Vehicle Totalled	01/07/2021	C ADVL	Tax	(\$25.25)	\$0.00	(\$25.25)
													CI02ADVL	Tax	(\$16.38)	\$0.00	(\$16.38)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
													CIDTADVL	Tax	(\$7.85)	\$0.00	(\$7.85)
																	Refund \$49.48
GARVEN, GEORGE WILLIAM	GARVEN, GEORGE WILLIAM	GARVEN, KATHRYN GILCHRIST	166 RIVERPOINT DR	CLEMSON, SC 29631	Proration	0053947332	EKT6193	PENDING	207516537	Refund Generated due to proration on Bill #0053947332-2019-2019-0000-00	Reg. Out of state	01/12/2021	C ADVL	Tax	(\$209.96)	\$0.00	(\$209.96)
													CI02ADVL	Tax	(\$136.19)	\$0.00	(\$136.19)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$346.15
GONZALEZ, RAFAEL MANUEL	GONZALEZ, RAFAEL MANUEL		1308 MELON COLONY AVE SW	CONCORD, NC 28027	Proration	0058330789	JAL9530	PENDING	207620631	Refund Generated due to proration on Bill #0058330789-2020-2020-0000-00	Vehicle Sold	01/15/2021	C ADVL	Tax	(\$43.64)	\$0.00	(\$43.64)
													CI02ADVL	Tax	(\$28.31)	\$0.00	(\$28.31)
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
																	Refund \$101.95
HEGEDUS, KIMBERLY ROBBINS	HEGEDUS, KIMBERLY ROBBINS		7102 FOUNDERS WAY	HARRISBURG, NC 28075	Proration	0049505299	EMV8592	PENDING	138976614	Refund Generated due to proration on Bill #0049505299-2019-2019-0000-00	Vehicle Totalled	01/25/2021	C ADVL	Tax	(\$24.95)	\$0.00	(\$24.95)
													CI01ADVL	Tax	(\$11.97)	\$0.00	(\$11.97)
																	Refund \$36.92
HENDERSON, DAVID DOUGLAS	HENDERSON, DAVID DOUGLAS		7944 WOODMERE DR	HARRISBURG, NC 28075	Proration	0044796432	FJN3378	PENDING	138344360	Refund Generated due to proration on Bill #0044796432-2020-2020-0000-00	Vehicle Sold	01/12/2021	C ADVL	Tax	(\$36.30)	\$0.00	(\$36.30)
													CI01ADVL	Tax	(\$17.41)	\$0.00	(\$17.41)
																	Refund \$53.71
HUMPHRIES, DEAN WADDELL	HUMPHRIES, DEAN WADDELL	HUMPHRIES, GWENDOLYN BROOK	766 GRANDVIEW DR NE	CONCORD, NC 28025	Proration	0009212226	AJW8843	PENDING	208935729	Refund Generated due to proration on Bill #0009212226-2020-2020-0000-00	Vehicle Sold	01/29/2021	C ADVL	Tax	(\$45.07)	\$0.00	(\$45.07)
													CI02ADVL	Tax	(\$29.23)	\$0.00	(\$29.23)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$74.30
HUNTLEY, DONNA CLAY	HUNTLEY, DONNA CLAY	HUNTLEY, SAMUEL FLAVAL	2205 TORTUGA LN	NORTH MYRTLE BEACH, SC 29582	Proration	0042956456	CCJ9623	PENDING	207291408	Refund Generated due to proration on Bill #0042956456-2019-2019-0000-00	Reg. Out of state	01/08/2021	C ADVL	Tax	(\$184.59)	\$0.00	(\$184.59)
													CI02ADVL	Tax	(\$119.74)	\$0.00	(\$119.74)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$304.33
HUNTLEY, SAMUEL FLAVAL	HUNTLEY, SAMUEL FLAVAL	HUNTLEY, DONNA CLAY	2205 TORTUGA LN	NORTH MYRTLE BEACH, SC 29582	Proration	0056490399	HLJ3120	PENDING	207291411	Refund Generated due to proration on Bill #0056490399-2020-2020-0000-00	Reg. Out of state	01/08/2021	C ADVL	Tax	(\$48.49)	\$0.00	(\$48.49)
													CI02ADVL	Tax	(\$31.45)	\$0.00	(\$31.45)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$79.94
HURLEY, ROBERT LEE	HURLEY, ROBERT LEE	HURLEY, BARBARA ANN MILLER	15910 GLENMORE RD	GOLD HILL, NC 28071	Proration	0056770510	EKD4048	PENDING	138737336	Refund Generated due to proration on Bill #0056770510-2020-2020-0000-00	Vehicle Sold	01/22/2021	C ADVL	Tax	(\$212.64)	\$0.00	(\$212.64)
													FR18ADVL	Tax	(\$20.11)	\$0.00	(\$20.11)
																	Refund \$232.75
HYDRO CONDUIT CORP	HYDRO CONDUIT CORP		208 RANDOLPH ST	THOMASVILLE, NC 27360	Adjustment >= \$100	0058776793	FBL5862	PENDING	139220638	Refund Generated due to adjustment on Bill #0058776793-2020-2020-0000-00	Mileage	01/28/2021	C ADVL	Tax	(\$68.23)	\$0.00	(\$68.23)
													CI01ADVL	Tax	(\$32.73)	\$0.00	(\$32.73)
																	Refund \$100.96
ISHWAD, CHANDRAMOHAN	ISHWAD, CHANDRAMOHAN	ISHWAD, PALLAVI CHANDRAMOHAN	4817 ANNELISE DR	HARRISBURG, NC 28075	Proration	0040027686	EJF5076	PENDING	138413398	Refund Generated due to proration on Bill #0040027686-2019-2019-0000-00	Vehicle Sold	01/15/2021	C ADVL	Tax	(\$9.05)	\$0.00	(\$9.05)
													CI01ADVL	Tax	(\$4.34)	\$0.00	(\$4.34)
																	Refund \$13.39
JIMENEZ, MILCIADES LEONIDAS	JIMENEZ, MILCIADES LEONIDAS	JIMENEZ, KARINA DOLORES	858 SUNDERLAND RD SW	CONCORD, NC 28027	Proration	0040922168	PJF7871	PENDING	206874231	Refund Generated due to proration on Bill #0040922168-2019-2019-0000-00	Vehicle Totalled	01/04/2021	C ADVL	Tax	(\$14.26)	\$0.00	(\$14.26)
													CI02ADVL	Tax	(\$9.25)	\$0.00	(\$9.25)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$23.51
JOSHI, PRASHANT JAGDEEP	JOSHI, PRASHANT JAGDEEP		9536 PACING LN NW	CONCORD, NC 28027	Proration	0057238277	FJM5171	PENDING	208707780	Refund Generated due to proration on Bill #0057238277-2019-2019-0000-00	Vehicle Sold	01/27/2021	C ADVL	Tax	(\$7.85)	\$0.00	(\$7.85)
													CI02ADVL	Tax	(\$5.09)	\$0.00	(\$5.09)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$12.94
KAUR, DAMANJIT	KAUR, DAMANJIT		771 BAROSSA VALLEY DR NW	CONCORD, NC 28027	Proration	0033109341	CAP4007	PENDING	207516570	Refund Generated due to proration on Bill #0033109341-2019-2019-0000-00	Vehicle Sold	01/12/2021	C ADVL	Tax	(\$39.50)	\$0.00	(\$39.50)
													CI02ADVL	Tax	(\$25.62)	\$0.00	(\$25.62)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																	Refund \$65.12
KENNY, MARGARET ANNE	KENNY, MARGARET ANNE		8208 ADDISON DR	HARRISBURG, NC 28075	Proration	0055709653	TNX1714	PENDING	139051430	Refund Generated due to proration on Bill #0055709653-2020-2020-0000-00	Vehicle Sold	01/26/2021	C ADVL	Tax	(\$35.46)	\$0.00	(\$35.46)
													FR07ADVL	Tax	(\$7.19)	\$0.00	(\$7.19)
																	Refund \$42.65
KING, KIMBERLY CHATHAM	KING, KIMBERLY CHATHAM		4635 ST STEPHENS CH RD	GOLD HILL, NC 28071	Proration	0009886575	ZXK3578	PENDING	138657038	Refund Generated due to proration on Bill #0009886575-2019-2019-0000-00	Vehicle Sold	01/19/2021	C ADVL	Tax	(\$7.68)	\$0.00	(\$7.68)
													FR17ADVL	Tax	(\$0.83)	\$0.00	(\$0.83)
																	Refund \$8.51



# North Carolina Vehicle Tax System

## NCVTS Pending Refund report

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
KING, RICHARD LEE	KING, RICHARD LEE	KING, KIMBERLY CHATHAM	4635 ST STEPHENS CH ROAD	GOLD HILL, NC 28071	Proration	0000888950	YRZ7447	PENDING	138657034	Refund Generated due to proration on Bill #0000888950-2019-0000-00-00	Vehicle Sold	01/19/2021	C ADVL	Tax	(\$9.87)	\$0.00	(\$9.87)
													FR17ADVL	Tax	(\$1.07)	\$0.00	(\$1.07)
																Refund	\$10.94
KIRBY, RANDY WADE	KIRBY, RANDY WADE	KIRBY, PAMELA CONNER	6410 LYNWOOD DR NW	CONCORD, NC 28027	Proration	0042433346	ELY5169	PENDING	206874375	Refund Generated due to proration on Bill #0042433346-2019-2019-0000-00	Vehicle Sold	01/04/2021	C ADVL	Tax	(\$828.76)	\$0.00	(\$828.76)
													CI02ADVL	Tax	(\$537.57)	\$0.00	(\$537.57)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$1366.33
KOWALIK, HENRY FRANCIS	KOWALIK, HENRY FRANCIS		4320 27TH AVE NE	NAPLES, FL 34120	Proration	0049210173	PKV9638	PENDING	207516258	Refund Generated due to proration on Bill #0049210173-2020-2020-0000-00	Reg. Out of state	01/12/2021	C ADVL	Tax	(\$249.97)	\$0.00	(\$249.97)
													CI02ADVL	Tax	(\$162.14)	\$0.00	(\$162.14)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$412.11
LAUTZ, AMY BETH	LAUTZ, AMY BETH		7727 WHISPERINGWOOD DR	HARRISBURG, NC 28075	Adjustment < \$100	0058076248	HLN5597	PENDING	138001384	Refund Generated due to adjustment on Bill #0058076248-2020-0000-00-00	Over Assessment	01/05/2021	C ADVL	Tax	(\$37.40)	\$0.00	(\$37.40)
													CI01ADVL	Tax	(\$17.94)	\$0.00	(\$17.94)
																Refund	\$55.34
LAWING, SYLVIA SMOTHERS	LAWING, SYLVIA SMOTHERS		501 CADILLAC ST	KANNAPOLIS, NC 28083	Proration	0030063197	XXB7468	PENDING	207617979	Refund Generated due to proration on Bill #0030063197-2019-2019-0000-00	Vehicle Sold	01/13/2021	C ADVL	Tax	(\$12.04)	\$0.00	(\$12.04)
													CI04ADVL	Tax	(\$10.25)	\$0.00	(\$10.25)
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$22.29
LAWING, SYLVIA SMOTHERS	LAWING, SYLVIA SMOTHERS		501 CADILLAC ST	KANNAPOLIS, NC 28083	Proration	0014348297	ECJ5232	PENDING	207409479	Refund Generated due to proration on Bill #0014348297-2019-2019-0000-00	Vehicle Sold	01/11/2021	C ADVL	Tax	(\$8.58)	\$0.00	(\$8.58)
													CI04ADVL	Tax	(\$7.31)	\$0.00	(\$7.31)
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$15.89
LEE, DAMIAN ORLANDO	LEE, DAMIAN ORLANDO		9509 AUTUMN FIRE AVE NW	CONCORD, NC 28027	Proration	0052088707	HEY7569	PENDING	207409440	Refund Generated due to proration on Bill #0052088707-2019-2019-0000-00	Vehicle Sold	01/11/2021	C ADVL	Tax	(\$13.28)	\$0.00	(\$13.28)
													CI02ADVL	Tax	(\$8.62)	\$0.00	(\$8.62)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$21.90
LIGHTNER, CHRISTOPHER ALLEN	LIGHTNER, CHRISTOPHER ALLEN		995 CENTRAL DR NW	CONCORD, NC 28027	Proration	0054559096	TCZ7275	PENDING	207984879	Refund Generated due to proration on Bill #0054559096-2019-2019-0000-00	Vehicle Sold	01/19/2021	C ADVL	Tax	(\$12.95)	\$0.00	(\$12.95)
													CI02ADVL	Tax	(\$8.40)	\$0.00	(\$8.40)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$21.35
LINKER, NANCY BRADSHAW	LINKER, NANCY BRADSHAW		1180 SUNDANCE DR	CONCORD, NC 28027	Proration	0034690071	P0L03	PENDING	138976578	Refund Generated due to proration on Bill #0034690071-2020-0000-00-00	Vehicle Totalled	01/25/2021	C ADVL	Tax	(\$287.06)	\$0.00	(\$287.06)
													FR11ADVL	Tax	(\$26.38)	\$0.00	(\$26.38)
																Refund	\$313.44
LOCKHART, DONALD WESLEY	LOCKHART, DONALD WESLEY		8113 KENSINGTON LN	HARRISBURG, NC 28075	Proration	0023557420	BD60226	PENDING	138412840	Refund Generated due to proration on Bill #0023557420-2019-0000-00-00	Vehicle Sold	01/14/2021	C ADVL	Tax	(\$0.74)	\$0.00	(\$0.74)
													CI01ADVL	Tax	(\$0.35)	\$0.00	(\$0.35)
																Refund	\$1.09
LOCKHART, DONALD WESLEY	LOCKHART, DONALD WESLEY		8113 KENSINGTON LN	HARRISBURG, NC 28075	Proration	0034479706	6R1421	PENDING	138412836	Refund Generated due to proration on Bill #0034479706-2020-0000-00-00	Vehicle Sold	01/14/2021	C ADVL	Tax	(\$95.09)	\$0.00	(\$95.09)
													CI01ADVL	Tax	(\$45.62)	\$0.00	(\$45.62)
																Refund	\$140.71
LOMAX, JENNA MICHELLE	LOMAX, JENNA MICHELLE		165 OBRIEN PL SW	CONCORD, NC 28025	Proration	0050559366	HDK6268	PENDING	207620115	Refund Generated due to proration on Bill #0050559366-2020-2020-0000-00	Vehicle Sold	01/15/2021	C ADVL	Tax	(\$44.79)	(\$2.23)	(\$47.02)
													CI02ADVL	Tax	(\$29.05)	(\$1.46)	(\$30.51)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$77.53
LONG, LUCIOUS KIMBROUGH JR	LONG, LUCIOUS KIMBROUGH	LONG, KIM KING	8201 CAMELOT DR	HARRISBURG, NC 28075	Proration	0000918795	WNL5058	PENDING	139290460	Refund Generated due to proration on Bill #0000918795-2020-0000-00-00	Vehicle Sold	01/29/2021	C ADVL	Tax	(\$16.37)	\$0.00	(\$16.37)
													CI01ADVL	Tax	(\$7.85)	\$0.00	(\$7.85)
																Refund	\$24.22
MALLOY, ANNETTE DELORES	MALLOY, ANNETTE DELORES		3664 LAKE SPRING AVE NW	CONCORD, NC 28027	Adjustment < \$100	0038872687	PVD6316	PENDING	207001545	Refund Generated due to adjustment on Bill #0038872687-2020-2020-0000-00	Mileage	01/05/2021	C ADVL	Tax	(\$3.90)	\$0.00	(\$3.90)
													CI02ADVL	Tax	(\$2.52)	\$0.00	(\$2.52)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$6.42
MARTINEAU, LUKE HOLLINGSWORTH	MARTINEAU, LUKE HOLLINGSWORTH		6141 CREEKVIEW CT	HARRISBURG, NC 28075	Proration	0050865035	TAK8769	PENDING	138193896	Refund Generated due to proration on Bill #0050865035-2020-0000-00-00	Vehicle Sold	01/08/2021	C ADVL	Tax	(\$11.13)	\$0.00	(\$11.13)
													CI01ADVL	Tax	(\$5.33)	\$0.00	(\$5.33)
																Refund	\$16.46
MASTRO, JOHN BATTISTA	MASTRO, JOHN BATTISTA		5709 WOODRIDGE CT NW	CONCORD, NC 28027	Proration	0037702919	DEL9844	PENDING	208105638	Refund Generated due to proration on Bill #0037702919-2019-2019-0000-00	Vehicle Sold	01/22/2021	C ADVL	Tax	(\$15.71)	\$0.00	(\$15.71)
													CI02ADVL	Tax	(\$10.19)	\$0.00	(\$10.19)
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$25.90
MAZOR, CARA LEE	MAZOR, CARA LEE	MAZOR, ERIC STUART	1106 KENTUCKY ST	KANNAPOLIS, NC 28083	Proration	0057156500	HLB5517	PENDING	207290826	Refund Generated due to proration on Bill #0057156500-2020-2020-0000-00	Vehicle Totalled	01/08/2021	C ADVL	Tax	(\$73.48)	\$0.00	(\$73.48)
													CI04ADVL	Tax	(\$62.56)	\$0.00	(\$62.56)
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00
																Refund	\$136.04
MCDONALD, KENNETH	MCDONALD, KENNETH	MCDONALD, ANN CHRISTINE	124 SPRINGWAY	KANNAPOLIS, NC 28081	Proration	0037001269	PDH7307	PENDING	208935543	Refund Generated due to proration on Bill #0037001269-2020-0000-00-00	Vehicle Totalled	01/29/2021	C ADVL	Tax	(\$18.52)	\$0.00	(\$18.52)
													CI04ADVL	Tax	(\$15.77)	\$0.00	(\$15.77)



# North Carolina Vehicle Tax System

## NCVTS Pending Refund report

Report Date 2/1/2021 10:28:21 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change	
CHARLES	CHARLES	JANCIC	DR							#0037001269-2019-2019-0000-00			CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$34.29
MORGAN, JAME CLARK	MORGAN, JAME CLARK		10019 JIM SOSSOMAN RD	MIDLAND, NC 28107	Proration	0052867867	70735	PENDING	138344492	Refund Generated due to proration on Bill #0052867867-2019-	Vehicle Sold	01/12/2021	C ADVL	Tax	(\$3.45)	\$0.00	(\$3.45)	
													CI06ADVL	Tax	(\$1.03)	\$0.00	(\$1.03)	
																	Refund	\$4.48
NICASTRO, THOMAS JOHN	NICASTRO, THOMAS JOHN		1261 BENNINGTON DR NW	CONCORD, NC 28027	Adjustment < \$100	0049200156	FHB7596	PENDING	207617736	Refund Generated due to adjustment on Bill #0049200156-2020-2020-0000-00	Over Assessment	01/13/2021	C ADVL	Tax	(\$59.79)	\$0.00	(\$59.79)	
													CI02ADVL	Tax	(\$38.78)	\$0.00	(\$38.78)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$98.57
NICHOLSON, ALEXANDER JAMES	NICHOLSON, ALEXANDER JAMES	NICHOLSON, ANNETTE BONNY	6108 VILLAGE DR	CONCORD, NC 28027	Proration	0014326185	BLM4940	PENDING	206873988	Refund Generated due to proration on Bill #0014326185-2019-2019-0000-00	Vehicle Totalled	01/04/2021	C ADVL	Tax	(\$49.04)	\$0.00	(\$49.04)	
													CI02ADVL	Tax	(\$31.81)	\$0.00	(\$31.81)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$80.85
NIESKE, CRAIG KINNEY	NIESKE, CRAIG KINNEY		9683 CAPELLA AVE NW	CONCORD, NC 28027	Proration	0050871380	CCJ7411	PENDING	207108753	Refund Generated due to proration on Bill #0050871380-2020-2020-0000-00	Vehicle Sold	01/06/2021	C ADVL	Tax	(\$70.75)	\$0.00	(\$70.75)	
													CI02ADVL	Tax	(\$45.89)	\$0.00	(\$45.89)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$116.64
NIXON, JEREMY KEITH	NIXON, JEREMY KEITH		706 PATRICIA AVE	HARRISBURG, NC 28075	Proration	0020491993	BMH8266	PENDING	138193974	Refund Generated due to proration on Bill #0020491993-2019-	Vehicle Sold	01/08/2021	C ADVL	Tax	(\$2.11)	\$0.00	(\$2.11)	
													CI01ADVL	Tax	(\$1.01)	\$0.00	(\$1.01)	
																	Refund	\$3.12
OWENS, BRIAN NATHANIEL	OWENS, BRIAN NATHANIEL	OWENS, PAULA WHATLEY	4025 OAKWOOD DR APPT 1124	CHATTANOOGA, TN 37416	Proration	0054673088	CM22628	PENDING	208935915	Refund Generated due to proration on Bill #0054673088-2019-2019-0000-00	Reg. Out of state	01/29/2021	C ADVL	Tax	(\$91.82)	\$0.00	(\$91.82)	
													CI02ADVL	Tax	(\$59.56)	\$0.00	(\$59.56)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$151.38
OWENS, BRIAN NATHANIEL	OWENS, BRIAN NATHANIEL	OWENS, PAULA WHATLEY	4025 OAKWOOD DR APPT 1124	CHATTANOOGA, TN 37416	Proration	0048239058	FJN1398	PENDING	208935879	Refund Generated due to proration on Bill #0048239058-2019-2019-0000-00	Reg. Out of state	01/29/2021	C ADVL	Tax	(\$41.39)	\$0.00	(\$41.39)	
													CI02ADVL	Tax	(\$26.85)	\$0.00	(\$26.85)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$68.24
OWENS, BRIAN NATHANIEL	OWENS, BRIAN NATHANIEL	OWENS, PAULA WHATLEY	4025 OAKWOOD DR APPT 1124	CHATTANOOGA, TN 37416	Proration	0057036603	FJN1397	PENDING	208935930	Refund Generated due to proration on Bill #0057036603-2020-2020-0000-00	Reg. Out of state	01/29/2021	C ADVL	Tax	(\$151.21)	\$0.00	(\$151.21)	
													CI02ADVL	Tax	(\$98.08)	\$0.00	(\$98.08)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$249.29
PARKER, JOSEPH MARSHALL	PARKER, JOSEPH MARSHALL		8465 FLOWES STORE RD	CONCORD, NC 28025	Proration	0036478620	DHX5985	PENDING	138976604	Refund Generated due to proration on Bill #0036478620-2019-	Vehicle Sold	01/25/2021	C ADVL	Tax	(\$41.44)	\$0.00	(\$41.44)	
													FR14ADVL	Tax	(\$3.92)	\$0.00	(\$3.92)	
																	Refund	\$45.36
PATEL, DARSHAN MAHESHCHANDRA	PATEL, DARSHAN MAHESHCHANDRA	PATEL, TRUPTI DARSHAN	2294 LAURENS DR	CONCORD, NC 28027	Proration	0019440628	AEH7280	PENDING	207290853	Refund Generated due to proration on Bill #0019440628-2019-2019-0000-00	Vehicle Sold	01/08/2021	C ADVL	Tax	(\$30.23)	\$0.00	(\$30.23)	
													CI04ADVL	Tax	(\$25.73)	\$0.00	(\$25.73)	
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$55.96
PATEL, DILIPKUMAR MANORBHAI	PATEL, DILIPKUMAR MANORBHAI		715 PITTS SCHOOL RD SW	CONCORD, NC 28027	Adjustment < \$100	0022366448	CAS1872	PENDING	208935906	Refund Generated due to adjustment on Bill #0022366448-2020-2020-0000-00	Adjustment	01/29/2021	C ADVL	Tax	(\$23.21)	\$0.00	(\$23.21)	
													CI02ADVL	Tax	(\$15.05)	\$0.00	(\$15.05)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$38.26
PATEL, NIMISHA ISHWARBHAI	PATEL, NIMISHA ISHWARBHAI		10121 STEWARTON LN	CHARLOTTE, NC 28269	Proration	0050064626	DBH8984	PENDING	207620373	Refund Generated due to proration on Bill #0050064626-2020-2020-0000-00	Vehicle Sold	01/15/2021	C ADVL	Tax	(\$176.19)	\$0.00	(\$176.19)	
													CI02ADVL	Tax	(\$114.29)	\$0.00	(\$114.29)	
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)	
																	Refund	\$320.48
PETERSON GRADING INC	PETERSON GRADING INC		3550 BIGGERS RD	CONCORD, NC 28025	Proration	0051664972	HE1235	PENDING	138136332	Refund Generated due to proration on Bill #0051664972-2019-	Vehicle Sold	01/07/2021	C ADVL	Tax	(\$132.46)	\$0.00	(\$132.46)	
													FR04ADVL	Tax	(\$13.42)	\$0.00	(\$13.42)	
																	Refund	\$145.88
PETERSON GRADING, INC.	PETERSON GRADING, INC.		3550 BIGGERS RD	CONCORD, NC 28025	Proration	0057773586	KD7338	PENDING	138136336	Refund Generated due to proration on Bill #0057773586-2020-	Vehicle Sold	01/07/2021	C ADVL	Tax	(\$402.04)	\$0.00	(\$402.04)	
													FR04ADVL	Tax	(\$40.75)	\$0.00	(\$40.75)	
																	Refund	\$442.79
RAGAN, CYNTHIA LEWIS	RAGAN, CYNTHIA LEWIS	RAGAN, KENNETH DARRELL	130 RED MAPLE DR NW	CONCORD, NC 28027	Proration	0054908296	HFL9583	PENDING	207291210	Refund Generated due to proration on Bill #0054908296-2020-2020-0000-00	Incomplete Doc	01/08/2021	C ADVL	Tax	(\$88.79)	\$0.00	(\$88.79)	
													CI02ADVL	Tax	(\$57.60)	\$0.00	(\$57.60)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$146.39
RAPER, NORRIS EUGENE	RAPER, NORRIS EUGENE		900 COACH HOUSE PL NW	CONCORD, NC 28027	Proration	0023096041	WPB6379	PENDING	207985080	Refund Generated due to proration on Bill #0023096041-2019-2019-0000-00	Vehicle Sold	01/19/2021	C ADVL	Tax	(\$8.58)	\$0.00	(\$8.58)	
													CI02ADVL	Tax	(\$5.57)	\$0.00	(\$5.57)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$14.15
RAPER, NORRIS EUGENE	RAPER, NORRIS EUGENE		900 COACH HOUSE PL NW	CONCORD, NC 28027	Proration	0018040136	WVT6815	PENDING	208576836	Refund Generated due to proration on Bill #0018040136-2019-	Vehicle Sold	01/26/2021	C ADVL	Tax	(\$11.07)	\$0.00	(\$11.07)	
													CI02ADVL	Tax	(\$7.18)	\$0.00	(\$7.18)	



# North Carolina Vehicle Tax System

## NCVTS Pending Refund report

Report Date 2/1/2021 10:28:21 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change	
EUGENE	EUGENE									#0018040136-2019-2019-0000-00			CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$18.25
RAYMOND, HEATHER COSTNER	RAYMOND, HEATHER COSTNER		3675 STONEFIELD ST SW	CONCORD, NC 28027	Proration	0052760548	HBP5139	PENDING	207002073	Refund Generated due to proration on Bill #0052760548-2019-2019-0000-00	Vehicle Sold	01/05/2021	C ADVL	Tax	(\$144.82)	\$0.00	(\$144.82)	
													CI02ADVL	Tax	(\$93.93)	\$0.00	(\$93.93)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$238.75
REDFEARN CLARK, SABRINA	REDFEARN CLARK, SABRINA		3922 OLD GLORY DR	CONCORD, NC 28025	Proration	0055160542	HJW2054	PENDING	138412576	Refund Generated due to proration on Bill #0055160542-2020-2020-0000-00	Vehicle Sold	01/13/2021	C ADVL	Tax	(\$55.57)	\$0.00	(\$55.57)	
													FR04ADVL	Tax	(\$5.63)	\$0.00	(\$5.63)	
																	Refund	\$61.20
REDIES, FRANK EDWARD	REDIES, FRANK EDWARD	REDIES, CAROLYN CARVER	4316 BRITLEY LN	HARRISBURG, NC 28075	Proration	0044956530	CDM8012	PENDING	139138600	Refund Generated due to proration on Bill #0044956530-2019-2019-0000-00	Vehicle Sold	01/27/2021	C ADVL	Tax	(\$49.26)	\$0.00	(\$49.26)	
													FR07ADVL	Tax	(\$9.99)	\$0.00	(\$9.99)	
																	Refund	\$59.25
REDIES, FRANK EDWARD	REDIES, FRANK EDWARD	REDIES, CAROLYN CARVER	4316 BRITLEY LN	HARRISBURG, NC 28075	Proration	0014350839	XVP8175	PENDING	138657042	Refund Generated due to proration on Bill #0014350839-2019-2019-0000-00	Vehicle Sold	01/19/2021	C ADVL	Tax	(\$25.71)	\$0.00	(\$25.71)	
													FR07ADVL	Tax	(\$5.21)	\$0.00	(\$5.21)	
																	Refund	\$30.92
RICHARD, JACQUES	RICHARD, JACQUES	GENTRY, KYLE ALEXANDER	1207 WINGHAVEN DR NW	CHARLOTTE, NC 28269	Adjustment < \$100	0056932783	AJX1063	PENDING	278102228	Refund Generated due to adjustment on Bill #0056932783-2020-2020-0000-00	Situs error	01/26/2021	C ADVL	Tax	\$0.00	\$0.00	\$0.00	
													CI02ADVL	Tax	(\$16.70)	\$0.00	(\$16.70)	
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)	
													FR14ADVL	Tax	\$2.44	\$0.00	\$2.44	
																	Refund	\$44.26
RICHARDS, TERRY ROBERT	RICHARDS, TERRY ROBERT		4137 AMARILLO DR	CONCORD, NC 28027	Proration	0051924568	HHK6231	PENDING	207515574	Refund Generated due to proration on Bill #0051924568-2019-2019-0000-00	Vehicle Totalled	01/12/2021	C ADVL	Tax	(\$3.48)	\$0.00	(\$3.48)	
													CI02ADVL	Tax	(\$2.26)	\$0.00	(\$2.26)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$5.74
RIVENBARK, RODNEY KEITH	RIVENBARK, RODNEY KEITH		1504 CENTRAL DR	KANNAPOLIS, NC 28083	Proration	0045387219	EER2649	PENDING	207290775	Refund Generated due to proration on Bill #0045387219-2020-2020-0000-00	Vehicle Sold	01/08/2021	C ADVL	Tax	(\$136.16)	\$0.00	(\$136.16)	
													CI04ADVL	Tax	(\$115.92)	\$0.00	(\$115.92)	
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$252.08
ROBINSON, ALEXANDER LEE	ROBINSON, ALEXANDER LEE		915 POLO AVE	KANNAPOLIS, NC 28081	Proration	0031887270	ECJ4252	PENDING	208105251	Refund Generated due to proration on Bill #0031887270-2019-2019-0000-00	Vehicle Sold	01/22/2021	C ADVL	Tax	(\$6.95)	\$0.00	(\$6.95)	
													CI04ADVL	Tax	(\$5.91)	\$0.00	(\$5.91)	
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$12.86
ROBLES, ADAN CANALES	ROBLES, ADAN CANALES		2183 HOLDEN AVE SW	CONCORD, NC 28025	Proration	0045273857	CK30310	PENDING	207620199	Refund Generated due to proration on Bill #0045273857-2020-2020-0000-00	Vehicle Totalled	01/15/2021	C ADVL	Tax	(\$357.45)	\$0.00	(\$357.45)	
													CI02ADVL	Tax	(\$231.86)	\$0.00	(\$231.86)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$589.31
ROGERS, KELVIN MARK	ROGERS, KELVIN MARK		1182 TUFTON PL NW	CONCORD, NC 28027	Proration	0034207226	TDB1748	PENDING	208935798	Refund Generated due to proration on Bill #0034207226-2020-2020-0000-00	Vehicle Sold	01/29/2021	C ADVL	Tax	(\$32.34)	\$0.00	(\$32.34)	
													CI02ADVL	Tax	(\$20.98)	\$0.00	(\$20.98)	
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)	
																	Refund	\$83.32
SCHRIEVER, ROBERT WALTER	SCHRIEVER, ROBERT WALTER		1492 SAINT ANNES CT NW	CONCORD, NC 28027	Proration	0030876197	DFZ4323	PENDING	207109029	Refund Generated due to proration on Bill #0030876197-2019-2019-0000-00	Vehicle Sold	01/06/2021	C ADVL	Tax	(\$51.76)	\$0.00	(\$51.76)	
													CI02ADVL	Tax	(\$33.57)	\$0.00	(\$33.57)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$85.33
SHAH, KIREN BHIKHABHAI	SHAH, KIREN BHIKHABHAI	SHAH, NIRAV KIRENKUMAR	2249 DONNINGTON LN NW	CONCORD, NC 28027	Proration	0028450196	AFX7467	PENDING	208104708	Refund Generated due to proration on Bill #0028450196-2019-2019-0000-00	Vehicle Sold	01/21/2021	C ADVL	Tax	(\$37.13)	\$0.00	(\$37.13)	
													CI02ADVL	Tax	(\$24.08)	\$0.00	(\$24.08)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$61.21
SHEARIN, DAVID GORHAM	SHEARIN, DAVID GORHAM		303 COOK ST	KANNAPOLIS, NC 28083	Proration	0008640971	MPS8499	PENDING	207001407	Refund Generated due to proration on Bill #0008640971-2020-2020-0000-00	Vehicle Sold	01/05/2021	C ADVL	Tax	(\$22.76)	\$0.00	(\$22.76)	
													CI04ADVL	Tax	(\$19.37)	\$0.00	(\$19.37)	
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$42.13
SHENK, STEVEN CARL	SHENK, STEVEN CARL		11915 RICELAND WAY	MIDLAND, NC 28107	Proration	0042525601	ZL1DRFUL	PENDING	138136320	Refund Generated due to proration on Bill #0042525601-2019-2019-0000-00	Vehicle Sold	01/07/2021	C ADVL	Tax	(\$131.01)	\$0.00	(\$131.01)	
													CI06ADVL	Tax	(\$38.95)	\$0.00	(\$38.95)	
																	Refund	\$169.96
SHOE SHOW INC	SHOE SHOW INC		PO BOX 648	CONCORD, NC 28026	Proration	0035453467	EFD3261	PENDING	208935600	Refund Generated due to proration on Bill #0035453467-2019-2019-0000-00	Vehicle Totalled	01/29/2021	C ADVL	Tax	(\$46.53)	\$0.00	(\$46.53)	
													CI04ADVL	Tax	(\$39.61)	\$0.00	(\$39.61)	
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$86.14
SINER, HERBERT WILLIAM III	SINER, HERBERT WILLIAM III		7051 BOST CUTOFF RD	CONCORD, NC 28025	Proration	0043145673	PJW8018	PENDING	206873817	Refund Generated due to proration on Bill #0043145673-2019-2019-0000-00	Vehicle Sold	01/04/2021	C ADVL	Tax	(\$27.38)	\$0.00	(\$27.38)	
													CI02ADVL	Tax	(\$17.76)	\$0.00	(\$17.76)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$45.14



# North Carolina Vehicle Tax System

## NCVTS Pending Refund report

Report Date 2/1/2021 10:28:21 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change	
SMITH, ALEX DAVID	SMITH, ALEX DAVID		3885 HOUNSLOW LN	HARRISBURG, NC 28075	Proration	0046529961	FDZ7594	PENDING	138343748	Refund Generated due to proration on Bill #0046529961-2019-2020-0000-00	Vehicle Totalled	01/12/2021	C ADVL	Tax	(\$60.74)	\$0.00	(\$60.74)	
													CI01ADVL	Tax	(\$29.14)	\$0.00	(\$29.14)	
																	Refund	\$89.88
SMITH, AMELIA JOY	SMITH, AMELIA JOY		57 UNION ST S APT 201	CONCORD, NC 28025	Adjustment >= \$100	0057886084	HLN5138	PENDING	277951540	Refund Generated due to adjustment on Bill #0057886084-2020-2020-0000-00	Military	01/25/2021	C ADVL	Tax	(\$101.16)	\$0.00	(\$101.16)	
													CI02ADVL	Tax	(\$65.62)	\$0.00	(\$65.62)	
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)	
													CIDTADVL	Tax	(\$31.44)	\$0.00	(\$31.44)	
																	Refund	\$228.22
SMITH, SHERISE MAHONE	SMITH, SHERISE MAHONE		4171 WHITNEY PL NW	CONCORD, NC 28027	Proration	0045907753	FAH2382	PENDING	208935888	Refund Generated due to proration on Bill #0045907753-2020-2020-0000-00	Vehicle Totalled	01/29/2021	C ADVL	Tax	(\$44.03)	(\$2.20)	(\$46.23)	
													CI02ADVL	Tax	(\$28.56)	(\$1.43)	(\$29.99)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$76.22
STACK, BETTY HUTCHISON	STACK, BETTY HUTCHISON		16 IONE CIR	WILLIAMSTON, SC 29697	Proration	0052256330	HFX9751	PENDING	138737364	Refund Generated due to proration on Bill #0052256330-2019-2020-0000-00	Reg. Out of state	01/22/2021	C ADVL	Tax	(\$45.95)	\$0.00	(\$45.95)	
													FR11ADVL	Tax	(\$4.22)	\$0.00	(\$4.22)	
																	Refund	\$50.17
STACK, RAYMOND HOAGLAND JR	STACK, RAYMOND HOAGLAND JR		16 IONE CIR	WILLIAMSTON, SC 29697	Proration	0036851828	EDF4411	PENDING	138737340	Refund Generated due to proration on Bill #0036851828-2019-2020-0000-00	Reg. Out of state	01/22/2021	C ADVL	Tax	(\$100.15)	\$0.00	(\$100.15)	
													FR11ADVL	Tax	(\$9.20)	\$0.00	(\$9.20)	
																	Refund	\$109.35
STANCIL, JAMES RICKY	STANCIL, JAMES RICKY		2005 SONGWOOD RD	CONCORD, NC 28025	Proration	0045246746	RZK3640	PENDING	138412758	Refund Generated due to proration on Bill #0045246746-2020-2020-0000-00	Vehicle Sold	01/14/2021	C ADVL	Tax	(\$72.37)	\$0.00	(\$72.37)	
													FR03ADVL	Tax	(\$5.87)	\$0.00	(\$5.87)	
																	Refund	\$78.24
STEPHENS, MICHAEL LYNN	STEPHENS, MICHAEL LYNN		162 EASTOVER DR SE	CONCORD, NC 28025	Proration	0056750002	BKK5905	PENDING	208935777	Refund Generated due to proration on Bill #0056750002-2020-2020-0000-00	Vehicle Sold	01/29/2021	C ADVL	Tax	(\$23.01)	\$0.00	(\$23.01)	
													CI02ADVL	Tax	(\$14.93)	\$0.00	(\$14.93)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$37.94
STRUBECK, MARGARET ANN	STRUBECK, MARGARET ANN		5351 HACKBERRY LN SW	CONCORD, NC 28027	Proration	0043492348	EFT1164	PENDING	208707906	Refund Generated due to proration on Bill #0043492348-2020-2020-0000-00	Vehicle Sold	01/27/2021	C ADVL	Tax	(\$98.67)	\$0.00	(\$98.67)	
													CI02ADVL	Tax	(\$64.00)	\$0.00	(\$64.00)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$162.67
SWEAT, JOHN ALEXANDER JR	SWEAT, JOHN ALEXANDER JR		1114 MATCHSTICK PL SW	CONCORD, NC 28025	Proration	0040369174	TD9148	PENDING	208576440	Refund Generated due to proration on Bill #0040369174-2020-2020-0000-00	Vehicle Sold	01/26/2021	C ADVL	Tax	(\$34.22)	\$0.00	(\$34.22)	
													CI02ADVL	Tax	(\$22.20)	\$0.00	(\$22.20)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$56.42
TESH-TROXLER LANDSCAPES & DESIGN INC	TESH-TROXLER LANDSCAPES & DESIGN INC		3130 HELGAR RD	CONCORD, NC 28025	Adjustment >= \$100	0057549598	KF8309	PENDING	277471488	Refund Generated due to adjustment on Bill #0057549598-2020-2020-0000-00	Situs error	01/20/2021	C ADVL	Tax	\$0.00	\$0.00	\$0.00	
													CI02ADVL	Tax	(\$23.20)	(\$11.16)	(\$34.36)	
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)	
													FR04ADVL	Tax	\$34.88	\$1.74	\$36.62	
																	Refund	\$227.74
THOMAS, KENNETH NEAL JR	THOMAS, KENNETH NEAL JR		1720 BEN BLACK RD	MIDLAND, NC 28107	Adjustment < \$100	0044635091	JAB2373	PENDING	138072764	Refund Generated due to adjustment on Bill #0044635091-2020-2020-0000-00	Damage	01/06/2021	C ADVL	Tax	(\$22.80)	\$0.00	(\$22.80)	
													FR05ADVL	Tax	(\$3.08)	\$0.00	(\$3.08)	
																	Refund	\$25.88
THORESON, MARK ALLEN	THORESON, MARK ALLEN		5890 BIRCHFIELD LN NW	CONCORD, NC 28027	Proration	0055729591	HDK9798	PENDING	207516000	Refund Generated due to proration on Bill #0055729591-2020-2020-0000-00	Vehicle Sold	01/12/2021	C ADVL	Tax	(\$20.22)	\$0.00	(\$20.22)	
													CI02ADVL	Tax	(\$13.12)	\$0.00	(\$13.12)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$33.34
THORESON, MARK ALLEN	THORESON, MARK ALLEN		5890 BIRCHFIELD LN NW	CONCORD, NC 28027	Proration	0058446198	KH1886	PENDING	207516018	Refund Generated due to proration on Bill #0058446198-2020-2020-0000-00	Vehicle Sold	01/12/2021	C ADVL	Tax	(\$22.79)	\$0.00	(\$22.79)	
													CI02ADVL	Tax	(\$14.79)	\$0.00	(\$14.79)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$37.58
TROUTMAN, SANDRA CLARE	TROUTMAN, SANDRA CLARE		1907 LANE ST	KANNAPOLIS, NC 28083	Proration	0043684158	EMT7545	PENDING	207204195	Refund Generated due to proration on Bill #0043684158-2019-2019-0000-00	Vehicle Totalled	01/07/2021	C ADVL	Tax	(\$43.47)	\$0.00	(\$43.47)	
													CI04ADVL	Tax	(\$37.01)	\$0.00	(\$37.01)	
													CI04ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$80.48
UTLEY, JACK GREGORY	UTLEY, JACK GREGORY	UTLEY, CHERRY DANIEL	2100 MOUNT PLEASANT RD W	MOUNT PLEASANT, NC 28124	Adjustment < \$100	0058824658	CM65633	PENDING	277952340	Refund Generated due to adjustment on Bill #0058824658-2020-2020-0000-00	Situs error	01/25/2021	C ADVL	Tax	\$0.00	\$0.00	\$0.00	
													CI02ADVL	Tax	(\$24.72)	\$0.00	(\$24.72)	
													CI02ADVL	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)	
													FR16ADVL	Tax	\$6.08	\$0.00	\$6.08	
																	Refund	\$48.64
VINCENT, NOEL ALAN	VINCENT, NOEL ALAN	MCDANIEL, SUZANNE WAGNER	64 HIGHLAND AVE SW	CONCORD, NC 28027	Proration	0047341791	HAC4988	PENDING	208708365	Refund Generated due to proration on Bill #0047341791-2019-2019-0000-00	Vehicle Sold	01/27/2021	C ADVL	Tax	(\$4.66)	\$0.00	(\$4.66)	
													CI02ADVL	Tax	(\$3.02)	\$0.00	(\$3.02)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$7.68
WHITE, GUY	WHITE, GUY	WHITE,	15135	CHARLOTTE,	Proration	0041692817	EMP6088	PENDING	139051426	Refund Generated due to	Reg. Out of	01/26/2021	C ADVL	Tax	(\$63.75)	\$0.00	(\$63.75)	



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 2/1/2021 10:28:21 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason state	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change	
FRANK	FRANK	CHERYL MARTIN	CABARRUS RD	NC 28227						proration on Bill #0041692817-2019-			CI06ADVL	Tax	(\$18.95)	\$0.00	(\$18.95)	
																	Refund	\$82.70
WHITE, WILLIAM JAMES III	WHITE, WILLIAM JAMES III		7793 WINDSOR FOREST PL	HARRISBURG, NC 28075	Proration	0034140535	CLL5652	PENDING	138737388	Refund Generated due to proration on Bill #0034140535-2019-	Vehicle Sold	01/22/2021	C ADVL	Tax	(\$8.40)	\$0.00	(\$8.40)	
													CI01ADVL	Tax	(\$4.03)	\$0.00	(\$4.03)	
																	Refund	\$12.43
WIMBROW, MAXTON LEE	WIMBROW, MAXTON LEE		2015 MONTEROSA RD	CONCORD, NC 28025	Proration	0046303219	FLT5787	PENDING	138412650	Refund Generated due to proration on Bill #0046303219-2019-	Vehicle Sold	01/14/2021	C ADVL	Tax	(\$7.88)	\$0.00	(\$7.88)	
													FR14ADVL	Tax	(\$0.75)	\$0.00	(\$0.75)	
																	Refund	\$8.63
YODER, STACIE LYNN	YODER, STACIE LYNN		1149 FORREST RIDGE DR NW	CONCORD, NC 28027	Proration	0041495672	ZRS3546	PENDING	206873505	Refund Generated due to proration on Bill #0041495672-2019-0000-00	Vehicle Sold	01/04/2021	C ADVL	Tax	(\$6.33)	\$0.00	(\$6.33)	
													CI02ADVL	Tax	(\$4.10)	\$0.00	(\$4.10)	
													CI02ADVL	Vehicle Fee	\$0.00	\$0.00	\$0.00	
																	Refund	\$10.43
																	Refund Total	\$10874.88

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Consent Agenda

**SUBJECT:**

Tax Administration - Waiver of Occupancy Tax Penalty

**BRIEF SUMMARY:**

NCGS 153A-155 provides for the administration of Occupancy Taxes, scheduling those taxes to be due and payable on the 20th day of each month. The statute permits the board to waive past due penalties. Staff have reviewed this waiver request and recommends waiving the penalty.

**REQUESTED ACTION:**

Motion to waive occupancy tax penalty of \$271.26 owed by Econo Lodge – OYO.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Rodney Harris, Deputy County Manager  
David Thrift, Tax Administrator

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a Consent item.

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**ATTACHMENTS:**

▣ Waiver Documentation



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Your SEPTEMBER  
Occupancy Tax Report and  
Payment Were Due  
OCTOBER 20th

Dear Occupancy Tax Remitter (ECONO LODGE- OYO):

The Cabarrus County Finance Department has not received your company's Occupancy Tax Report or payment. In accordance with North Carolina General Statute (NCGS) Section 160A-215(d), a monthly Occupancy Tax Report and tax liability payment is due on or before the 20<sup>th</sup> of each month, following the month of collection. In the event the 20<sup>th</sup> day of the month falls on a weekend, the due date is extended to the Monday following the weekend.

Penalties are assessed, in accordance with NCGS Section 160A-215(e), for the failure to file a timely return and the failure to pay tax on or before the due date.

Please calculate the appropriate amount of penalties on the Occupancy Tax Report, and submit the report and payment immediately. Penalties continue to accrue until the report and payment are received by the Cabarrus County Finance Department.

Mail your Occupancy Tax Report and payment to:

Cabarrus County Finance Department  
PO Box 707  
Concord NC 28026-0707

Telephone: (704) 920-2104

If you have questions about this notice, please contact me directly at (704) 920-2106 or email me at [PSRitch@CabarrusCounty.US](mailto:PSRitch@CabarrusCounty.US).

Kind regards,

Peticia Ritch  
Accounting Specialist

Kanaiyalal Patel  
3100 Cloverleaf Pkwy Kannapolis, NC 28083  
704-786-3100

12/14/20

A formal request for the Cabarrus County Finance Office

I am writing to request that you waive the penalty of \$2985.69 on the account linked to sales tax ID 600527456 (Shree Radha Krishna Inc). For years I have made monthly payments on this account on time, without exception. I know the due date by heart and it is also marked on my calendar.

However, we had a mix up when sending the payment and forgot to actually place the check inside the envelope we sent to you! As you can imagine, I was beside myself because of this careless error and sent a check out right away when I received word from your office about the mistake.

I promptly resumed payments at that time, but it was too late to avoid being assessed the late fee. Please consider reversing the fee in light of these unusual, one-time circumstances. I wish to remain in good standing with your office.

Appreciatively,

*Kanaiyalal M. Patel*  
Kanaiyalal Patel

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

**February 15, 2021  
6:30 PM**

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### **AGENDA CATEGORY:**

New Business

### **SUBJECT:**

Planning and Development - Community Development Programs for 2021-2022 - Public Hearing 6:30 p.m.

### **BRIEF SUMMARY:**

Cabarrus County Community Development staff is requesting the authorization to continue the Weatherization, Heating and Air Repair and Replacement Program, Housing and Home Improvement, the Duke Energy DE WX program and the Blue Cross Blue Shield Healthy Homes Initiative if Blue Cross extends the program into fiscal next year. Staff is requesting that Cabarrus County not accept HOME program money for the 2021-2022 year. Staff just received the contracts for the program year that started July 1 in late December. Cabarrus County will be partnering with the City of Concord to construct new home in the City of Concord. The County will have enough funding to do at least one housing rehabilitation job and will have additional funds when the home sells for more homes to rehabilitated. A public hearing will need to be held to amend the 2020-2021 HOME program plan to allow for at least 1 home to be rehabilitated with the remaining funds after the construction of the new home. As a reminder, the home will only be eligible for purchase by qualified applicants through the City of Concord and that process will be handled by the City of Concord.

### **REQUESTED ACTION:**

Hold a public hearing.

### **EXPECTED LENGTH OF PRESENTATION:**

10 Minutes

### **SUBMITTED BY:**

Kelly Sifford, AICP

Planning and Development Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda as a New Business item.

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**ATTACHMENTS:**

- ▣ Public Hearing Notice - Newspaper
- ▣ Public Hearing Notice - Website

# THE INDEPENDENT TRIBUNE

February 3 & 7, 2021



## NOTICE OF PUBLIC HEARING February 15, 2021- 6:30 p.m.

### 2020-2021 HOME Program Public Hearing Notice

Notice is hereby given that the Cabarrus County Board of Commissioners will hold a public hearing at 6:30 p.m. (or as soon thereafter as persons may be heard) on Monday, February 15, 2021.

The meeting will be conducted remotely, as allowed by the Board's Remote Participation Policy during this state of emergency.

There will not be a meeting place where members of the public can be physically present. The Board of Commissioners' meeting will be broadcast live on Channel 22, <https://www.youtube.com/cabarruscounty> and <https://www.cabarruscounty.us/cabcotv> or if you wish to listen to the meeting, you may call in at 704-920-2023. Your pin will be 1234.

The following three sources will be available for input during the public hearing:

1. Conference call number 704-920-2023 pin 1234
2. Set up a video meeting with [publiccomment@cabarruscounty.us](mailto:publiccomment@cabarruscounty.us) by 5 p.m. on Friday, February 12th.
3. Email comments to [publiccomment@cabarruscounty.us](mailto:publiccomment@cabarruscounty.us) by 5 p.m. on Monday, February 15th to be read at the meeting. Due to NC guidance, written public hearing comments will be accepted for 24 hours after the opening of the public hearing.

Cabarrus County had previously held a public hearing for the 2020-2021 HOME program. In that hearing, it was advertised that the County would partner with the City of Concord to construct a new home for sell to an eligible buyer. The County would like to amend the plan to include one single family rehabilitation in addition to the new home construction.

Any questions concerning this item should be addressed to the Cabarrus County Planning and Development Services Department- Community Development Division at (704) 920-2142 or TDD at 704-920-3000. If reasonable accommodations are needed, please contact the ADA Coordinator at 704-920-2100 at least 48 hours prior to the public hearing.

**Publish: February 3, February 7, 2021.**



CABARRUS COUNTY  
BOARD OF COMMISSIONERS

**NOTICE OF PUBLIC HEARING**  
**February 15, 2021– 6:30 p.m.**

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Lauren Linker, Clerk to the Board

Posted February 3, 2021

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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### **AGENDA CATEGORY:**

New Business

### **SUBJECT:**

LME-MCO Realignment Written Request

### **BRIEF SUMMARY:**

The Cabarrus County Board of Commissioners voted unanimously on October 19, 2020 to begin the process to disengage from Cardinal Innovations Healthcare and realign with Partners Health Management, consistent with applicable statutes and regulations under NCGS §122C-155 (a3) and 10ANCAC26C.0701 – 0703. As part of the realignment process, the Board of Commissioners is requested to adopt a Resolution to direct and empower the County Manager and others to complete all necessary steps to effect the change in accordance with guiding statute and rules in the most expeditious manner possible, including the approval of the final Disengagement Plan, Continuity of Services Plan, Distribution of Real Property Plan, and the Disengagement Financial Liabilities Plan attached to this resolution.

### **REQUESTED ACTION:**

Motion to adopt the resolution to direct and empower the County Manager and others to complete all necessary steps to effect the change in accordance with guiding statute and rules in the most expeditious manner possible, including the approval of the final Disengagement Plan, Continuity of Services Plan, Distribution of Real Property Plan, and the Disengagement Financial Liabilities Plan attached to this resolution.

### **EXPECTED LENGTH OF PRESENTATION:**

10 Minutes

### **SUBMITTED BY:**

Mike Downs, County Manager

Karen Calhoun, DHS Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

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**ATTACHMENTS:**

- ▣ LME MCO Cabarrus County Resolution
- ▣ Cabarrus County LME-MCO Disengagement Plan
- ▣ Cabarrus County LME-MCO Continuity of Services Plan
- ▣ Cabarrus County LME-MCO Distribution of Real Property Plan
- ▣ Cabarrus County LME-MCO Financial Liabilities Plan



## Resolution

**WHEREAS**, North Carolina General Statute §122C-115 (a3) empowers a county to choose its Local Management Entity/Managed Care Organization (LME/MCO) subject to the approval of the Secretary of the North Carolina Department of Health and Human Services; and

**WHEREAS**, this Board approved a resolution on October 19, 2020 to seek to disengage from Cardinal Innovations Healthcare and to join Partners Health Management, and authorized, directed and empowered the County Manager, County Attorney and others to begin that process; and

**WHEREAS**, the Board has received and reviewed the posted Disengagement Plan and all comments thereto and provided further public comments in Board meetings over the past four (4) months; and

**WHEREAS**, the Board has received and reviewed a Continuity of Services Plan recommended by a transition committee made up of key stakeholders headed by the County Manager; and

**WHEREAS**, the Board has also received and reviewed a recommended Distribution of Real Property Plan reflecting known realty needed to be distributed for this LME/MCO disengagement and realignment; and

**WHEREAS**, the Board agrees with these three legally required plans as written and attached to this resolution; and

**WHEREAS**, as delegated by the County Manager, the Partners Health Management's Board of Directors has been requested to formally consider and approve the County's request to realign. It is our understanding they are ready to address approval of this realignment and are scheduled to do so on February 10, 2021;

**NOW, THEREFORE, BE IT RESOLVED** by the Board of Commissioners of the County of Cabarrus as follows:

1. Cabarrus County approves disengagement from Cardinal Innovations Healthcare and to join Partners Health Management, effective July 1, 2021, or on such other date mutually agreed upon with the State and Partners.
2. Cabarrus County approves the Disengagement Plan attached to this resolution.
3. Cabarrus County approves the Continuity of Services Plan attached to this resolution.
4. Cabarrus County approves the Distribution of Real Property Plan attached to this resolution.

5. Cabarrus County approves the disengagement financial liabilities report, of which there are none, attached to this resolution.
6. Cabarrus County formally requests Partners' Board of Directors to approve this realignment.
7. The Board of Commissioners directs and empowers the County Manager and others to complete all necessary steps to effect the change in accordance with guiding statute and rules in the most expeditious manner possible.
8. The Board of Commissioners hereby authorizes the County Manager to work with the County Attorney and staff to prepare and issue an appropriate documentation, request to State, effect publications, and such other actions necessary to affect this resolution and this LME/MCO disengagement and realignment.

Adopted this 15<sup>th</sup> day of February, 2021.

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Stephen M. Morris, Chairman  
Cabarrus County Board of Commissioners

ATTEST:

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Clerk, Board of Commissioners



## **CABARRUS COUNTY LME/MCO DISENGAGEMENT PLAN**

### **I. PURPOSE**

Cabarrus County is dedicated to improving the quality of life of the residents who have chosen our county as their home. It is in consideration of this strategic goal that your Cabarrus County Board of County Commissioners chose to pursue a relationship with Partners Behavioral Health Management to manage our citizens' behavioral health services funded by federal, state and county dollars, including Medicaid. Partners is a Local Management Entity/Managed Care Organization (LME/MCO), which is a governmental entity that manages the county's mental health, intellectual/developmental disability and substance use services. Currently, our behavioral health services are managed by Cardinal Innovations Healthcare. However, Partners' intentional focus on community interaction and high-engagement with stakeholders, among other attributes, more closely aligns with Cabarrus County's vision and strategic planning. Cabarrus County believes this realignment will better serve the community and its needs.

To prevent disruption of the behavioral health system in our county, this "Cabarrus County LME/MCO Disengagement Plan" has been developed to ensure a smooth and seamless transition for all those involved.

Our primary focus is to carry out this process with transparency, commitment to our community, and the involvement of those who will be impacted by the change. This plan primarily outlines the process for the County's disengagement from Cardinal. However, it necessarily also refers to the process by which engagement will occur between Cabarrus County, Partners, and all relevant stakeholders. Partners has committed to working collaboratively with Cabarrus County and Cardinal to ensure a smooth transition for all involved. Cabarrus County has every confidence and expectation that Cardinal will also work collaboratively and cooperatively throughout the transition process.

### **II. BACKGROUND**

North Carolina law permits a county to choose its LME/MCO. On October 19, 2020, your Cabarrus County Board of County Commissioners voted unanimously to disengage from its current LME/MCO, Cardinal Innovations Healthcare, to realign with Partners Behavioral Health Management. The resolution is attached and is also on our website at [www.cabarruscounty.us](http://www.cabarruscounty.us), where other information on this process (including this Disengagement Plan) is or will be posted.

### **III. RATIONALE**

Cabarrus County is committed to ensuring the best behavioral health system is available to citizens in the community. We believe that transitioning to the model of service management and community engagement operated by Partners will best accomplish that goal. As we have engaged in analysis and review of the Partners model of operations, we have concluded that it is one of intentional community integration at multiple levels within the counties that they serve. Leadership and staff throughout Partners are engaged in relationships within their communities, actively collaborating with stakeholders, providers, consumers and others to meet the challenges faced.

Cabarrus County also supports the Partners way of managing local maintenance of effort contributions. Partners works in collaboration with county government officials and local stakeholders to develop plans to invest those taxpayer-provided funds on mutually developed projects which will have the highest level of benefit to the citizens. They provide a transparent accounting of uses of those funds to county leadership and respond to wishes of the county to target the funding to desired projects.

Cabarrus County further appreciates the Partners approach of inclusion in the provider network development. Cabarrus County has always desired more local services and a choice for county residents and Partners philosophy of not tightly limiting the network allows greater levels of service on both accounts. Cabarrus County also agrees with Partners model of community priorities. As they have focused attention on overarching challenges faced by most all communities around the state, their implementation model is locally driven. Philosophically that style of execution aligns well with the views of Cabarrus County leadership as we see healthcare best solved at the local level and not attempted as a cookie cutter, one size fits all model of delivery. From a commuting pattern and “citizen flow” perspective, Cabarrus County aligns well with Iredell, Stanly and Union Counties and shares much in the way of normal flow of local residents. There is a greater sense of connection to Iredell, Stanly and Union Counties for most local citizens than traveling to Charlotte for goods and services, including healthcare.

Partners has routinely demonstrated a high level of consumer engagement when compared to peer programs in the state. As the state reports on numbers of individuals who access care compared to the population as a whole, Partners consistently is at or near the top, indicating good accessibility of services to residents in the counties served.

Partners is also one of the highest performing programs as evaluated by the state contract external review organization. For the past two years, Partners has been at or near the top in the total score rating the performance by the independent, external review organization which indicates a commitment to excellence that aligns with county goals.

### **IV. TIMELINE**

Disengagement will be effective as soon as permitted by law and reasonable. While the default effective date of nine-months, Cabarrus County may seek to disengage and realign sooner to

minimize any negative impact on Cabarrus County consumers from a slow transition. The official disengagement date will ultimately be determined by the Secretary of North Carolina's Department of Health and Human Services (NCDHHS). To protect our residents in greatest need, disengagement with Cardinal will occur simultaneously with realignment or "engagement" with Partners. The process will include a minimum of 60 days for the public to review and comment on this Disengagement Plan. Following the comment period and the 30 days of posting such comments, Cabarrus County intends to have ready for submission the Request to Disengage documentation and will look for approval within the 90 days outlined in rule. Further, the county intends to seek a shortening of the overall 9-month requirement outlined in rule for the transition to become effective, as we believe a sooner transition while done plan fully and with engagement from the community, will best serve the county residents and minimize the delay in preventing improved services and systems from reaching their full potential.

## **V. DISENGAGEMENT**

This Disengagement Plan serves as a guide for the first step in the process of transitioning from one LME/MCO to the other. While this plan should not be considered all-inclusive, we have made every effort to identify the areas on which we need to focus and the necessary steps to ensuring that the needs of our residents are met. Both Cabarrus County and Partners are dedicated to carrying out this plan, as outlined in the following focus areas:

### **a. Transition Planning**

To ensure active and robust community involvement in this transition and to facilitate input and feedback from subject matter experts, the Cabarrus County Manager will form an LME/MCO Realignment Committee consisting of key County officials and agencies, Partners, and other appropriate stakeholders. This will include the following, or their representatives, plus others as appointed by the County Manager:

- i. County Manager (Chair)
- ii. County DHS Director
- iii. County Public Health Director
- iv. Community Health Council Director
- v. United Way Director
- vi. Local MH Provider Director
- vii. District Attorney
- viii. Sheriff
- ix. County Finance Director
- x. Cabarrus Regional Health System Representative
- xi. One or more Partners executives and directors

This Committee will meet as needed to share information; to schedule listening and education meetings with key stakeholders (providers, consumers, advocates); to consult subject matter experts; and to assist the County and Partners in whatever tasks are needed to ensure a smooth disengagement and transition.

The County and Partners envision the transition plan to include "5 Ps": People, Providers, Projects, Property and Payments. As county leadership and Partners leadership work alongside

those on the LME/MCO Realignment committee, the engagement plan that emerges will be discussed during ongoing meetings with the community and ensure that those “5 P’s” provide for a smooth transition for consumers, providers and community stakeholders. Though such plan is not a required element of the disengagement plan that goes to the Secretary for approval as noted above and is not a document that other counties that have transitioned have published widely, Cabarrus County and Partners share a commitment to transparency and intend to be very inclusive in the development and implementation of this plan.

**b. Continuity of Services Plan**

Cabarrus County recognizes the importance of ensuring services for its community are uninterrupted and are provided with high quality, timeliness and a focus on community involvement. Therefore, a separate written Continuity of Services Plan is being developed and published shortly after this Disengagement Plan. Partners has committed to ensure all current providers contracted and in good standing with Cardinal and serving our County will be contracted with Partners as well, if not already. Likewise, Partners intends to honor consumer service authorizations, annual plans and other documentation and decisions essential to ensure a smooth transition.

**c. Notification of Stakeholders**

Cabarrus County and Partners will collaborate to notify all stakeholders impacted by this transition. Additionally, a concentrated effort will be made to solicit comments, feedback and suggestions from consumers, advocates, self-advocates, providers, State and Local Consumer and Family Advisory Committees (CFACs), and all other interested parties. We will use our usual Cabarrus County established communication methods, primarily our website, plus likely more, such as mailings, stakeholder meetings, press releases, and social media messaging. All input is welcome and encouraged.

**d. Community Initiatives**

Cabarrus County has ensured that Partners is committed to becoming ingrained in our community and supporting our current community initiatives involving behavioral health, as it has in its other counties. A list of all current, planned and proposed projects/initiatives will be compiled and agreed upon prior to the transition effective date.

**e. Distribution of Real Property Plan**

In accordance with State law, a written Distribution of Real Property Plan must be developed during a LME/MCO realignment process. This disengagement involves no real property (land, buildings, etc.) to be distributed, so a Plan stating as much will be posted with or shortly after this Disengagement Plan.

**f. Financial Liabilities**

Cabarrus County affirms that, to its knowledge, it has no outstanding financial liabilities to Cardinal, nor will the County have any within 30 calendar days of the request to disengage. Should Cardinal reasonably disagree, the County will work amicably and promptly with Cardinal to resolve equitably and if unable to do so, defer the matter to the NCDHHS Secretary for resolution. Partners has agreed to work with the County to ensure its financial liabilities under maintenance of efforts requirements are not increased by realigning with Partners.

## **VI. NEXT STEPS/PUBLIC COMMENT**

The law requires Cabarrus County to seek public comment on this Disengagement Plan. For 60 days from the posting of this Disengagement Plan on our website at [www.cabarruscounty.us/mentalhealth.realign](http://www.cabarruscounty.us/mentalhealth.realign), public comment is welcome and encouraged by email to [mentalhealth.realign@cabarruscounty.us](mailto:mentalhealth.realign@cabarruscounty.us) or by mail addressed to:

Cabarrus County Manager  
ATTN: LME/MCO Realignment  
65 Church St. South  
Concord NC 28025

Following this public comment period, the County will post all responses for an additional 30 days. Cabarrus County will take into consideration feedback received, will review all written plans, and submit a written request to disengage to the Secretary of NCDHHS for approval (details of which are outlined in the NC Administrative Code referenced below).

In keeping with our dedication to transparency, both Cabarrus County and Partners commit to keeping the public informed during this process, including public meetings, information and listening sessions with key stakeholders and groups, and more.

## **VII. AUTHORITY**

This Disengagement Plan has been developed in accordance with current state laws and regulations governing a county's disengagement with an LME/MCO. Specifically, the following were used to create the plan and ensure compliance:

- North Carolina General Statute 122C-115 (a3)
- North Carolina Administrative Code 10A NCAC26C.0701-.0703



## **CABARRUS COUNTY LME-MCO CONTINUITY OF SERVICES PLAN**

### **I. PURPOSE**

Cabarrus County recognizes the importance of ensuring that behavioral health services for its community are uninterrupted and provided with high quality, timeliness and a focus on community involvement. Partners Health Management has committed to ensure all current providers contracted and in good standing with Cardinal Innovations Healthcare and serving our County will be contracted with Partners as well, if not already. Likewise, Partners intends to honor consumer service authorizations, annual plans and other documentation and decisions essential to ensure a smooth transition.

### **II. SCOPE**

Throughout the due diligence process including the public comment period, the County has been focused on listening to those who are served by the system to ensure their comments are considered in the development of the required Continuity of Services Plan. The plan outlines and frames how services will be managed when transitioning from Cardinal Innovations to Partners. It is recognized that the process must allow flexibility to respond to changes in the process as the collaborative work moves forward. In addition, the County has factored in the transition of Medicaid to a managed care system using standard and tailored plans. This important aspect is part of our transition planning and is included in our timeline of disengagement and realignment to ensure no adverse impact or disruption in services will occur during our realignment with Partners.

### **III. SERVICE ARRAY**

Partners and Cardinal are both Local Management Entities-Managed Care Organizations (LME-MCOs). All seven (7) LME-MCOs in the state must offer a basic array of services that are substantially comparable, even if named or branded differently but are not identical. For example, Partners has some “in lieu of” services and federal grants that allow for special services and programs. Cardinal has special services as well. Partners will work with Cabarrus County to ensure a full complement of services are available to meet the needs of citizens in the County.

Through the due diligence process, we learned of a few different services between the two LME-MCO’s. Where Cardinal offers a service that Partners does not, we will work with Partners to add that service, if all agree it is appropriate to do so. If not, we will ensure Partners’ service array has like or comparable services to meet the needs of Cabarrus County citizens. In instances where Partners has services and programs that Cardinal does not offer to Cabarrus residents, we will explore with Partners and the consumers, providers and stakeholders in the community the practicality of adding those services to the community array.

#### IV. SERVICE AUTHORIZATIONS

The County has received assurance from Partners that they will honor and bring forward all open services authorizations for Cabarrus County citizens from Cardinal. The County will look to Cardinal to provide that information in a timely and suitable format to ease that transition and to ensure no delays in services to existing recipients of care. Cabarrus County needs the assurance of DHHS that they will assist, as needed, in ensuring that exchange of information.

#### V. PROVIDER NETWORK

Through the process of due diligence, the County learned that there is some overlap or crosswalk in the provider networks between Cardinal and Partners. Yet, there are some differences as well. As we do not have the volume numbers of Cabarrus County clients served by Cardinal providers, it is unknown if those that are not shared serve a high volume of citizens or not. Regardless, Partners has agreed to bring into their network to continue to serve the County any provider who is in good standing with the N.C. Division of Health Benefits and meets all the minimum state imposed rules and requirements. Further, there will be an expedited credentialing process to assist providers not currently contracted with Partners to enter the Partners network in the least intrusive way possible while still meeting the State and other minimum requirements. Lastly, there are providers in the Partners network who currently do not serve consumers in Cabarrus County who have expressed an interest and desire to do so. The Realignment Committee will provide guidance on this subject in their work during the transitional phase to help facilitate additional providers opening access within the County to further provide choice and service capacity. As the County continues to move forward, the work of the Realignment Committee does as well. The Committee, composed of a cross section of community leaders overseen by the County Manager, continues to develop the broader transition plan focused on the impact on “people”, “providers” and “projects”. As part of that work, the Committee will have direct community leadership expectations to ensure the Continuity of Services Plan is executed in such a way that minimizes the disruption to current consumers and providers. The group will also be responsible for coordinating communication sessions with key audiences (consumers, providers, and stakeholders) to ensure the period from Secretarial approval to implementation is filled with many and varied exchanges of information with all groups.

#### VI. REALIGNMENT COMMITTEE

A Realignment Committee has been established and is conducting meetings to create a means for active and robust community and stakeholder engagement in assisting the County in its transition planning and monitoring efforts for the LME-MCO realignment; to facilitate input and feedback from subject matter experts; and to assist in this transition and helping ensure it is as seamless as possible. The Committee membership includes the following members:

- County Manager
- County Commissioner
- Health Director
- United Way Director
- Sheriff
- Hospital CEO or designee
- MH/SU provider serving Cabarrus County
- DHS Director
- Community Health Board Member
- District Attorney
- County Finance Director
- Partners Representatives
- IDD Provider serving Cabarrus

Additional members from Cardinal and the local Consumers and Family Advisory Committee (CFAC) to be added once authorized to realign to continue to develop our Continuity of Services plan and our County LME-MCO Joint Transition plan.



**CABARRUS COUNTY  
DISENGAGEMENT PLAN FROM CARDINAL INNOVATIONS HEALTHCARE SOLUTIONS  
PLAN FOR DISTRIBUTION FOR REAL PROPERTY**

In accordance with State law, a written Distribution of Real Property Plan must be developed during a LME-MCO realignment process. This disengagement involves real property (land, buildings, etc.) to be distributed and the parties will resolve realty distribution, if any, upon approval to disengage.

Cabarrus County and Cardinal Innovations Healthcare Solutions own no real property together and have no direct interests in the other's real property. Cardinal owns five (5) pieces of real estate in Cabarrus County under the name PBH, of which one is a Class A office building that they formerly used as their headquarters before they moved that to Charlotte. This Class A office building has a tax value of \$16,617,710, with no liens against it. It is located on Milestone Drive. The other four (4) pieces appear to be undeveloped commercial lots between the Class A building and Kannapolis Parkway, as if in a campus arrangement. Each of those lots has a tax value of at least \$312,000, with no liens.

Other than its monthly allotments to Cardinal, Cabarrus County has made no payments to Cardinal with reference to any real estate. The Class A building is apparently being used on a reduced basis by Cardinal. Representatives of Cardinal have spoken with Cabarrus County management about a sale of that building to the County, but the County has no pressing need for the building. It might be interested in purchasing it and the four (4) lots for the right price. Although the County does not have a direct recorded lien on Cardinal's real estate in Cabarrus County, the fact that the property approaches \$20 million in value, with no deeds of trust or evidence of financing against it, would indicate that Cardinal used funds from each of the counties in their catchment area to pay for this real estate, including the funds Cardinal received from Cabarrus County. The County would claim an equitable lien on this real property to the extent its funds were used to purchase and improve the property, which lien amount can be determined after disengagement. However, the property owned by Cardinal within Cabarrus County has no impact on realignment efforts.



## **CABARRUS COUNTY**

### **FINANCIAL LIABILITIES PLAN**

Cabarrus County affirms that, to its knowledge, it has no outstanding financial liabilities to Cardinal Innovations Healthcare, nor will the County have any within 30 calendar days of the request to disengage. Should Cardinal reasonably disagree, the County will work amicably and promptly with Cardinal to resolve equitably and if unable to do so, defer the matter to the NCDHHS Secretary for resolution. Partners Health Management has agreed to work with the County to ensure its financial liabilities under maintenance of efforts requirements are not increased by realigning with Partners.

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

New Business

**SUBJECT:**

Planning and Development - Weatherization Cares Contract and Associated Budget Amendment

**BRIEF SUMMARY:**

Cabarrus County received an additional \$19,500 in Heating and Air Repair and Replacement funding and \$3,559 in Low Income Home Energy Assistance Program for at total of \$23,059 through the state Weatherization Program. The additional LIHEAP funds are to be used for COVID expenses and the HARRP funds for additional units. The contract and associated budget amendment are attached.

**REQUESTED ACTION:**

Motion to accept grant award and adopt the associated budget amendment.

**EXPECTED LENGTH OF PRESENTATION:**

5 Minutes

**SUBMITTED BY:**

Kelly Sifford, AICP  
Planning and Development Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

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**ATTACHMENTS:**

- ▣ Contract
- ▣ Budget Amendment



NORTH CAROLINA  
*Environmental Quality*

ROY COOPER  
*Governor*

MICHAEL S. REGAN  
*Secretary*

SUSHMA MASEMORE  
*Director*

February 10, 2021

Ms. Kelly Sifford  
Planning and Development Director  
Cabarrus County Planning and Development Services Department  
Post Office Box 707  
Concord, North Carolina 28026

Dear Ms. Sifford:

Attached is your agency's fiscal year 2021-2022 CARES LIHEAP Weatherization Assistance Program and Heating and Air Repair and Replacement Program Contract for the period September 1, 2020 through September 30, 2021.

After carefully reviewing the Contract and attachments (replace outdated attachments as needed), please have your authorized representative sign and date in the designated place. Please upload the signed copy to your FY21 ShareFile Application/Amendment/Contract folder as soon as possible, but no later than Thursday, February 18, 2021. Fully executed contracts with DEQ signature and an effective date of September 1, 2020 will be posted to ShareFile as soon as completed.

Please contact my office if you have questions or need additional information.

Sincerely,

*Maye Hickman*  
Program Manager

MH/sk

cc: Mr. Stephen M. Morris, Chairperson  
Board of Directors



**NORTH CAROLINA DEPARTMENT OF ENVIRONMENTAL QUALITY  
CARES ACT FINANCIAL ASSISTANCE AGREEMENT DRAFT**

This financial assistance agreement is hereby made and entered into by and between the **NORTH CAROLINA DEPARTMENT OF ENVIRONMENTAL QUALITY** (the "Department") and **Cabarrus County Planning and Development Services Department** (the "Subgrantee"); (DUNS #086861630).

- 1. Purpose of Agreement.** The purpose of this agreement is to provide the Subgrantee with CARES Act funds in response to the COVID-19 public health emergency (the "Subaward Funds") for: (1) Allowable COVID-19 Related Expenses; and (2) a Heating and Air Repair and Replacement Program to provide for the inspection, repair and replacement of heating and air systems for low income residents pursuant to 45 CFR Part 96, Subpart H ("HARRP Services") in accordance with the most recent versions of the *North Carolina Weatherization Assistance Program & Heating and Air Repair and Replacement Program Budget and Program Guidance*, *North Carolina DOE State Plan* and *North Carolina Standard Work Specifications* issued by the Department, as may be amended from time to time, WPN 15-4, and this Grant Award Contract. Each Subgrantee must also comply with the applicable sections of 2 CFR 200. By signing this contract, the Subgrantee acknowledges reading and abiding by the aforementioned documents.
- 2. Contract Documents.** The subaward agreement consists of this document (the "Subaward Contract") and its attachments, which are incorporated herein by reference and identified by name as follows:
  - a. State's General Terms and Conditions (Attachment A)
  - b. Scope of Work (Attachment B)
  - c. Approved Budget (Attachment C)
  - d. Subgrantee's Conflict of Interest Policy (Attachment D)
  - e. Certification of No Overdue Tax Debts (Attachment E)
  - f. Notice of Certain Reporting and Audit Requirements (Attachment F)
  - g. Certification Regarding Lobbying, Debarment, Drug-Free Workplace, Environmental Tobacco Smoke (Attachment G)
  - h. IRS Federal Tax-Exempt Letter or 501 C verification form (if applicable) (Attachment H)

Together, these documents (the "Contract Documents") constitute the entire agreement between the parties and supersede all prior oral or written statements or agreements. Modifications to this Subaward Contract or to any other Contract Document may only be made through written amendments duly executed by authorized representatives of the parties.
- 3. Precedence Among Contract Documents.** In the event of a conflict or inconsistency between or among the Contract Documents, the document with the highest relative precedence prevails. The order of precedence is established by the order of documents in Section 2 above, with the first-listed document having the highest precedence and the last-listed document having the lowest precedence. If there are multiple contract amendments, the most recent amendment has the highest precedence and the oldest amendment has the lowest precedence.
- 4. Subgrantee Proposal.** All representations and commitments made in the Subgrantee Proposal (Attachment D), including all representations regarding sources and amounts of public funding, are incorporated herein by reference and deemed material to this agreement.
- 5. Contract Period.** This agreement shall be effective starting **September 1, 2020** and shall expire on **September 30, 2021** (the "Expiration Date").

- 6. Subgrantee's Duties.** As a condition of the subaward, the Subgrantee agrees to:
- a. Expend COVID-19 Related Expenses and Perform the HARRP Services as described in the Subgrantee Scope of Work (Attachment B) and in accordance with the Approved Budget (Attachment C).
  - b. Ensure that all Subaward Funds are expended in a manner consistent with the goals and objectives of the Federal Grant Awards as herein described.
  - c. Comply with all Federal financial assistance regulations applicable to the Subgrantee as a recipient of USDHHS funding, including, but not limited to:
    - (i) 10 CFR 440, 2 CFR Parts 200 and 910, and 45 CFR Part 75 concerning uniform administrative requirements, cost principles, and audit requirements for awards of financial assistance by USDHHS;
    - (ii) 45 CFR Part 96, Subpart H concerning financial assistance under USDHHS' Low-Income Home Energy Assistance Program;
    - (iii) 2 CFR Parts 376 and 901 ("Non-procurement Debarment and Suspension");
    - (iv) 2 CFR Parts 382 and 902 ("Requirements for Drug-Free Workplace (Financial Assistance)"); and
    - (v) 10 CFR Part 601 and 45 CFR Part 93 ("New Restrictions on Lobbying").
  - d. Comply with the requirements of 09 NCAC 03M .0101, et seq. ("Uniform Administration of State Awards of Financial Assistance"), including, but not limited to, those provisions relating to audit oversight, access to records, and availability of audit work papers in the possession of any auditor of any recipient of State or Federal funding.
  - e. Comply with the applicable provisions of Attachment B, Notice of Certain Reporting and Audit Requirements.
  - f. Maintain all records related to this Subaward Contract (i) for a period of six (6) years, (ii) for the period of time required by the Federal Grant Awards, or (iii) until all audit exceptions have been resolved, whichever is longest.
  - g. Comply with all other laws, ordinances, codes, rules, regulations, and licensing requirements applicable to its performance under this agreement and/or the conduct of its business generally, including those of Federal, State, and local agencies having jurisdiction and/or authority.
- 7. Department's Duties.** The Department shall pay the Subgrantee in the manner and in the amounts specified in this Subaward Contract and in accordance with the Approved Budget set forth in Attachment C.
- 8. Contract Amount.** The total amount paid by the Department to the Subgrantee under this agreement shall not exceed **\$23,059** (the "Total Contract Amount"). Program-specific payment totals shall not exceed the dollar figures set out in Approved Budget (see Attachment C). See Federal Award Identifications below:

<b>FEDERAL AWARD IDENTIFICATIONS:</b>	
Federal Award Identification Number (FAIN)	2001NCE5C3
Federal Award Date	9/1/2020-9/30/2021
Subaward Period of Performance Start/End Date	9/1/2020-9/30/2021
CFDA Number and Name	93.568 Low Income Home Energy Assistance
LIHEAP Federal Award Indirect Cost Rate	NIA
Total FY21 LIHEAP Funds to DEQ	\$4,000,000
Total Amount Federal Award	\$25,455,858
Contract is R&D	No
DEQ Duns Number	809785280

**9. Budget and Budget Modification.** The Subgrantee's expenditures shall not exceed the line-item amounts set forth in the Approved Budget (Attachment C) without prior written consent from a duly authorized representative of the Department. Requests by the Subgrantee to modify or amend the Approved Budget shall be submitted to the Department in writing.

**10. Payment Provisions.** Payments to the Subgrantee shall be made in accordance with the following provisions:

- a. Requests for payment shall be submitted to the Department in the prescribed format of Form 286. All such requests must be supported with, and accompanied by, documentation showing that expenditures are consistent with the Subgrantee Proposal, the Approved Budget and the provisions of this Subaward Contract.
- b. The completed Form 286 and its accompanying documentation must be submitted monthly according to 286 Calendar Schedule, or as otherwise requested by the Department.
- c. Payments shall be calculated based on allowable costs less funds advanced in excess of cash need, disallowed costs or other setoff items as the Department deems necessary.
- d. Payments to the Subgrantee may be withheld if reporting obligations are not met at the time payment is requested. Moreover, the Department may, in its sole discretion, de-obligate or redistribute any portion of the Subaward Funds if the Subgrantee fails to meet any of its duties or responsibilities under this agreement.
- e. Upon written request by the Department, the Subgrantee shall return any Subaward Funds it receives for costs that are determined to be "disallowed costs" as defined in 2 CFR Part 200.
- f. All costs must be incurred on or before the Expiration Date of this Subaward Contract. The final Form 286 and all other reimbursement requests must be submitted to the Department on or before the forty-fifth (45th) calendar day following such date.
- g. If the Subaward Contract is terminated before the Expiration Date (the "Termination Date"), the Subgrantee shall complete a final reimbursement report and return any unspent funds to the Department no later than thirty (30) calendar days after the Termination Date.
- h. If the amount reimbursed to the Subgrantee exceeds the expenditures reported on the final Form 286, a check made payable to the Department representing the difference between those amounts must accompany the final Form 286.
- i. Payments by the Department that are delayed, withheld or denied shall not be subject to penalty or interest.

**11. Advances.** At the request of the Subgrantee, the Department may, in its sole discretion, provide an operating advance for allowable costs. Any such advance shall be subject to the following provisions:

- a. The Subgrantee shall repay advances, or certain portions of advances, no later than ten (10) business days following a request for such repayment by the Department.
- b. The Subgrantee may repay all or any portion of an outstanding advance at any time.

c. Funds advanced to the Subgrantee under this section shall be exhausted in full or repaid to the Department no later than June 15 of the contract year. Where the advanced funds are not exhausted in full, repayment shall be accomplished by offsetting the amount due back to the Department against reimbursements requested by the Subgrantee, or by some other method suitable to the circumstances as agreed upon by the parties. Notwithstanding any other provision in this section, the Department shall have ultimate discretion with respect to determining the Subgrantee's timing and manner of repayment.

**12. Availability of Funds.** The Subgrantee understands and agrees that payment of the sums specified herein shall be subject to, and contingent upon, the allocation and appropriation of funds to the Department for the purposes set forth in this agreement.

**13. Reversion of Unexpended Funds.** The Subgrantee understands and agrees that any unexpended grant funds shall revert to the Department upon termination or expiration of this Subaward Contract.

**14. Supplantation of Expenditure of Public Funds.** The Subgrantee understands and agrees that funds received pursuant to this Subaward Contract may be used only to supplement, not to supplant, the total amount of Federal, State and local public funds that the Subgrantee otherwise expends for Weatherization and HARRP services.

**15. Contract Administrators.** Each party shall submit notices, questions and correspondence related to this agreement to the other party's Contract Administrator. The contact information for each party's Contract Administrator is set out below. Either party may change its Contract Administrator and/or the associated contact information by giving timely written notice to the other party.

<b>Subgrantee Contract Administrator:</b>	<b>Department's Contract Administrator</b>
Name and Title Ms. Kelly Sifford, Planning and Development Director Cabarrus County Planning and Development Services Department Post Office Box 707 Concord, North Carolina 28026  Telephone: (704) 920-2141	Name and Title Maye Hickman, Program Manager North Carolina Department of Environmental Quality  Weatherization Assistance Program 4345 Mail Service Center Raleigh, North Carolina 27699-4345  Telephone: (919) 594-4859

**16. Subgrantee's Key Personnel.** The Subgrantee shall not substitute its key personnel ("Key Personnel") assigned to the performance of this agreement without prior written approval from the Department's Contract Administrator. The Subgrantee has assigned its Key Personnel as follows:

<b>Name (included in attachments)</b>	<b>Position</b>	<b>Email</b>

**17. Historic Preservation.** Throughout the course of its performance hereunder, the Subgrantee shall comply with applicable requirements of Section 106 of the National Historic Preservation Act, as amended, taking care to avoid any conduct or activity that could adversely impact historic property.

- 18. Procurement.** The Subgrantee understands and agrees that all procurement activities undertaken in connection with this Subaward Contract must conform to the procurement standards set forth in 2 CFR Part 200. Any such procurement activities shall also be subject to the following provisions:
- a. None of the work to be performed under this agreement involving the specialized skill or expertise of the Subgrantee shall be contracted without prior written approval from the Department's Contract Administrator.
  - b. In the event the Subgrantee contracts for any of the work to be performed hereunder, the Subgrantee shall not be relieved of any duties or responsibilities herein set forth.
  - c. The Subgrantee shall not contract with any vendor who is restricted from contracting with the State of North Carolina under N.C. Gen. Stat. §§ 143-133.3, 143-59.1, 143-59.2 or 147-86.60.
- 19. Privacy Protections.** The Subgrantee understands and acknowledges that applicants and recipients of Weatherization and HARRP services will be required to provide the Subgrantee with personal information of a private and sensitive nature, such as name, address, age, income and disability status ("Personal Information"). Accordingly, the Subgrantee agrees to keep and maintain all Personal Information in strict confidence, using such degree of care as is appropriate to avoid unauthorized access, use or disclosure. In particular, the Subgrantee shall restrict access to client data in the AR4CA database to those of its staff having a legitimate need for such access. Upon learning that an employee's legitimate need for access no longer exists (e.g., by reason of dismissal, resignation or a change in the individual's job duties), the Subgrantee shall take immediate action to remove that person's AR4CA capabilities. In addition, the Subgrantee shall maintain a log of all active AR4CA users and keep detailed records of any changes in user access status.
- 20. Title VI and Other Nondiscrimination Requirements.** Throughout the course of its performance hereunder, the Subgrantee agrees to comply with all applicable laws, regulations, executive orders and policies relating to nondiscrimination, including, but not limited to:
- a. Title VI of the Civil Rights Act of 1964, as amended;
  - b. Section 504 of the Rehabilitation Act of 1973, as amended;
  - c. Title IX of the Education Amendments of 1972;
  - d. The Age Discrimination Act of 1975, as amended; and
  - e. Part III of Executive Order No. 11246 (September 24, 1965), as amended, concerning equal employment opportunity in Federally assisted construction activities.
- In accordance with the above laws and their implementing regulations, the Subgrantee agrees to assure that no person in the United States shall, on the ground of race, color, national origin, sex, age, or disability, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Subgrantee receives Federal assistance.
- 21. E-Verify.** To the extent applicable, the Subgrantee represents that it and each of its contractors and subcontractors performing work pursuant to, or in association with, this Subaward Contract are in compliance with Article 2 of Chapter 64 of the North Carolina General Statutes, including, in particular, the requirement that certain employers verify the work authorization of newly hired employees using the Federal E-Verify system.
- 22. Survival.** Any provision contained in this or any other Contract Document that contemplates performance or observance subsequent to the termination or expiration of this agreement shall survive the termination or expiration thereof and continue in full force and effect.
- 23. Signature Warranty.** The undersigned represent and warrant that they are authorized to bind their principals to the terms of this Subaward Contract, which includes all terms incorporated by reference to other documents and/or applicable law.

IN WITNESS WHEREOF, the Subgrantee and the Department execute this Subaward Contract in two (2) originals, one (1) of which is retained by the Subgrantee and one (1) of which is retained by the Department, the day and year first above written.

**SUBGRANTEE**

**NORTH CAROLINA DEPARTMENT OF ENVIRONMENTAL QUALITY**

By \_\_\_\_\_  
Subgrantee's Signature

By \_\_\_\_\_  
Signature of Department Head or Authorized Agent

\_\_\_\_\_  
Printed Name and Title

Tommy Kirby, Purchasing Director \_\_\_\_\_  
Printed Name and Title

\_\_\_\_\_  
Organization

Financial Services Division, Purchasing and Contracts Section  
\_\_\_\_\_  
Division/Section

**ORIGINAL**

## ATTACHMENT A

### General Terms and Conditions

#### Definitions

Unless indicated otherwise from the context, or as specifically defined in the Grant Agreement (including its Attachments), the following capitalized terms have the meanings ascribed to them below.

**Application** means any application submitted by the Subgrantee to the Department for funding for Weatherization Services and HARRP Services.

**Award** means the grant of funds made by the Department to the Subgrantee for Weatherization Services and HARRP Services, the terms of which are governed by this Grant Agreement.

**Eligible Costs** are those for which Award disbursements may be made pursuant to 10 CFR Part 440 and 45 CFR Part 96, Subpart H, and the applicable cost principles of OMB Circulars A-87, A-21, and A-121.

**State** means the State of North Carolina.

**State Actor** means any employee, contractor, or agent of the Office of State Budget and Management, the State Auditor, and other State auditors, and the Department.

#### Relationships of the Parties

**Independent Contractor:** The Subgrantee is and shall be deemed to be an independent contractor in the performance of this Grant Agreement and as such shall be wholly responsible for the work to be performed and for the supervision of its employees. The Subgrantee represents that it has, or shall secure at its own expense, all personnel required in performing the services under this agreement. Such employees shall not be employees of, or have any individual contractual relationship with, the Department.

**Assignment:** No assignment of the Subgrantee's obligations or the Subgrantee's right to receive payment hereunder shall be permitted. However, upon written request approved by the issuing purchasing authority, the State may:

- (a) Forward the Subgrantee's payment check(s) directly to any person or entity designated by the Subgrantee, or
- (b) Include any person or entity designated by Subgrantee as a joint payee on the Subgrantee's payment check(s).

In no event shall such approval and action obligate the State to anyone other than the Subgrantee and the Subgrantee shall remain responsible for fulfillment of all Grant Agreement obligations.

**Beneficiaries:** Except as herein specifically provided otherwise, this Grant Agreement shall inure to the benefit of and be binding upon the parties hereto and their respective successors. It is expressly understood and agreed that the enforcement of the terms and conditions of this Grant Agreement, and all rights of action relating to such enforcement, shall be strictly reserved to the Department and the named Subgrantee. Nothing contained in this document shall give or allow any claim or right of action whatsoever by any other third person. It is the express intention of the Department and Subgrantee that any such person or entity, other than the Department or the Subgrantee, receiving services or benefits under this Grant Agreement shall be deemed an incidental beneficiary only.

#### Indemnity and Insurance

**Indemnification:** The Subgrantee agrees to indemnify and hold harmless the Department, the State of North Carolina, and any of their officers, agents and employees, from any claims of third parties arising out of any act or omission of the Subgrantee in connection with the performance of this Grant Agreement. The State shall not provide such indemnification to the Subgrantee.

- (a) **Insurance:** During the term of the Grant Agreement, the Subgrantee shall provide, at its sole cost and expense, commercial insurance of such types and with such terms and limits as may be reasonably associated with the Grant Agreement. At a minimum, the Subgrantee shall provide and maintain the following coverage and limits:
  - (1) **Worker's Compensation Insurance:** The Subgrantee shall provide and maintain worker's compensation insurance, as required by the laws of the states in which its employees work, covering all of the Subgrantee's employees who are engaged in any work under the Grant Agreement.
  - (2) **Employer's Liability Insurance:** The Subgrantee shall provide employer's liability insurance, with minimum limits of \$500,000.00, covering all of the Subgrantee's employees who are engaged in any work under the Grant Agreement.
  - (3) **Commercial General Liability Insurance:** The Subgrantee shall provide commercial general liability insurance on a comprehensive broad form on an occurrence

basis with a minimum combined single limit of \$1,000,000.00 for each occurrence.

(4) **Pollution Occurrence Insurance** – Liability insurance to protect against incidental disturbances of environmental pollutants like lead-based paint dust. The policy must provide three basic limits - \$500,000 per occurrence; \$500,000 aggregate for the policy term; and \$2,500 deductible per occurrence.

(5) **Automobile Liability Insurance:** The Subgrantee shall provide automobile liability insurance with a combined single limit of \$500,000.00 for bodily injury and property damage; a limit of \$500,000.00 for uninsured/under insured motorist coverage; and a limit of \$2,000.00 for medical payment coverage. The Subgrantee shall provide this insurance for all automobiles that are:

(A) owned by the Subgrantee and used in the performance of this Grant Agreement;

(B) hired by the Subgrantee and used in the performance of this Grant Agreement; and

(C) owned by Subgrantee’s employees and used in performance of this Grant Agreement (“non-owned vehicle insurance”). Non-owned vehicle insurance protects employers when employees use their personal vehicles for work purposes. Non-owned vehicle insurance supplements, but does not replace, the car-owner’s liability insurance.

The Subgrantee is not required to provide and maintain automobile liability insurance on any vehicle – owned, hired, or non-owned -- unless the vehicle is used in the performance of this Grant Agreement.

(b) The insurance coverage minimums specified in subparagraph (a) are exclusive of defense costs.

(c) The Subgrantee understands and agrees that the insurance coverage minimums specified in subparagraph (a) are not limits, or caps, on the Subgrantee’s liability or obligations under this Grant Agreement.

(d) The Subgrantee may obtain a waiver of any one or more of the requirements in subparagraph (a) by demonstrating that it has insurance that provides protection that is equal to or greater than

the coverage and limits specified in subparagraph (a). The Department shall be the sole judge of whether such a waiver should be granted.

(e) The Subgrantee may obtain a waiver of any one or more of the requirements in paragraph (a) by demonstrating that it is self-insured and that its self-insurance provides protection that is equal to or greater than the coverage and limits specified in subparagraph (a). The Department shall be the sole judge of whether such a waiver should be granted.

(f) Providing and maintaining the types and amounts of insurance or self-insurance specified in this paragraph is a material obligation of the Subgrantee and is of the essence of this Grant Agreement.

(g) The Subgrantee shall only obtain insurance from companies that are authorized to provide such coverage and that are authorized by the Commissioner of Insurance to do business in the State of North Carolina. All such insurance shall meet all laws of the State of North Carolina.

(h) The Subgrantee shall comply at all times with all lawful terms and conditions of its insurance policies and all lawful requirements of its insurer.

(i) The Subgrantee shall require its subcontractors to comply with the requirements of this paragraph.

(j) The Subgrantee shall demonstrate its compliance with the requirements of this paragraph by submitting certificates of insurance to the Department before the Subgrantee begins work under this Grant Agreement.

### **Default and Termination**

**Termination Without Cause:** The Department may terminate this Grant Agreement without cause by giving 30 days written notice to the Subgrantee.

**Termination for Cause:** In the event that the Subgrantee breaches any covenants, agreement, or certifications in this Grant Agreement, including the expenditure of Award Funds for any other use than for the purposes set forth in this Grant Agreement or the Program Guidance or in any other unauthorized manner, the Department shall have the right to terminate this Grant Agreement by giving written notice to the Subgrantee and specifying the effective date thereof. In that event, all finished or unfinished deliverable items prepared by the Subgrantee under this Grant Agreement shall, at the option of the Department, become its property and the Subgrantee shall be entitled to receive just and equitable compensation for any satisfactory work completed on such materials, minus any disallowed costs outstanding or currently under

investigation, and payment or compensation previously made. Notwithstanding the foregoing provision, the Subgrantee shall not be relieved of liability to the Department for damages sustained by the Department by virtue of the Subgrantee's breach of this agreement.

**Termination by Mutual Consent:** The Parties may terminate the Grant Agreement by mutual consent with 60 days' notice to the other Party, or as otherwise provided by law.

**Remedies:** All rights and remedies existing under this Grant Agreement shall be cumulative and in addition to those rights allowed and provided by law. The Department may demand repayment from the Subgrantee of any amounts that the Department determines were not expended in accordance with this Agreement. The Department may demand repayment of all Award funds distributed to the Subgrantee which were not utilized in accordance with this Agreement. The Department may at any time proceed to protect and enforce all rights available to the Department by suit in equity, action at law, or by any other appropriate proceedings, all of which rights and remedies shall survive the termination of this Agreement. Department may withhold any payment due the Subgrantee for the purpose of setoff until such time as the exact amount of damages due the Department from such breach can be determined. In case of default by the Subgrantee, without limiting any other remedies for breach available to it, the Department may procure the Grant Agreement services from other sources and hold the Subgrantee responsible for any excess cost occasioned thereby. The filing of a petition for bankruptcy by the Subgrantee shall be an act of default under this Grant Agreement.

**Waiver of Default:** Waiver by the Department of any default or breach in compliance with the terms of this Grant Agreement by the Subgrantee shall not be deemed a waiver of any subsequent default or breach and shall not be construed to be modification of the terms of this Grant Agreement unless stated to be such in writing, signed by an authorized representative of the Department and the Subgrantee and attached to the Grant Agreement.

**Availability of Funds:** The parties to this Grant Agreement agree and understand that the payment of the sums specified in this Grant Agreement is dependent and contingent upon and subject to the appropriation, allocation, and availability of funds for this purpose to the Department.

**Force Majeure:** Neither party shall be deemed to be in default of its obligations hereunder if and so long as it is prevented from performing such obligations by any act of war, hostile foreign action, nuclear explosion, riot, strikes,

civil insurrection, earthquake, hurricane, tornado, or other catastrophic natural event or act of God.

**Survival of Promises:** All promises, requirements, terms, conditions, provisions, representations, guarantees, and warranties contained herein shall survive the Grant Agreement expiration or Termination Date unless specifically provided otherwise herein, or unless superseded by applicable Federal or State statutes of limitation.

### **Intellectual Property Rights**

**Copyrights and Ownership of Deliverables:** All deliverable items produced pursuant to this Grant Agreement are the exclusive property of the Department. The Subgrantee shall not assert a claim of copyright or other property interest in such deliverables.

**Federal Intellectual Property Bankruptcy Protection Act:** The Parties agree that the Department shall be entitled to all rights and benefits of the Federal Intellectual Property Bankruptcy Protection Act, Public Law 100-506, codified at 11 U.S.C. 365 (n) and any amendments thereto.

### **Compliance with Applicable Laws**

**Compliance with Laws:** The Subgrantee shall comply with all laws, ordinances, codes, rules, regulations, and licensing requirements that are applicable to the conduct of its business, including those of Federal, State, and local agencies having jurisdiction and/or authority.

**Equal Employment Opportunity:** The Subgrantee shall comply with all Federal and State laws relating to equal employment opportunity.

**Title VI, Civil Rights Compliance:** In accordance with Federal law and U.S. Department of Agriculture (USDA) and U.S. Department of Commerce policy, the contractor is prohibited from discriminating on the basis of race, color, national origin, sex, age or disability. Under the Food Stamp Act and USDA policy, discrimination is prohibited also on the basis of religion or political beliefs.

**Health Insurance Portability and Accountability Act (HIPAA):** The Subgrantee agrees that, if the Department determines that some or all of the activities within the scope of this Grant Agreement are subject to the Health Insurance Portability and Accountability Act of 1996, P.L. 104-91, as amended ("HIPAA"), or its implementing regulations, it will comply with the HIPAA requirements and will execute such agreements and practices as the Department may require to ensure compliance.

### **Confidentiality**

**Confidentiality and Public Records:** To the extent that any information or documents provided to the

Department by, or on behalf of, the Subgrantee would be regarded as confidential or not subject to disclosure under Federal law or the North Carolina General Statutes (including, without limitation, N.C. Gen. Stat. §§ 132-1 et seq., commonly referred to as the “Public Records Act”), the Subgrantee shall clearly identify and mark it as such and that information will, to the extent allowed by law, be treated as confidential and not subject to disclosure by the Department. The Subgrantee has read and understands North Carolina’s laws regarding the treatment of public records and confidential information. Anything that qualifies as a trade secret under North Carolina law must be designated as “confidential” or “trade secret” at the time of initial disclosure to the Department, or it is considered a public record under State law.

### **Oversight**

**Access to Persons and Records:** All State Actors shall have access to persons and records of the Subgrantee, and the right to inspect, copy, audit, and examine all of the relevant books, records, and other documents relating to the Award and fulfillment of this Grant Agreement for the time period specified for retention in this Grant Agreement. Records shall also include those of other funding programs, should they be considered to potentially provide information relevant to this Grant Agreement. The Subgrantee shall make such records available upon demand of a duly authorized representative of a State Actor. In addition, any representative of the United States Inspector General or of the Comptroller General may examine any of the Subgrantee’s or contractor’s records or records of other firms working on the Project. The foregoing Federal entities and State Actors may also interview any of the Subgrantee’s (and Subgrantee’s and contractor’s or other firm’s) employees or officers working on the Project. Nothing in this section shall be interpreted to limit or restrict in any way any existing authority of an Inspector General or the Comptroller General.

**Record Retention:** Records shall not be destroyed, purged or disposed of without the express written consent of the Department. State basic records retention policy requires all grant records to be retained for a minimum of five years or until all audit exceptions have been resolved, whichever is longer. Under applicable Federal regulations, record retention may be longer than five years since records must be retained for a period of three years following submission of the final Federal Financial Status Report, if applicable, or three years following the submission of a revised final Federal Financial Status Report. Also, if any litigation, claim, negotiation, audit, disallowance action, or other action involving this Contract has been started before expiration of the five-year retention period described above, the records must

be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular five-year period described above, whichever is later.

### **Warranties and Certifications**

**Date and Time Warranty:** The Subgrantee warrants that the product(s) and service(s) furnished pursuant to this Grant Agreement (“product” includes, without limitation, any piece of equipment, hardware, firmware, middleware, custom or commercial software, or internal components, subroutines, and interfaces therein) that perform any date, time or GIS data recognition function, calculation, or sequencing will support a four digit year format and will provide accurate date, time and GIS data and leap year calculations. This warranty shall survive the termination or expiration of this Grant Agreement.

**Certification Regarding Collection of Taxes:** G.S. 143-59.1 bars the Secretary of Administration from entering into contracts with vendors that meet one of the conditions of G.S. 105-164.8(b) and yet refuse to collect use taxes on sales of tangible personal property to purchasers in North Carolina. The conditions include: (a) maintenance of a retail establishment or office; (b) presence of representatives in the State that solicit sales or transact business on behalf of the vendor; and (c) systematic exploitation of the market by media-assisted, media-facilitated, or media-solicited means. The Subgrantee certifies that it and all of its affiliates (if any) collect all required taxes.

### **Miscellaneous**

**Choice of Law:** The validity of this Grant Agreement and any of its terms or provisions, as well as the rights and duties of the parties to this Grant Agreement, are governed by the laws of North Carolina. The Subgrantee, by signing this Grant Agreement, agrees and submits, solely for matters concerning this Contract, to the exclusive jurisdiction of the courts of North Carolina and agrees, solely for such purpose, that the exclusive venue for any legal proceedings shall be Wake County, North Carolina. The place of this Grant Agreement and all transactions and agreements relating to it, and their situs and forum, shall be Wake County, North Carolina, where all matters, whether sounding in contract or tort, relating to the validity, construction, interpretation, and enforcement shall be determined.

**Amendment:** This Grant Agreement may not be amended orally or by performance. Any amendment must be made in written form and executed by duly authorized representatives of the Department and the Subgrantee.

**Severability:** In the event that a court of competent jurisdiction holds that a provision or requirement of this Grant Agreement violates any applicable law, each such provision or requirement shall continue to be enforced to the extent it is not in violation of law or is not otherwise unenforceable and all other provisions and requirements of this Grant Agreement shall remain in full force and effect.

**Headings:** The Section and Paragraph headings in these General Terms and Conditions are not material parts of the agreement and should not be used to construe the meaning thereof.

**Time of the Essence:** Time is of the essence in the performance of this Grant Agreement.

**Key Personnel:** The Subgrantee shall not replace any of the key personnel assigned to the performance of this Grant Agreement without the prior written approval of the Department. The term “key personnel” includes any and all persons identified as such in the Contract Documents and any other persons subsequently identified as key personnel by the written agreement of the parties.

**Care of Property:** The Subgrantee agrees that it shall be responsible for the proper custody and care of any property furnished to it for use in connection with the performance of this Grant Agreement and will reimburse the Department for loss of, or damage to, such property. At the termination of this Grant Agreement, the Subgrantee shall contact the Department for instructions as to the disposition of such property and shall comply with these instructions.

**Travel Expenses:** Reimbursement to the Subgrantee for travel mileage, meals, lodging and other travel expenses incurred in the performance of this Grant Agreement shall not exceed the rates published in the applicable State rules. International travel shall not be reimbursed under this Grant Agreement.

**Advertising:** The Subgrantee shall not use the award of this Grant Agreement as a part of any news release or commercial advertising

**Conflicting Provisions:** To the extent that any provision of this Grant Agreement is determined to be in contradiction of, or in conflict with any Federal or State law or regulation, the Federal or State law or regulation, shall control. All applicable Federal and State laws and regulations are incorporated herein by reference. Otherwise, any conflict between the provisions, requirements, duties or obligations of this Grant Agreement and any other documentation for this Award shall be resolved in favor of this Grant Agreement.

**Sales/Use Tax Refunds:** The Contractor and all subcontractors shall: (a) ask the North Carolina Department of Revenue for a refund of all sales and use

taxes paid by them in the performance of this contract, pursuant to G.S. 105-164.14; and (b) exclude all refundable sales and use taxes from all reportable expenditures before the expenses are entered in their reimbursement reports.

**Entire Agreement:** This Grant Agreement constitutes the entire agreement between the Parties and supersedes all prior oral or written statements or agreements.

## ATTACHMENT B

### SCOPE OF WORK

#### **PROJECT METHODS:**

The subgrantee shall expend CARES Act funds for: (1) Allowable COVID-19 Related Expenses listed in (1.a-f) below or, additional COVID-19 Related Expenses not listed below, upon written consent from State Weatherization Office only; and (2) the Heating and Air Repair and Replacement Program to provide for the inspection, repair, or replacement of heating and air conditioning systems for low-income residents pursuant to 45 CFR Part 96, Subpart H (“HARRP Services”) in accordance with the most recent versions of the *North Carolina Weatherization Assistance Program & Heating and Air Repair and Replacement Program Budget and Program Guidance*, *North Carolina DOE State Plan* and *North Carolina Standard Work Specifications* issued by the Department, as may be amended from time to time, WPN 15-4, and this Grant Award Contract. Each Subgrantee must also comply with the applicable sections of 2 CFR 200.

1. Allowable COVID-Related Weatherization Expenses to enable compliance with the COVID-19 public health emergency:
  - a. Expenses for acquisition of Personal Protection Equipment (PPE) for Weatherization subgrantee office staff, field staff, and clients, including but not limited to: masks, disposable gloves, and hand sanitizer.
  - b. Sanitizing products in connection with the COVID-19 public health emergency.
  - c. Expenses for disinfection of Weatherization Subgrantee offices, vehicles, and public areas.
  - d. Expenses to improve telework capabilities for Weatherization Subgrantee employees.
  - e. Expenses for providing paid sick, paid family, and medical leave to Weatherization Subgrantee employees.
  - f. No Indirect Costs are associated with these CARES Act funds. However, such costs would be eligible Direct Costs of the Weatherization Subgrantee.

The Department may at any time during this Contract Agreement, assume any of the duties if it is determined that they can be performed more efficiently or at a lower cost through a state-wide approach. If the Department absorbs any of the workload that otherwise would be performed by the Subgrantee, the Department may lower the amount of Administrative funds made available to the Subgrantee. Unless notified otherwise, the Subgrantee will perform the following activities:

1. Promote and market the WAP and HARRP Programs to recruit priority populations;
2. Conduct intake/receive applications for services from potentially eligible individuals;
3. Establish prioritized waiting list using the State rating tool;
4. Perform initial inspection/audit and share energy education info;
5. Install heating and/or air conditioning systems;
6. Conduct final inspections;
7. Maintain customer logs and receive client evaluation survey;
8. Maintain files, complete and submit program and financial reports;
9. Provide continuous training for staff and contractors; and
10. Evaluate program effectiveness.
11. Expend COVID-19 related funds at market rates.

#### **PROJECT EVALUATION:**

The above activities will be monitored for compliance as follows:

- The weatherization coordinator will review the heating and/or air conditioning systems home energy audits and work orders.
- The energy auditor will conduct post inspections of all heating and/or air conditioning systems work performed on the homes.
- Monthly, quarterly, semi-annual and end-of-year performance reports will be reviewed by the weatherization coordinator, the executive director, the program analyst and the program manager.
- Annual monitoring of these CARES Act funds will be conducted by the State Weatherization Office.

**Outcome measures** will be evaluated by the following:

1. Comparing before and post energy consumption bills to determine energy savings;
2. Percentage of air infiltration reduced; and
3. Number of heating and/or air conditioning systems installed.
4. COVID-19 related expenditures will be reviewed for program compliance.

**Service quality measures** will be evaluated by the following:

1. Number of client applications received quarterly;
2. Number of defects during the final inspection;
3. Client satisfaction evaluation survey; and
4. Number of defects found during the onsite Assessment.

**Efficiency measures** will be evaluated by following the average cost per heating and/or air systems repaired or replaced. Per program guidelines, the average cost per home excludes costs associated with administration, the single audit, and liability insurance. The average cost per heating and/or air conditioning systems installed shall not exceed \$6,500. COVID-19 related funds will be reviewed to ensure services and materials were purchased per program compliance.

**ATTACHMENT C**  
**LINE ITEM BUDGET AND NARRATIVE**

(See Attached)

IDENTIFICATION

Subgrantee:	<b>Cabarrus County Department of Commerce</b>	Contract Period:	<b>Sept 1, 2020 to Sept 30, 2021</b>	Initial Budget:	<b>X</b>
				Budget Change #	
				Contract Amendment #	

**BUDGET SUMMARY** SUBGRANTEES: DO NOT USE GRAYED-OUT SECTIONS!

(1) CATEGORIES	DOE WAP					LIHEAP HARRP		
	T&TA	Admin	Program Operations	Health & Safety	DOE WAP Sub Totals	Admin	Program Operations	HARRP Sub Totals
Salaries/Wages		0	0		0	0	0	0
Fringe Benefits		0	0		0	0	0	0
Communications		0	0		0	0	0	0
Equipment					0			
Space Cost					0			0
Training					0			
Travel					0			0
Materials					0		14,625	14,625
Contractual					0		4,875	4,875
Other					0			0
Indirect Rate					0			0
<b>TOTALS</b>	0	0	0	0	0	0	19,500	19,500
LIHEAP COVID RELATED EXPENSES					Sub Totals			
Salaries/Wages		0	0		0			
Fringe Benefits		0	0		0			
Communications		0	3,559		3,559			
Equipment					0			
Space Cost					0			
Travel					0			
Materials					0			
Contractual					0			
Other					0			
Indirect Rate	0.000%				0			
<b>TOTALS</b>		0	3,559	0	3,559			

TOTAL CONTRACT UNITS	
DOE WAP	0
LIHEAP WAP	0
LIHEAP HARRP	3

TOTAL CONTRACT AMOUNTS	
DOE WAP	0
LIHEAP WAP	3,559
LIHEAP HARRP	19,500
<b>BUDGET TOTAL</b>	<b>23,059</b>



**BUDGET SUPPORT DATA**

	DOE WAP		LIHEAP WAP		LIHEAP HARRP	
	Admin	Program Operations	Admin	Program Operations	Admin	Program Operations
<b>FRINGE BENEFITS</b>						
FICA						
Workman's Compensation						
Health Insurance						
Retirement/Pension						
Other (specify)						
NC - SUTA						
Life & AD&D Insurance						
Short Term Disability						
<b>TOTAL FRINGE BENEFITS</b>	0	0	0	0	0	0
<b>COMMUNICATIONS</b>						
	DOE WAP		LIHEAP WAP		LIHEAP HARRP	
Telephone						
Fax						
Internet Services						
Postage						
Mobile Services				1,160		
Other (specify)				1,440		
				959		
<b>TOTAL COMMUNICATIONS</b>	0	0	0	3,559	0	0

**HEATING AND AIR REPAIR AND REPLACEMENT PROGRAM  
SUBGRANTEE ONE YEAR WORK PLAN**

**SECTION IV. PROJECT IDENTIFICATION**

- (1) Service Provider : Cabarrus County Department of Commerce
- (2) Project Name: North Carolina Heating and Air Repair and Replacement Program
- (3) Project Period: **Sept 1, 2020 to Sept 30, 2021**
- (4) HARRP Funds Requested for this Project:
- (5) Number of Households Expected to be Served: 

3
---

Project Activities	Activities by Position				
Promote and market HARRP to recruit priority populations	Admin Pool				
Conduct intake/receive applications for services from potentially eligible individuals	Admin Pool				
Determine applicant eligibility and provide appropriate notification	Admin Pool				
Establish prioritized waiting list using State rating tool	Admin Pool				
Perform initial inspection/audit including health and safety checks, share energy education information	Admin Pool	Subcontractors			
Identify measures to be installed in accordance with the N. C. State guidelines.	Admin Pool				
Identify measures to be installed in accordance with the N. C. State Priority List of Weatherization Measures for Mobile Homes in North Carolina	Admin Pool				
Complete job write-up and cost estimate, review measures to be installed with applicant, order materials, review measures and schedule work	Admin Pool				
Complete health and safety improvements, install identified energy reduction measures and evaluate effectiveness	Subcontractors				
Schedule and conduct energy education sessions and final inspection, obtain customer approval (signoff)	Admin Pool				
Maintain files, complete data entries into AR4CA and submit financial reports	Admin Pool				
Provide continuous training for staff and contractors on the technical aspects of weatherization and health and safety	Admin Pool				
Evaluate program effectiveness	Admin Pool	Agency Board			

**HEATING AND AIR REPAIR AND REPLACEMENT PROGRAM  
SUBGRANTEE ONE YEAR WORK PRODUCTION SCHEDULE**

**SECTION V. PROJECT DESCRIPTION**

- (1) HARRP Service Provider: Cabarrus County Department of Commerce
- (2) Project Name: North Carolina Heating and Air Repair and Replacement Program
- (3) One-Year Objective:

Weatherize, in accordance with state requirements, 3 units occupied by individuals and families who meet the prescribed eligibility requirements, in the following counties by June 30, 2020 (include # units per county)

COUNTY	UNITS
Cabarrus	3

COUNTY	UNITS

This production schedule should be considered carefully. Please consider holidays and local weather when planning production.

JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
1							1	1			

## **ATTACHMENT D**

### **SUBGRANTEE CONFLICT OF INTEREST POLICY**

COMMUNITY DEVELOPMENT CODE OF CONDUCT  
For the Period of June 15, 2020-June 15, 2023

HATCH ACT

No employee or agent of the County may perform any function during work hours that is considered political activity. This includes: soliciting votes, transporting voters, distributing campaign materials, working or developing campaign materials, etc.

NON DISCRIMINATION

No person shall, on the grounds of race, color, national origin, handicap, or sex be excluded from participation in, be denied the benefits of, or be subject to discrimination under any program or activity funded in whole or in part with Community Development funds.

ENGAGEMENT IN PROCUREMENT

No employee, officer, or agent of the County shall participate in the selection or award of a contract supported by federal funds if a conflict of interest, real or apparent would be involved. Such a conflict would arise when:

- a) The employee, officer, or agent;
- b) Any member of his/her immediate family;
- c) His or her partner; or
- d) An organization which employs or is about to employ, any of the above, has a financial or other interest in the firm selected for award.

The grantee's officers, employees, or agents shall neither solicit nor accept gratuities, favors or anything of monetary value from contractors, potential contractors or parties to subagreements.

CONFLICT OF INTEREST

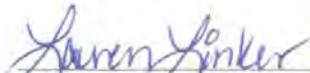
No employee or agent shall influence or attempt to influence the outcome of any case or matter in which he has a direct interest either personally or in the person of any relative by blood or marriage. Employees or agents so involved shall abstain from dealing with such matters; they may provide information at the request of the County, but shall not attempt to influence the decision of the County.

Adopted this 15<sup>th</sup> day of June, 2020.

06/16/20  
Date

By:   
Stephen M. Morris, Chairman  
Board of Commissioners

Attest:

  
Clerk to the Board



**ATTACHMENT E**

**CERTIFICATION OF NO OVERDUE TAX DEBTS**

ATTACHMENT E

The certification of no overdue tax debts does not apply. Cabarrus County is a governmental entity.

**ATTACHMENT F**

**NOTICE OF CERTAIN REPORTING AND AUDIT  
REQUIREMENTS**

**ATTACHMENT F**  
**Notice of Certain Reporting and Audit Requirements**

Subgrantees, local governments, and public authorities shall comply with all rules and reporting requirements established by statute or administrative rules. All reports must be submitted to the addresses below.

**Subgrantees**

The applicable prescribed requirements are found in the Office of the State Auditor's Audit Advisory #ADV-2005-001, North Carolina General Statute 143C-6-22 & 23 and Implementation of Required Rules, 09 NCAC 03M .0102 -0802, North Carolina Administrative Code. The Office of State Auditor's Audit Advisory #ADV-2005-001, additional policy statements, access to the Grants Information Center and forms are available on the State Auditor's Internet web site at [www.ncauditor.net](http://www.ncauditor.net). From the home page select "Grants". Select the "Regulations" tab for the standards and the "Forms" tab to download forms as needed.

N.C.G.S. §143C-6-23 requires every nongovernmental entity that receives State or Federal pass-through grant funds directly from a State agency to file annual reports on how those grant funds were used. There are 3 reporting levels which are determined by the total direct grant receipts from all State agencies in your fiscal year:

- Level 1: Less than \$25,000
- Level 2: At least \$25,000 but less than \$500,000
- Level 3: \$500,000 or more

A Subgrantee's reporting date is determined by its fiscal year end and the total funding received directly from all State agencies. For those Subgrantees receiving less than \$500,000, the due date is 6 months from its fiscal year end. For those receiving \$500,000 or more, the due date is 9 months from its fiscal year end. In addition to the reports, Subgrantees receiving \$500,000 or more must submit a yellow book audit in electronic or hard copy to the Office of the State Auditor and to all funding State agencies at the addresses below.

**All annual Subgrantee reports required by GS 143C-6-23 must be uploaded to ShareFile.** Our office will be responsible for reporting this information in the NC Enterprise Business Services System (EBS) by your required due date.

### IMPORTANT NOTE FOR AUDITS

If the Subgrantee expends more than \$750,000 in Federal grant funds from all sources, then it must have a 2 CFR 200 Subpart F audit performed. If you are at this level for Federal reporting, the Subgrantee may use the 2 CFR 200 audit to comply with State statutes under N.C.G.S. §143C-6-23.

If you are required to have a 2 CFR 200 audit performed and you receive any Federal grant funds passed through the Department, you are required to file the 2 CFR 200 audit with the Department.

If you expend more than \$750,000 and you are required to file a yellow book audit with the State Auditor under G.S. 143C-6-23, then you are also required to file the yellow book audit with the Department.

All audits must be completed within 9 months of the Subgrantee's fiscal year.

Fiscal Year for Cabarrus County Planning and Development Services Department: July 1 to June 31

Please upload the required audit to your ShareFile audit folder.

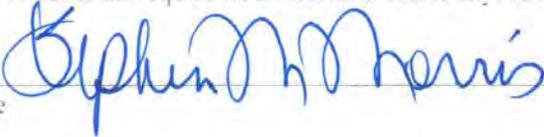
**ATTACHMENT G**

**CERTIFICATION REGARDING LOBBYING,  
DEBARMENT, DRUG-FREE WORKPLACE,  
ENVIRONMENTAL TOBACCO SMOKE**

**ATTACHMENT G  
FEDERAL CERTIFICATIONS**

**The undersigned states that:**

1. He or she is the duly authorized representative of the Vendor named below:
2. He or she is authorized to make, and does hereby make, the following certifications on behalf of the Vendor, as set out herein:
  - a. The Certification Regarding Nondiscrimination;
  - b. The Certification Regarding Drug-Free Workplace Requirements;
  - c. The Certification Regarding Environmental Tobacco Smoke;
  - d. The Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions; and
  - e. The Certification Regarding Lobbying;
3. He or she has completed the Certification Regarding Drug-Free Workplace Requirements by providing the addresses at which the contract work will be performed:
4. [Check the applicable statement]
  - He or she **has completed** the attached **Disclosure of Lobbying Activities** because the Vendor **has made, or has an agreement to make**, a payment to a lobbying entity for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action:
  - OR**
  - He or she **has not completed** the attached **Disclosure of Lobbying Activities** because the Vendor **has not made, and has no agreement to make**, any payment to any lobbying entity for influencing or attempting to influence any officer or employee of any agency, any Member of Congress, any officer or employee of Congress, or any employee of a Member of Congress in connection with a covered Federal action.
5. The Vendor shall require its subcontractors, if any, to make the same certifications and disclosure.

 _____ Signature	Chairman of Board of Commissioners _____ Title
Cabarrus County _____ Vendor	6/23/2020 _____ Date

[This Certification Must Be Signed By The Same Individual Who Signed The Proposal Execution Page]

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**I. Certification Regarding Nondiscrimination**

The Vendor certifies that it will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (h) the Food Stamp Act and USDA policy, which prohibit discrimination on the basis of religion and political beliefs; and (i) the requirements of any other nondiscrimination statutes which may apply to this Agreement.

.....

**II. Certification Regarding Drug-Free Workplace Requirements**

- 1. **The Vendor certifies** that it will provide a drug-free workplace by:
  - A. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Vendor's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
  - B. Establishing a drug-free awareness program to inform employees about:
    - (1) The dangers of drug abuse in the workplace;
    - (2) The Vendor's policy of maintaining a drug-free workplace;
    - (3) Any available drug counseling, rehabilitation, and employee assistance programs; and
    - (4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
  - C. Making it a requirement that each employee be engaged in the performance of the agreement be given a copy of the statement required by paragraph (a);
  - D. Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under the agreement, the employee will:
    - (1) Abide by the terms of the statement; and
    - (2) Notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five days after such conviction;
  - E. Notifying the Department within ten days after receiving notice under subparagraph (d)(2) from an employee or otherwise receiving actual notice of such conviction;
  - F. Taking one of the following actions, within 30 days of receiving notice under subparagraph (d)(2), with respect to any employee who is so convicted:
    - (1) taking appropriate personnel action against such an employee, up to and including termination; or
    - (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency; and
  - G. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (a), (b), (c), (d), (e), and (f).
- 2. The sites for the performance of work done in connection with the specific agreement are listed below (list all sites; add additional pages if necessary):  
Street Address No. 1: 65 Church Street, SE, Ste 280  
  
City, State, Zip Code: Concord, North Carolina 28025  
  
Street Address No. 2: 246 General Services Drive  
  
City, State, Zip Code: Concord, NC 28027
- 3. Vendor will inform the Department of any additional sites for performance of work under this agreement.
- 4. False certification or violation of the certification may be grounds for suspension of payment, suspension or termination of grants, or government-wide Federal suspension or debarment. 45 C.F.R. 82.510.

### III. Certification Regarding Environmental Tobacco Smoke

Public Law 103-227, Part C-Environmental Tobacco Smoke, also known as the Pro-Children Act of 1994 (Act), requires that smoking not be permitted in any portion of any indoor facility owned or leased or contracted for by an entity and used routinely or regularly for the provision of health, day care, education, or library services to children under the age of 18, if the services are funded by Federal programs either directly or through State or local governments, by Federal grant, contract, loan, or loan guarantee. The law does not apply to children's services provided in private residences, facilities funded solely by Medicare or Medicaid funds, and portions of facilities used for inpatient drug or alcohol treatment. Failure to comply with the provisions of the law may result in the imposition of a civil monetary penalty of up to \$1,000.00 per day and/or the imposition of an administrative compliance order on the responsible entity.

**The Vendor certifies** that it will comply with the requirements of the Act. The Vendor further agrees that it will require the language of this certification be included in any subawards that contain provisions for children's services and that all Subgrantees shall certify accordingly.

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### IV. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions

#### Instructions

[The phrase "prospective lower tier participant" means the Vendor.]

1. By signing and submitting this document, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of the fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originate may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant will provide immediate written notice to the person to whom this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549, 45 CFR Part 76. You may contact the person to whom this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter any lower tier covered transaction with a person who is debarred, suspended, determined ineligible or voluntarily excluded from participation in this covered transaction unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this document that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion--Lower Tier Covered Transaction," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List.
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

9. Except for transactions authorized in paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension, and/or debarment.

#### **Certification**

- a. **The prospective lower tier participant certifies**, by submission of this document, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- b. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

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#### **V. Certification Regarding Lobbying**

**The Vendor certifies**, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federally funded contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form SF-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award document for subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) who receive Federal funds of \$100,000.00 or more and that all subrecipients shall certify and disclose accordingly.
4. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000.00 and not more than \$100,000.00 for each such failure.

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#### **VI. Disclosure of Lobbying Activities**

##### **Instructions**

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Use the SF-LLL-A Continuation Sheet for additional information if the space on the form is inadequate. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.

4. Enter the full name, address, city, state and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or sub-award recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in Item 4 checks "Subawardee", then enter the full name, address, city, state and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (Item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal Identifying number available for the Federal action identified in Item 1 (e.g., Request for Proposal (RFP) number, Invitation for Bid (IFB) number, grant announcement number, the contract grant, or loan award number, the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in Item 4 or 5.
10. (a) Enter the full name, address, city, state and zip code of the lobbying entity engaged by the reporting entity identified in Item 4 to influence the covered Federal action.  
(b) Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name and Middle Initial (MI).
11. Enter the amount of compensation paid or reasonably expected to be paid by the reporting entity (Item 4) to the lobbying entity (Item 10). Indicate whether the payment has been made (actual) or will be made (planned). Check all boxes that apply. If this is a material change report, enter the cumulative amount of payment made or planned to be made.
12. Check the appropriate boxes. Check all boxes that apply. If payment is made through an in-kind contribution, specify the nature and value of the in-kind payment.
13. Check the appropriate boxes. Check all boxes that apply. If other, specify nature.
14. Provide a specific and detailed description of the services that the lobbyist has performed, or will be expected to perform, and the date(s) of any services rendered. Include all preparatory and related activity, not just time spent in actual contact with Federal officials. Identify the Federal official(s) or employee(s) contacted or the officer(s), employee(s), or Member(s) of Congress that were contacted.
15. Check whether or not a SF-LLL-A Continuation Sheet(s) is attached.
16. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

Public reporting burden for this collection of information is estimated to average 30 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, D. C. 20503



**ATTACHMENT H**

**IRS FEDERAL TAX-EXEMPT LETTER or  
501 C VERIFICATION FORM  
(if applicable)**

ATTACHMENT H

IRS FEDERAL TAX-EXEMPT LETTER OF 501-C VERIFICATION FORM

The Certification of IRS Federal Tax Exempt status does not apply. Cabarrus County is a governmental entity.

### Budget Revision/Amendment Request

Date: 2/15/2021

Amount: 23,059.00

Dept. Head: Kelly Sifford

Department: Planning and Development

Internal Transfer Within Department

Transfer Between Departments/Funds

Supplemental Request

The amendment is connected with a new contract for CARES funding in the Weatherization program. It assigns the revenues and expenses associated with the contract.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
00163250	6227	CARES	Weatherization Program Grant	-	23,059.00		23,059.00
00193250	9315	CARES	Health and Safety		3,559.00		3,559.00
00193250	9384	CARES	Materials		14,625.00		14,625.00
00193250	949301	CARES	Operations	-	4,875.00		4,875.00
							0.00
							0.00
							0.00
							0.00

**Total** 0.00

**Budget Officer**

**County Manager**

**Board of Commissioners**

Approved

Approved

Approved

Denied

Denied

Denied

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

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*Signature*

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*Date*

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*Date*

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

**February 15, 2021  
6:30 PM**

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### **AGENDA CATEGORY:**

Reports

### **SUBJECT:**

BOC - Receive Updates From Commission Members who Serve as Liaisons to Municipalities or on Various Boards/Committees

### **BRIEF SUMMARY:**

This time is allotted during regular meetings to receive updates from commission members that serve as liaisons to local municipalities or that serve on various boards/committees, if needed. This opportunity allows the board as a whole to learn more about what is going on with the boards each commissioner is individually involved with.

### **REQUESTED ACTION:**

Receive updates and discuss as needed.

### **EXPECTED LENGTH OF PRESENTATION:**

1 Minute

### **SUBMITTED BY:**

Lauren Linker, Clerk to the Board

### **BUDGET AMENDMENT REQUIRED:**

No

### **COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

### AGENDA CATEGORY:

Reports

### SUBJECT:

BOC - Request for Applications for County Boards/Committees

### BRIEF SUMMARY:

Vacant Positions on the Cabarrus County Boards & Committees are as follows:

Boards & Committees	Vacancies/Expiring/Expired Terms	Term Expiration and/or Position
Active Living & Parks Commission	2	*
Adult Care Home Community Advisory Committee	7	**
Agricultural Advisory Board	2	*
Animal Protection Advisory Board	n/a	*
Board of Equalization & Review	n/a	*
Centralina Workforce Development Board	n/a	*
Concord Planning Commission (ETJ)	1	*
Early Childhood Task Force Advisory Board	n/a	*
Harrisburg Fire Advisory Board	1	*
Harrisburg Planning & Zoning Board and Board of Adjustment (ETJ)	n/a	*
Home & Community Care Block Grant Committee	n/a	*
Human Services Advisory Board	1	*

Industrial Facilities & Pollution Control Financing Authority	n/a	*
Jury Commission	n/a	*
Juvenile Crime Prevention Council	2	*
Library Board of Trustees	1	*
Mental Health Advisory Board	4	*
Mt. Pleasant Planning Board & Board of Adjustment	n/a	
Nursing Home Community Advisory Board	8	**
Planning & Zoning Commission	n/a	*
Public Health Authority of Cabarrus County	n/a	*
Region F Aging Advisory Committee	1	*
Rowan-Cabarrus Community College Board of Trustees	n/a	*
Senior Centers Advisory Council	n/a	*
Tourism Authority	n/a	*
Transportation Advisory Board	3	*
Water & Sewer Authority of Cabarrus County	n/a	*
Youth Commission	4	A.L. Brown, Jay M. Robinson, & At-large high schools

\*Term lengths and expirations vary per board roster.

\*\*Initial terms are for one year. Additional terms are for three years.

A description of each board/committee is attached along with an application for appointment. Visit the County's website to complete the online application. For more information, contact the Clerk at 704-920-2109 or go to <https://www.cabarruscounty.us/boards-and-committees>.

**REQUESTED ACTION:**

Review the aforementioned list of County Boards/Committees for the benefit of the viewing audience and encourage citizens to participate.

**EXPECTED LENGTH OF PRESENTATION:**

1 Minute

**SUBMITTED BY:**

Lauren Linker, Clerk to the Board

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- ▣ Boards & Committees Descriptions
- ▣ Concord ETJ Map
- ▣ Harrisburg ETJ Map
- ▣ Application
- ▣ Youth Commission Application

## **CABARRUS COUNTY**

### **BOARDS, COMMITTEES, COMMISSIONS AND AUTHORITIES**

The Cabarrus County Board of Commissioners makes appointments to a number of boards, committees, commissions and authorities. All citizens of Cabarrus County are encouraged to volunteer to serve on these boards/committees. To obtain an application for appointment or for more information, please contact the Clerk to the Board, at the Governmental Center, 65 Church Street, SE, Concord, or call (704) 920-2109. The application may also be downloaded from the County's website at [www.cabarruscounty.us](http://www.cabarruscounty.us).

A listing of the boards/committees is as follows:

#### **ACTIVE LIVING AND PARKS COMMISSION**

This commission advises on parks and recreation needs of County residents and assists the Parks Department in planning facilities and operational activities. The 11-member commission includes a representative from each of the 7 planning areas (Concord, Eastern, Kannapolis, Central, Midland, Northwest Cabarrus and Harrisburg), 2 at-large representatives, 1 representative from the Cabarrus School Board and 1 representative from the Kannapolis School Board. Appointments are for terms of three years.

#### **ADULT CARE HOME COMMUNITY ADVISORY COMMITTEE**

This committee seeks to maintain the intent of the Adult Care Home Residents Bill of Rights and to promote community involvement with the homes (homes for the aged, family care homes and homes for developmentally disabled adults). Members cannot be employed by an adult care home nor have any financial interest, directly or indirectly, in an adult care home. Immediate family of an adult care home resident in Cabarrus County cannot serve on the committee. Initial appointment is for a term of one year with successive appointments of three-year terms.

#### **AGRICULTURAL ADVISORY BOARD**

The Agricultural Advisory Board is designed to implement the provisions of the Voluntary Agricultural District Ordinance. The Board is charged with accepting applications to the voluntary agricultural districts, promoting the enhancement of agriculture in our county, and assisting the Cabarrus County Commissioners with information and positions regarding decisions impacting agricultural production in our county.

#### **ANIMAL PRESERVATION & PROTECTION ADVISORY COMMITTEE**

The committee's purposes are outlined as follows: (1) Review current operations of Cabarrus County Animal Control; (2) Provide educational materials in several languages to the Cabarrus County residents on Spay/Neuter, proper feeding, housing and healthcare for pets; (3) Establish a protocol for the availability for low cost spaying and neutering of pets belonging to indigent residents of Cabarrus County. Members serve two-year terms.

### **BOARD OF EQUALIZATION AND REVIEW**

This board: (1) reviews the tax lists of the county for the current year to assure that all property is listed and appraised accurately; (2) hears any property owner's appeal concerning the value assigned to his property (or that of others); and (3) has the authority to make adjustments necessary to bring the valuation into line with the standards established by law. Members serve three-year terms.

### **CABARRUS COUNTY PLANNING AND ZONING COMMISSION**

This commission serves a key role in shaping the future development of the county as it reviews subdivisions, assists in area plans, and makes land use decisions, some of which are forwarded to the Board of Commissioners. The commission also serves as the Board of Adjustment that hears and decides appeals of decisions by the Zoning Enforcement Officer, and grants special use permits/variances. Members include a representative from each of the 7 planning areas (Concord, Midland, Central, Eastern, Harrisburg, Kannapolis and Northwest Cabarrus), 2 at-large representatives and 3 Alternate members. Appointments are for terms of three years.

### **CENTRALINA WORKFORCE DEVELOPMENT BOARD**

This group serves as the governing body for a variety of programs and their plans, including the Job Training Partnership Act, Work First (JOBS) welfare and placement programs, the Older Worker Americans Act Job Training and Employment Program, etc. The County Commissioners appoint 4 persons representing Education, Organized Labor and the Private Sector (2) to serve on this six-county, 20-member board. Appointments are for terms of two years.

### **CONCORD PLANNING AND ZONING COMMISSION**

The Commission guides, reviews and regulates land developments within and around the boundaries of the City of Concord. The County Commissioners appoint one member who resides in Concord's extraterritorial jurisdiction area for a term of three years.

### **HARRISBURG FIRE ADVISORY BOARD**

The Harrisburg Fire Advisory Board advises the Town Council, Town Administrator and the Fire Chief on matters of policy, administration and operations. The board tracks the progress of the Harrisburg Fire Department's key objectives as outlined in the annual report, reviews the Department's By-Laws on an annual basis, and recommends changes to the Town Council for final approval.

### **HARRISBURG PLANNING AND ZONING BOARD**

This board reviews, regulates development within and around the boundaries of the Town of Harrisburg and hears and decides on appeals of zoning within the Town's jurisdiction. The County Commissioners appoint one person who resides in the extraterritorial jurisdiction of the Town to serve for a term of three years.

### **HOME AND COMMUNITY CARE BLOCK GRANT ADVISORY COMMITTEE**

This advisory committee assists the Department of Aging with the development of the County Aging Funding Plan through the Home and Community Care Block Grant for Older Adults. The committee is composed of potential public and private providers of aging services, elected county officials, older adults and representatives of other aging interests in the county.

### **HUMAN SERVICES ADVISORY BOARD**

This board is appointed by the Board of Commissioners to advocate, advise and consult regarding services within the Department of Human Services. The board is composed of five members who are appointed for three-year terms.

In the first year of organization, the terms will be staggered with three members appointed to three-year terms and two members appointed to two-year terms.

### **INDUSTRIAL FACILITIES AND POLLUTION CONTROL FINANCING AUTHORITY**

This authority provides for the issuance of revenue bonds to aid in financing (1) industrial and manufacturing facilities which provide job opportunities or better ways to help alleviate unemployment and raise below-average manufacturing wages and (2) pollution control facilities for industries. The 7-member authority meets as needed. Appointments are for terms of six years.

### **JURY COMMISSION**

This commission is responsible for compiling the jury lists for the Courts. The Board of Commissioners appoints one member for a term of two years to the 3-member commission.

### **JUVENILE CRIME PREVENTION COUNCIL**

The council plans for the needs of adjudicated and at-risk youth and assesses the need for delinquency treatment and prevention services in Cabarrus County. The 25-member council is made up of a variety of judicial and public agency representatives as well as seven at-large members. Appointments are for terms of two years.

### **LIBRARY BOARD OF TRUSTEES**

The board advises the County Commissioners on matters relating to the Cabarrus County Library system, including the planning of programs, policies, facilities and budgetary matters. The seven-member board includes representatives selected from the areas of Concord (one member appointed by the Concord City Council and one member appointed by the County Commissioners), Mt. Pleasant, Harrisburg, Midland, and Kannapolis (2). Appointments are for terms of three years.

### **MOUNT PLEASANT PLANNING BOARD AND BOARD OF ADJUSTMENT**

This board guides, reviews, regulates land development within and around the boundaries of the Town of Mt. Pleasant and hears and decides on appeals of zoning within the Town's jurisdiction. The Board of Commissioners appoints two persons who reside within the Town's extraterritorial jurisdiction area for terms of three years.

### **NURSING HOME COMMUNITY ADVISORY COMMITTEE**

This committee seeks to maintain the intent of the Nursing Home Residents Bill of Rights for those persons residing in nursing homes, works to ensure appropriate conditions within the nursing homes and promotes community involvement with those homes. Members cannot be employed by a nursing home nor have any financial interest, directly or indirectly, in a nursing home. Also, no immediate family of a nursing home resident in Cabarrus County can serve on the committee. Initial appointments are made for terms of one year with successive appointments of three years.

## **PUBLIC HEALTH AUTHORITY OF CABARRUS COUNTY**

The authority seeks to enhance public/private health care partnerships, stabilize county dollars going to support health services, and to provide consolidation and long range planning for health services. It also acts as the local board of health and is charged to protect and promote the public health of the citizens of Cabarrus County. Membership is as follows: Member or designee of the Board of County Commissioners; Member of the Cabarrus County Medical Society; Member of the Cabarrus Physicians Organization; Member or designee of the CMC-NorthEast Medical Center Board of Trustees; and three members from the general public not affiliated with the above organizations, but recommended by the nominees of those organizations.

## **REGION F AGING ADVISORY COMMITTEE**

This committee advises the Centralina Council of Governments (COG) staff and COG Board on area plans for the aging within the nine-county region. County Commissioners appoint three members and one alternate to the 26-member regional committee. The appointments are for terms of two years except for the alternate appointment, which is a one-year term.

## **ROWAN-CABARRUS COMMUNITY COLLEGE (RCCC) BOARD OF TRUSTEES**

This board governs the operation of the community college according to State law. The Cabarrus County Board of Commissioners makes two four-year appointments to the Board of Trustees.

## **SENIOR CENTERS ADVISORY COUNCIL**

The Senior Centers Advisory Council aids in determining senior citizen activities to be provided by the County as well as activities and operations at the senior centers. The council is comprised of 11 members who work closely with the Active Living and Parks Department and Senior Center staff. Appointments are for three-year terms.

## **TOURISM AUTHORITY**

This 9-member board is charged with the development of tourism, tourist-related events, facilities and other activities that serve to increase the amount of tourism in the County. The Board of Commissioners appoints membership as follows: Three members, including a County Commissioner and/or County Manager; three members from recommendations submitted by the Cabarrus County Tourism Authority; and three members from recommendations submitted by the Cabarrus Regional Chamber of Commerce. Appointments are for terms of three years.

## **TRANSPORTATION ADVISORY BOARD**

This board works to advance coordination between the County and human service agencies, to monitor transportation services and to advise the Board on issues related to human service transportation policy matters. Members include representatives from the Department of Social Services, Cabarrus Health Alliance, Department of Aging, Cabarrus EMS, L.I.F.E. Center, Cabarrus Workshop, Healthy Cabarrus, Head Start, Piedmont Behavioral Healthcare and a representative of the visually impaired in the county.

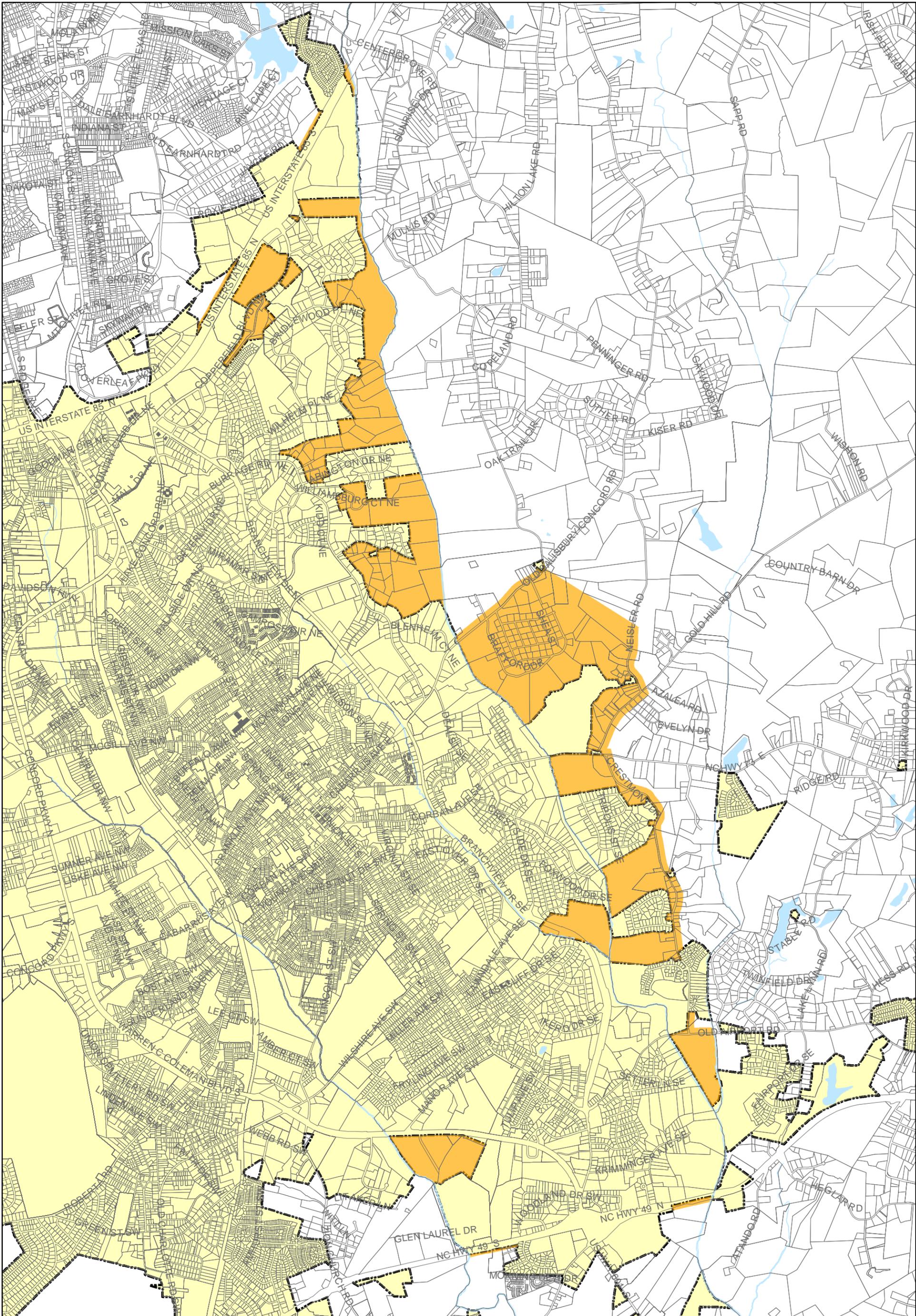
## **WATER & SEWER AUTHORITY OF CABARRUS COUNTY**

The Water and Sewer Authority (WSACC) was established in 1992 by Cabarrus County and the four municipalities for the purpose of planning, constructing, owning, operating and maintaining water and sewer facilities in Cabarrus County. Membership of the board is as

follows: two members appointed by Cabarrus County; two members appointed by the City of Concord; two members appointed by the City of Kannapolis; one member appointed by the Town of Harrisburg; one member appointed by the Town of Mt. Pleasant; and one at-large member appointed by Cabarrus County with the advice of the municipalities. Appointments are for terms of three years.

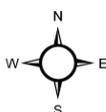
## **YOUTH COMMISSION**

The purpose of the Youth Commission is to provide teens in the community an opportunity to be active citizens. Through experiences and education, youth will be empowered in the community. The Youth Commission will expose teens to county government, allow teens an opportunity to discuss issues, and interact with county commissioners and employees through youth-adult partnerships.

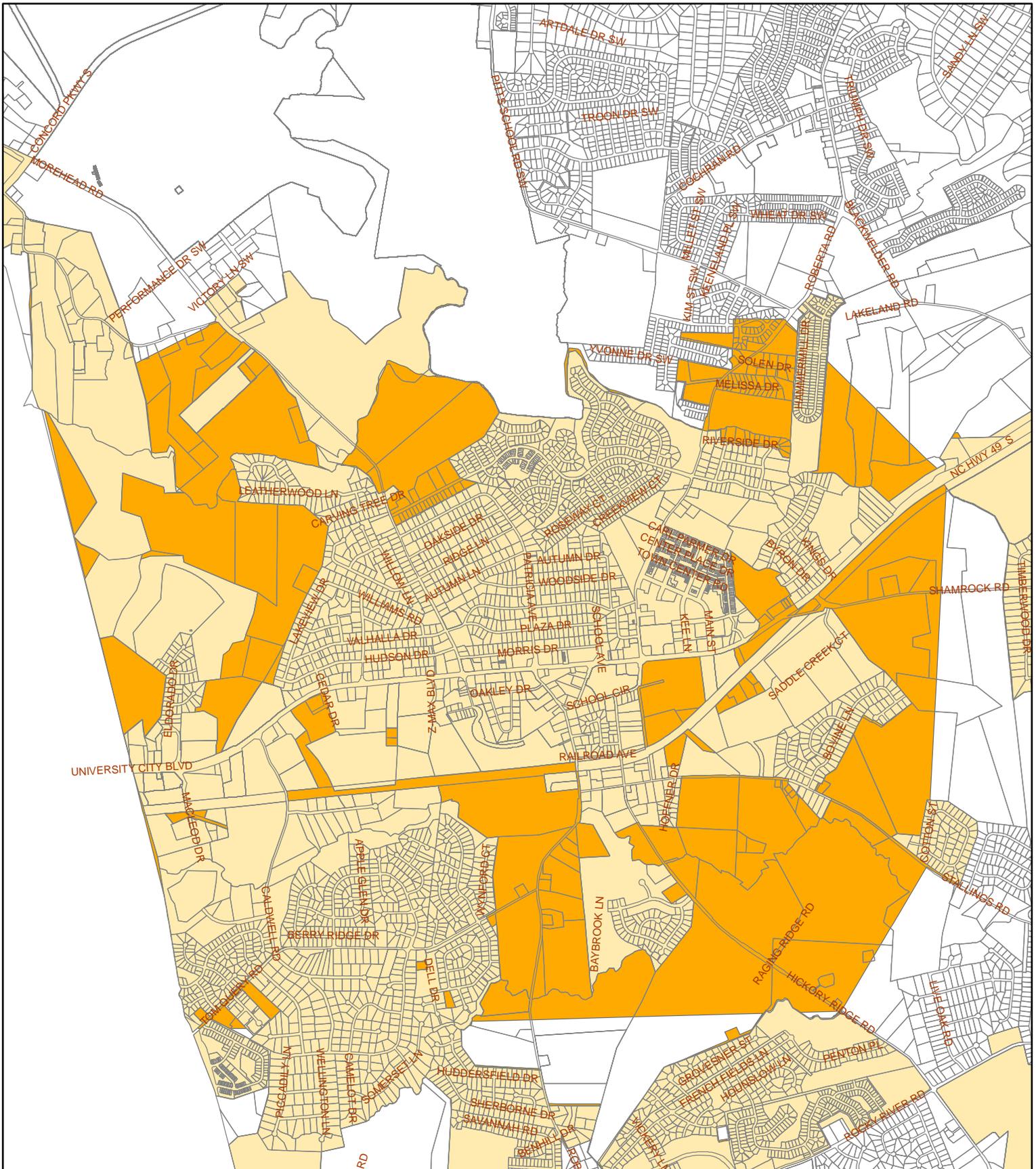


**City of Concord  
Extraterritorial Jurisdiction (ETJ)**

- ETJ
- City of Concord
- Parcels
- Rivers
- Lakes & Ponds

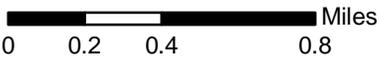


0 0.25 0.5  
Miles



**Legend**

- Tax Parcels
- Harrisburg Municipal Limits
- Harrisburg ETJ Boundary



**Town of Harrisburg, NC  
ETJ Boundary**

Cabarrus County shall not be held liable for any errors in these data. This includes errors of omission, commission, errors concerning the content of the data, and relative and positional accuracy of the data. These data cannot be construed to be a legal document. Primary sources from which these data were compiled must be consulted for verification of information contained within the data.

Map Prepared by Cabarrus County Planning Services, June 2009.

Office Use Only  
DATE RECEIVED:

## Application for Appointment to Cabarrus County Advisory Boards and Committees

The Cabarrus County Board of Commissioners believes that all citizens should have the opportunity to participate in governmental decisions. One way of participating is by serving as a citizen member of one of the County's various advisory boards. If you wish to be considered for appointment to an advisory board, please complete the information below and return it to the CLERK TO THE BOARD OF COMMISSIONERS, P. O. BOX 707, CONCORD, NC 28026-0707, Fax (704) 920-2820. For more information about the various boards, you may contact the Clerk at (704) 920-2109.

Advisory Board(s) / Committee(s) Interested In: (Please list in order of preference)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

XXXXXXXXXXXX

Name: \_\_\_\_\_

Home Address: \_\_\_\_\_

Mailing Address (if different): \_\_\_\_\_

City / State / ZIP: \_\_\_\_\_

Resident of Cabarrus County:  Yes  No

Telephone: Home: \_\_\_\_\_ Work: \_\_\_\_\_

Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

Business Address: \_\_\_\_\_

City / State / Zip: \_\_\_\_\_

Do You Have a N. C. Driver's License?  Yes  No Age (optional): \_\_\_\_\_

Number hours available per month for this position: \_\_\_\_\_

Best time of day/or days available: \_\_\_\_\_

- over -

Educational Background: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Business and Civic Experience: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Areas of Interest / Skills: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Other County Boards / Committees / Commissions presently serving on: \_\_\_\_\_  
 \_\_\_\_\_ Term Expiration Date: \_\_\_\_\_

Have you ever been charged with and / or convicted of a criminal offense? \_\_\_\_\_ If so, please explain \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**References**

List three persons who are not related to you and who have definite knowledge of your qualifications and fitness for the position for which you are applying.

Name	Business / Occupation	Address	Telephone

I understand that this application will be kept on active file for two years and I hereby authorize Cabarrus County to verify all information included in this application. I further understand this application is subject to the N. C. Public Records Law (NCGS 132-1) and may be released upon request. Meetings of the appointed boards and committees are subject to the N. C. Open Meetings Law (NCGS 143-318.10).

\_\_\_\_\_ Date \_\_\_\_\_ Signature of the Applicant

**Cabarrus County Youth Commission  
Application**

Full Name: \_\_\_\_\_ M \_\_\_\_ F (check one)

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone (home): (\_\_\_\_) \_\_\_\_\_ (cell): (\_\_\_\_) \_\_\_\_\_

E-mail: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Name(s) of Parents or Guardians: \_\_\_\_\_

High School: \_\_\_\_\_ Grade: \_\_\_\_\_

Cumulative High School GPA: \_\_\_\_\_ Year of Expected Graduation: \_\_\_\_\_

School groups/clubs/activities in which you participate: \_\_\_\_\_

\_\_\_\_\_  
List other activities you have been involved in through church, clubs, community, etc. \_\_\_\_\_

\_\_\_\_\_  
What interests you about being a member of the Youth Commission? \_\_\_\_\_

\_\_\_\_\_  
What do you hope to accomplish though being a member of the Youth Commission? What do you hope to learn?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are you available for evening meetings? \_\_\_\_\_

References:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Relationship to you: \_\_\_\_\_

Applicant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent/Guardian Signature: \_\_\_\_\_

Please return this application in person or via mail to:

Lauren Linker  
Clerk to the Board  
Cabarrus County  
P.O. Box 707  
Concord, NC 28026-0707  
Fax: 704-920-2820  
lelinker@cabarruscounty.us



# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Reports

**SUBJECT:**

Budget - Monthly Financial Update

**BRIEF SUMMARY:**

The County Manager requested monthly reports from Finance displaying relevant information regarding the year-to-date budget.

**REQUESTED ACTION:**

For informational purposes. No action required.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Rosh Khatri, Budget Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- Report

**Cabarrus County, North Carolina**  
**General Fund**  
**Statement of Revenues and Expenditures - Budget and Actual**  
**As of January 31, 2021\***

\*this report was pulled prior to month end close

	Budgeted Amounts		Actual Amounts	Encumbrances*	Variance with Final Budget	% Collected or Used
	Original	Final				
<b>REVENUES</b>						
Ad Valorem Taxes & Interest	(204,959,679)	(204,959,679)	(170,159,240)	\$ -	\$ 34,800,440	83.0%
Other Taxes	(28,017,701)	(28,017,701)	(15,448,931)	-	12,568,770	55.1%
Intergovernmental Revenues	(21,136,525)	(22,850,493)	(10,327,817)	-	12,522,677	45.2%
Permits and Fees	(7,747,427)	(7,747,427)	(6,578,618)	-	1,168,809	84.9%
Sales and Services	(13,485,653)	(13,490,653)	(6,045,402)	-	7,445,251	44.8%
Investment Earnings	(582,961)	(582,961)	(138,904)	-	444,057	23.8%
Miscellaneous/Other Finance Sources	(355,580)	(20,237,508)	(332,230)	-	19,905,279	1.6%
<b>TOTAL REVENUES</b>	<b>(276,285,526)</b>	<b>(297,886,423)</b>	<b>(209,031,141)</b>	<b>\$ -</b>	<b>\$ 88,855,282</b>	<b>70.2%</b>
<b>EXPENDITURES</b>						
<b>GENERAL GOVERNMENT</b>						
Board of Commissioners	\$ 1,229,742	\$ 1,229,742	\$ 602,172	\$ 10,162	617,408	49.0%
County Manager	2,105,879	2,142,072	1,062,967	-	1,079,105	49.6%
Communications	741,968	756,968	342,938	50,500	363,530	52.0%
Human Resources	1,108,514	1,096,814	535,151	10,347	551,316	49.7%
Tax Collector	1,100,385	1,100,385	623,633	-	476,752	56.7%
Tax Administration	2,506,714	2,506,714	1,444,067	-	1,062,647	57.6%
Board of Elections	1,084,213	1,462,439	1,065,339	13,877	383,222	73.8%
Register of Deeds	628,237	628,237	401,448	-	226,789	63.9%
Finance	1,373,734	1,406,499	830,862	51,133	524,505	62.7%
Information Technology	6,519,688	6,776,828	3,574,003	460,801	2,742,024	59.5%
Non-departmental*	4,762,394	5,064,327	484,796	579,865	3,999,666	21.0%
Infrastructure & Asset Management						
Grounds Maintenance	1,642,021	1,648,379	748,064	422,945	477,370	71.0%
Administration	2,005,671	2,008,671	1,010,638	37,657	960,376	52.2%
Sign Maintenance	169,908	169,558	106,238	-	63,320	62.7%
Building Maintenance	2,442,213	2,516,379	1,190,118	593,352	732,909	70.9%
Facility Services	1,867,127	1,902,887	942,278	109,040	851,569	55.2%
Fleet Maintenance	1,036,025	1,036,375	712,864	120,315	203,196	80.4%
Contribution to Other Funds	45,875,389	62,263,844	62,160,709	-	103,135	99.8%
<b>Total General Government</b>	<b>\$ 78,199,822</b>	<b>\$ 95,717,117</b>	<b>\$ 77,838,284</b>	<b>\$ 2,459,995</b>	<b>\$ 15,418,839</b>	<b>83.9%</b>
<b>PUBLIC SAFETY</b>						
Sheriff						
Administration & Operations	\$ 21,027,148	\$ 18,164,176	8,459,457	\$ 738,725	\$ 8,965,994	50.6%
Jail	12,400,703	12,536,699	6,974,935	738,329	4,823,435	61.5%
Animal Control	871,623	871,623	525,852	1,400	344,371	60.5%
Animal Shelter	602,366	606,066	326,884	-	279,182	53.9%
Courts Maintenance	294,785	294,785	116,399	7,073	171,313	41.9%
Construction Standards	2,735,613	2,767,113	1,536,565	34,451	1,196,098	56.8%
Emergency Management	339,912	748,992	277,828	5,281	465,884	37.8%
Fire Services	1,497,133	1,507,286	852,692	132,305	522,289	65.3%
Emergency Medical Services	10,712,889	10,732,802	5,727,002	529,790	4,476,010	58.3%
Other Public Safety*	2,129,059	2,149,059	1,093,419	993,110	62,530	97.1%
<b>Total Public Safety</b>	<b>\$ 52,611,231</b>	<b>\$ 50,378,601</b>	<b>\$ 25,891,032</b>	<b>\$ 3,180,463</b>	<b>\$ 21,307,106</b>	<b>57.7%</b>

\* In order to be compliant with G.S. 159-28, all p-card transactions are encumbered in the departmental functions within their budgets

**Cabarrus County, North Carolina**  
**General Fund**  
**Statement of Revenues and Expenditures - Budget and Actual**  
**As of January 31, 2021\***

\*this report was pulled prior to month end close

	Budgeted Amounts		Actual Amounts	Encumbrances*	Variance with Final Budget	% Collected or Used
	Original	Final				
<b>ECONOMIC &amp; PHYSICAL DEVELOPMENT</b>						
Planning & Development						
Planning	\$ 831,331	\$ 834,185	\$ 372,105	\$ -	\$ 462,080	44.6%
Community Development	615,872	643,174	312,771	-	330,403	48.6%
Soil & Water Conservation	270,520	270,520	137,506	-	133,014	50.8%
Zoning Administration	233,351	233,351	134,053	-	99,298	57.4%
Economic Development Corporation	432,001	432,001	198,396	-	233,605	45.9%
Economic Development Incentives	2,484,000	4,297,818	1,813,818	21,000	2,463,000	42.7%
Other Economic & Physical Development*	1,872,792	1,872,792	419,454	64,500	1,388,838	25.8%
<b>Total Economic &amp; Physical Development</b>	<b>\$ 6,739,867</b>	<b>\$ 8,583,841</b>	<b>\$ 3,388,104</b>	<b>\$ 85,500</b>	<b>\$ 5,110,237</b>	<b>40.5%</b>
<b>ENVIRONMENTAL PROTECTION</b>						
Waste Reduction	\$ 565,433	\$ 588,399	\$ 276,966	\$ 134,934	\$ 176,498	70.0%
<b>Total Environmental Protection</b>	<b>\$ 565,433</b>	<b>\$ 588,399</b>	<b>\$ 276,966</b>	<b>\$ 134,934</b>	<b>\$ 176,498</b>	<b>70.0%</b>
<b>HUMAN SERVICES</b>						
Veterans Services	\$ 305,545	\$ 305,545	\$ 172,661	\$ -	\$ 132,884	56.5%
Cooperative Extension	408,266	422,401	222,347	-	200,054	52.6%
Human Services						
Administration	4,433,152	4,721,509	3,221,029	309,774	1,190,706	74.8%
Economic Family Support Services	2,936,390	3,152,182	1,534,769	-	1,617,413	48.7%
Transportation	3,012,925	3,597,481	1,106,464	204,192	2,286,824	36.4%
Child Welfare	9,729,245	9,748,890	5,240,054	200,044	4,308,791	55.8%
Child Support Services	1,940,956	1,940,956	1,131,327	18,601	791,028	59.2%
Economic Services	8,816,760	8,816,760	4,665,782	-	4,150,978	52.9%
Adult and Family Services	1,977,072	1,982,072	1,102,565	29,589	849,918	57.1%
Nutrition	539,040	676,395	341,151	75,370	259,874	61.6%
Senior Services	743,886	786,600	365,609	194,523	226,468	71.2%
Other Human Services*	9,283,532	12,044,450	7,282,202	4,206,096	556,152	95.4%
<b>Total Human Services</b>	<b>\$ 44,126,769</b>	<b>\$ 48,195,240</b>	<b>\$ 26,385,961</b>	<b>\$ 5,238,190</b>	<b>\$ 16,571,090</b>	<b>65.6%</b>
<b>EDUCATION</b>						
Cabarrus County Schools Operating	\$ 74,649,650	\$ 74,649,650	\$ 49,766,838	\$ -	\$ 24,882,812	66.7%
Kannapolis City Schools Operating	9,138,615	9,138,615	6,213,405	-	2,925,210	68.0%
RCCC Operating	3,652,000	3,652,000	2,434,668	-	1,217,332	66.7%
Cabarrus County Schools Capital	36,324	36,324	27,243	-	9,081	75.0%
Kannapolis City Schools Capital	8,832	8,832	6,624	-	2,208	75.0%
RCCC Capital	-	-	-	-	-	-
Other Education*	134,405	134,405	89,601	28,136	16,668	87.6%
<b>Total Education</b>	<b>\$ 87,619,826</b>	<b>\$ 87,619,826</b>	<b>\$ 58,538,379</b>	<b>\$ 28,136</b>	<b>\$ 29,053,311</b>	<b>66.8%</b>
<b>CULTURE &amp; RECREATION</b>						
Active Living & Parks						
Parks	\$ 1,805,635	\$ 1,882,719	\$ 867,748	\$ 84,399	\$ 930,573	50.6%
Senior Centers	821,689	848,065	288,748	31,303	528,014	37.7%
Library System	3,769,254	4,046,615	2,194,690	288,311	1,563,614	61.4%
Other Cultural & Recreation*	26,000	26,000	26,000	109,800	(109,800)	522.3%
<b>Total Culture &amp; Recreation</b>	<b>\$ 6,422,578</b>	<b>\$ 6,803,399</b>	<b>\$ 3,377,186</b>	<b>\$ 513,813</b>	<b>\$ 2,912,401</b>	<b>57.2%</b>
<b>DEBT SERVICE</b>						
Schools	\$ -	\$ -	\$ -	\$ -	\$ -	-
Other	-	-	-	-	-	-
<b>Total Debt Service</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>-</b>
<b>TOTAL EXPENDITURES</b>	<b>\$ 276,285,526</b>	<b>\$ 297,886,423</b>	<b>\$ 195,695,912</b>	<b>\$ 11,641,030</b>	<b>\$ 90,549,481</b>	<b>69.6%</b>
<b>Excess (deficiency) of revenues over (under) expenditures</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 13,335,229</b>	<b>\$ (11,641,030)</b>	<b>\$ 1,694,199</b>	

\* In order to be compliant with G.S. 159-28, all p-card transactions are encumbered in the departmental functions within their budgets

**Cabarrus County, North Carolina**  
**General Fund**  
**Statement of Revenues and Expenditures - Budget and Actual**  
**As of January 31, 2021\***

\*this report was pulled prior to month end close

	Budgeted Amounts		Actual Amounts	Encumbrances*	Variance with Final Budget	% Collected or Used
	Original	Final				
<b>Arena and Events Center</b>						
<b>REVENUES</b>						
Arena Other Finance Source Revenues	\$ (1,211,324)	\$ (1,211,324)	\$ (1,018,176)	\$ -	\$ 193,148	84.1%
Fair Sales and Services	(677,739)	(677,739)	-	-	677,739	0.0%
Fair Investment Earnings	(15,000)	(15,000)	(1,584)	-	\$ 13,416	10.6%
Fair Miscellaneous Revenue	(5,000)	(5,000)	-	-	\$ 5,000	0.0%
<b>Total Arena and Events Center Fund</b>	<b>\$ (1,909,063)</b>	<b>\$ (1,909,063)</b>	<b>\$ (1,019,760)</b>	<b>\$ -</b>	<b>\$ 889,303</b>	<b>53.4%</b>
<b>EXPENDITURES</b>						
Arena and Events Center	\$ 1,211,324	\$ 1,211,324	\$ 723,134	\$ 218,824	\$ 269,366	77.8%
County Fair	697,739	697,739	86,097	10,000	601,642	13.8%
<b>Total Arena and Events Center Fund</b>	<b>\$ 1,909,063</b>	<b>\$ 1,909,063</b>	<b>\$ 809,231</b>	<b>\$ 228,824</b>	<b>\$ 871,008</b>	<b>54.4%</b>
<b>Landfill Fund</b>						
<b>REVENUES</b>						
Intergovernmental Revenues	\$ (52,000)	\$ (52,000)	\$ (12,488)	\$ -	\$ 39,512	24.0%
Permits and Fees	(140,000)	(140,000)	(67,758)	-	72,242	48.4%
Sales and Services	(1,226,000)	(1,226,000)	(551,534)	-	674,466	45.0%
Investment Earnings	(28,508)	(28,508)	(3,989)	-	24,519	14.0%
<b>Total Landfill Fund</b>	<b>\$ (1,446,508)</b>	<b>\$ (1,446,508)</b>	<b>\$ (635,769)</b>	<b>\$ -</b>	<b>\$ 810,739</b>	<b>44.0%</b>
<b>EXPENDITURES</b>						
Landfill Operations	\$ 1,446,508	\$ 1,473,863	\$ 425,882	\$ 190,937	\$ 857,044	41.9%
<b>Total Landfill Fund</b>	<b>\$ 1,446,508</b>	<b>\$ 1,473,863</b>	<b>\$ 425,882</b>	<b>\$ 190,937</b>	<b>\$ 857,044</b>	<b>41.9%</b>
<b>911 Emergency Telephone Fund</b>						
<b>REVENUES</b>						
Intergovernmental Revenues	\$ (703,112)	\$ (703,112)	\$ (351,556)	\$ -	\$ 351,556	50.0%
Investment Earnings	(2,500)	(2,500)	(333)	-	2,167	13.3%
Other Finance Sources	(63,880)	(104,319)	-	-	104,319	0.0%
<b>Total 911 Emergency Telephone Fund</b>	<b>\$ (769,492)</b>	<b>\$ (809,931)</b>	<b>\$ (351,889)</b>	<b>\$ -</b>	<b>\$ 458,042</b>	<b>43.4%</b>
<b>EXPENDITURES</b>						
Operations	\$ 709,966	\$ 750,405	\$ 213,472	\$ 56,965	\$ 479,968	36.0%
Debt Service	59,526	59,526	59,526	-	(0)	100.0%
<b>Total 911 Emergency Telephone Fund</b>	<b>\$ 769,492</b>	<b>\$ 809,931</b>	<b>\$ 272,998</b>	<b>\$ 56,965</b>	<b>\$ 479,968</b>	<b>40.7%</b>
<b>Self-Insured Funds</b>						
<b>REVENUES</b>						
Sales and Services	\$ (15,774,501)	\$ (15,774,501)	\$ (8,479,084)	\$ -	\$ 7,295,417	53.8%
Investment Earnings	(45,000)	(45,000)	(6,773)	-	38,227	15.1%
Miscellaneous	(420,000)	(1,354,424)	(938,110)	-	416,314	69.3%
Other Finance Sources	-	(199,271)	-	-	199,271	0.0%
<b>Total Self-Insured Funds</b>	<b>\$ (16,239,501)</b>	<b>\$ (17,373,196)</b>	<b>\$ (9,423,966)</b>	<b>\$ -</b>	<b>\$ 7,949,230</b>	<b>54.2%</b>
<b>EXPENDITURES</b>						
Workers Compensation Insurance	\$ 1,361,607	\$ 1,361,607	\$ 499,907	\$ 6,530	\$ 855,170	37.2%
Liability Insurance	1,154,936	2,220,361	1,879,631	-	340,730	84.7%
Dental Insurance	475,500	475,500	283,711	-	191,789	59.7%
Hospitalization Insurance	13,247,458	13,315,728	6,628,999	959,361	5,727,368	57.0%
<b>Total Self-Insured Funds</b>	<b>\$ 16,239,501</b>	<b>\$ 17,373,196</b>	<b>\$ 9,292,248</b>	<b>\$ 965,891</b>	<b>\$ 7,115,057</b>	<b>59.0%</b>

\* In order to be compliant with G.S. 159-28, all p-card transactions are encumbered in the departmental functions within their budgets

Cabarrus County, North Carolina  
General Fund  
Statement of Revenues and Expenditures - Budget and Actual  
As of January 31, 2021\*

\*this report was pulled prior to month end close

	Budgeted Amounts		Actual Amounts	Encumbrances*	Variance with Final Budget	% Collected or Used
	Original	Final				
<b>Fire Districts Fund</b>						
<b>REVENUES</b>						
Ad Valorem Taxes	\$ (5,692,557)	\$ (5,692,557)	\$ (4,390,446)	\$ -	\$ 1,302,111	77.1%
<i>Total Fire Districts Fund</i>	<u>\$ (5,692,557)</u>	<u>\$ (5,692,557)</u>	<u>\$ (4,390,446)</u>	<u>\$ -</u>	<u>\$ 1,302,111</u>	<u>77.1%</u>
<b>EXPENDITURES</b>						
Fire Districts	\$ 5,692,557	\$ 5,692,557	\$ 4,390,446	\$ -	\$ 1,302,111	77.1%
<i>Total Fire Districts Fund</i>	<u>\$ 5,692,557</u>	<u>\$ 5,692,557</u>	<u>\$ 4,390,446</u>	<u>\$ -</u>	<u>\$ 1,302,111</u>	<u>77.1%</u>
<b>TOTAL REVENUES</b>	<u>\$ (26,057,121)</u>	<u>\$ (27,231,255)</u>	<u>\$ (15,821,830)</u>	<u>\$ -</u>	<u>\$ 11,409,425</u>	<u>58.1%</u>
<b>TOTAL EXPENDITURES</b>	<u>\$ 26,057,121</u>	<u>\$ 27,258,610</u>	<u>\$ 15,190,804</u>	<u>\$ 1,442,617</u>	<u>\$ 10,625,189</u>	<u>61.0%</u>
<b>Excess (deficiency) of revenues over (under) expenditures</b>	<u>\$ -</u>	<u>\$ (27,355)</u>	<u>\$ 631,026</u>	<u>\$ (1,442,617)</u>	<u>\$ (784,236)</u>	

\* In order to be compliant with G.S. 159-28, all p-card transactions are encumbered in the departmental functions within their budgets

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Reports

**SUBJECT:**

Cabarrus County Tourism Authority FY2020 Year End Financials

**BRIEF SUMMARY:**

A report of the Cabarrus County Tourism Authority's FY2020 Year End Financial activities is attached.

**REQUESTED ACTION:**

For informational purposes. No action required.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

John Mills, Executive Vice President

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- ▣ FY2020 Audited Year End Financials
- ▣ FY2020 Form 990 Federal Return

**CABARRUS COUNTY TOURISM  
AUTHORITY  
d/b/a Cabarrus County Convention And  
Visitors Bureau**

**Financial Statements and  
Supplementary Information**

**Year Ended June 30, 2020**

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a Cabarrus County Convention and Visitors Bureau**  
Concord, North Carolina

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**BOARD MEMBERS**

Tim Hagler, Board Chair

Owen Parker, Treasurer

Angie Brown, Secretary

Pam Dubois

Pat Horton

Tammy Trexler Whaley

Steve Steinbacher

Diane Honeycutt

Pritesh Nagarji

Jay White

Terry Crawford

Eric Habschied

**APPOINTED OFFICIALS**

Donna Carpenter, President/CEO CCVB

John Mills, Executive Vice President - Finance Director

**Cabarrus County Tourism Authority**  
**d/b/a Cabarrus County Convention and Visitors Bureau**

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## INDEPENDENT AUDITORS' REPORT

To the Board of Directors  
**Cabarrus County Tourism Authority**  
d/b/a Cabarrus County Convention and Visitors Bureau  
Concord, North Carolina

### **Report on the Financial Statements**

We have audited the accompanying financial statements of the governmental activities and the major fund of **Cabarrus County Tourism Authority d/b/a/ Cabarrus County Convention and Visitors Bureau**, as of and for the year ended June 30, 2020, which collectively comprise the Bureau's basic financial statements as listed in the table of contents.

### *Management's Responsibility for the Financial Statements*

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### *Auditors' Responsibility*

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Opinion***

In our opinion, based up on our audit, the financial statements referred to above present fairly, in all material respects, the financial position of the governmental activities, and the major fund for the **Cabarrus County Tourism Authority d/b/a/ Cabarrus County Convention and Visitors Bureau** as of June 30, 2020, and the respective changes in financial position, and where applicable, cash flows thereof and the respective budgetary comparison for the general fund for the year then ended in accordance with accounting principles generally accepted in the United States of America.

### ***Other Matters***

#### ***Required Supplementary Information***

Accounting principles generally accepted in the United States of America require that the Management's Discussion and Analysis, on pages 5 through 10, and the Local Government Employees' Retirement System Schedules of the Bureau's Proportionate Share of Net Pension Liability and Bureau Contributions, on pages 31 through 32, be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted principally of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

### ***Potter & Company, PA***

Potter & Company, P.A.  
Concord, North Carolina  
November 13, 2020

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS**  
*June 30, 2020*

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As management of the Cabarrus County Tourism Authority d/b/a/ Cabarrus County Convention and Visitors Bureau (the "Bureau"), we offer readers of the Bureau's financial statements this narrative overview and analysis of the financial activities of the Bureau for the fiscal year ended June 30, 2020. We encourage readers to read the information presented here in conjunction with additional information that we have furnished in the Bureau's financial statements and notes, which follow this narrative.

**Financial Highlights**

- The assets and deferred outflows of resources of the Bureau exceed the liabilities and deferred inflows of resources at the close of the fiscal year by \$3,249,976 (Net Position).
- The Bureau's total Net Position decreased by (\$423,728) due primarily to decreases in Occupancy Tax revenues related to the travel impacts of COVID-19.
- The Bureau's total fund balance of \$3,413,606 at the end of the year is made of committed Tourism Capital Reserves fund of \$2,172,146, committed Sports Development of \$77,391, and unassigned of \$1,164,069.
- The Bureau's revenues decreased 28%, or (\$1,606,949) from the prior fiscal year mainly from decreases in Occupancy Tax revenues related to travel impacts of COVID-19. Expenses decreased by 20%, or (\$1,088,802) due to expense reductions made to offset the loss of Occupancy Tax revenues related to COVID-19.

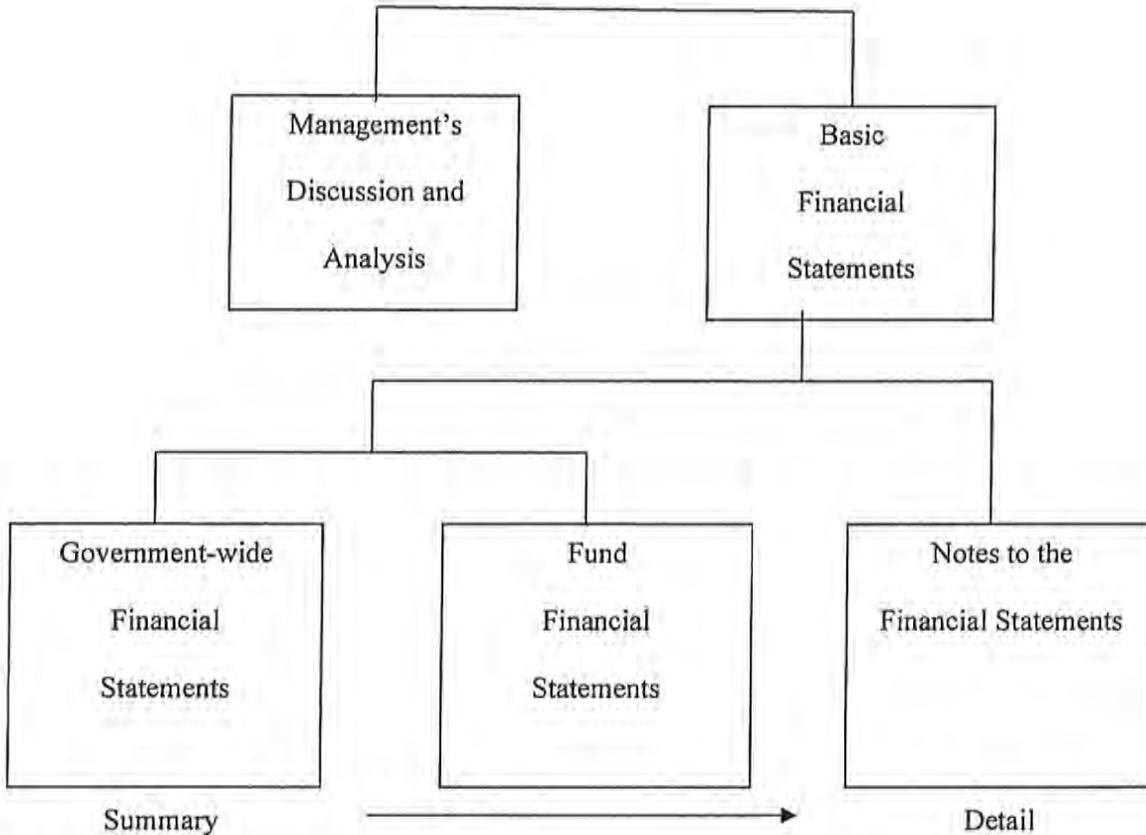
**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS**  
*June 30, 2020*

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**Overview of the Financial Statements**

This discussion and analysis are intended to serve as an introduction to the Bureau's basic financial statements. The Bureau's basic financial statements consist of three components, 1) government-wide financial statements, 2) fund financial statements, and 3) notes to the financial statements. The Bureau is considered a special purpose government rather than a general government. In addition, the Bureau engages only in governmental activities and operates only one program.

**Required Components of Annual Financial Reports**



**CABARRUS COUNTY TOURISM AUTHORITY**  
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**MANAGEMENT'S DISCUSSION AND ANALYSIS**  
*June 30, 2020*

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**Basic Financial Statements**

The first two statements (Exhibits 1 and 2) in the basic financial statements are the Government-wide Financial Statements. They provide both short and long-term information about the Bureau's financial status.

The next statements (Exhibits 3, 4 and 5) are Fund Financial Statements. These statements provide more detail than the government-wide statements.

The next section of the basic financial statements is the notes. The notes to the financial statements explain in detail some of the data contained in those statements.

**Government-wide Financial Statements**

The government-wide financial statements are designed to provide the reader with a broad overview of the Bureau's finances, similar in format to a financial statement of a private-sector business. The government-wide statements provide short and long-term information about the Bureau's financial status as a whole.

The two government-wide statements report the Bureau's Net Position and how they have changed. Net Position is the difference between the Bureau's total assets and total liabilities. Measuring Net Position is one way to gauge the Bureau's financial condition.

The government-wide statements are comprised of a single category - governmental activities. The government-wide financial statements are on Exhibits 1 and 2 of this report.

**Fund Financial Statements**

The fund financial statements provide a more detailed look at the Bureau's most significant activities. A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. The Bureau, like all governmental entities in North Carolina, uses fund accounting to ensure and reflect compliance (or non-compliance) with finance-related legal requirements, such as the General Statutes or the Bureau's budget ordinance. All of the funds of the Bureau belong in one category, governmental funds.

Governmental Funds-Governmental funds are used to account for those functions reported as governmental activities in the government-wide financial statements. The Bureau's activities are accounted for in governmental funds. These funds focus on how assets can readily be converted into cash flow in and out, and what monies are left at year-end that will be available for spending in the next year. Governmental funds are reported using the current financial resources focus and the modified accrual basis of accounting. As a result, the governmental fund financial statements give the reader a detailed short-term view that helps to determine if there are more or less financial resources available to finance the Bureau's programs.

**CABARRUS COUNTY TOURISM AUTHORITY**  
*d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU*  
**MANAGEMENT'S DISCUSSION AND ANALYSIS**  
*June 30, 2020*

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The Bureau adopts an annual budget for its General Fund, as required by the General Statutes. The budget is a legally adopted document. The budget authorizes the Bureau to obtain funds from identified sources to finance current period activities. The budgetary statement provided for the General Fund demonstrates how well the Bureau complied with the budget ordinance.

Notes to the Financial Statements – The notes provide additional information that is essential to fully understanding data provided in the government-wide and fund financial statements.

**Government-Wide Financial Analysis**

The Governmental Accounting Standards Board (GASB) Statement 34 dictated the changes you see in the Bureau's financial reports, as well as in those of many other units of government.

**Net Position**  
**Figure 1**

	<b>2020</b>	<b>2019</b>
Current and Other Assets	\$ 3,449,632	\$ 3,800,086
Capital Assets	131,005	132,791
Total Assets	3,580,637	3,932,877
Deferred outflows of resources	266,270	316,935
Net Pension Liability	464,531	406,856
Other Liabilities	115,942	144,216
Total Liabilities	580,473	551,072
Deferred inflows of resources	16,458	25,034
Net Assets		
Net investment in capital assets	131,005	132,789
Restricted for Sports Development	77,391	77,391
Restricted for Tourism Development	2,172,146	2,172,146
Unrestricted	869,434	1,291,378
Net Position	\$ 3,249,976	\$ 3,673,704

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS**  
**June 30, 2020**

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As noted earlier, Net Position may serve over time as one useful indicator of a government's financial condition. The assets of the Bureau exceeded liabilities by \$3,249,976 of June 30, 2020. The Bureau's Net Position decreased by (\$423,728) for the fiscal year ended June 30, 2020.

**Changes in Net Position**  
**Figure 2**

	<b>Governmental Activities</b>	
	<b>June 30, 2020</b>	
	<b>2020</b>	<b>2019</b>
<b>Revenues</b>		
General Revenues		
Occupancy Tax	\$ 4,133,247	\$ 5,711,875
Advertising Fees	2,662	28,567
Other Income	18,832	21,178
Earned Interest	3,490	3,560
<b>Total Revenues</b>	<b>4,158,231</b>	<b>5,765,180</b>
<b>Expenses</b>		
Economic and Physical Development	4,581,959	5,569,269
<b>Total Expenses</b>	<b>4,581,959</b>	<b>5,569,269</b>
<b>Increase (Decrease) in Net Assets</b>	<b>(423,728)</b>	<b>195,911</b>
Net Position - Beginning	3,673,704	3,477,792
Net Position - Ending	<b>\$ 3,249,976</b>	<b>\$ 3,673,704</b>

**Financial Analysis of the Bureau's Funds**

As noted earlier, the Bureau uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements.

Governmental Funds-The focus of the Bureau's governmental funds is to provide information on near-term inflows, outflows, and balances of usable resources. Such information is useful in assessing the Bureau's financing requirements. Specifically, unassigned fund balance can be a useful measure of a government's net resources available for spending at the end of the fiscal year.

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS**  
*June 30, 2020*

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The General Fund is the operating fund of the Bureau. At the end of the fiscal year, unassigned fund balance of the General Fund was \$1,164,069. The committed portion of the General Fund that relates to Sports Development at the end of fiscal year was \$77,391. The Tourism Capital Reserve fund is to fund capital projects, sales and marketing, and tourism development of the Bureau. At the end of the fiscal year, committed fund balance of the Tourism Capital Reserve Fund was \$2,172,146.

**Economic Factors for FY2020**

The following key economic indicators reflect the current state of the travel industry in Cabarrus County.

- COVID-19 has had a devastating impact on all tourism metrics including hotels, restaurants, and attractions. Travel restrictions were put in place in the middle of March and some of those restrictions are still in place as FY2021 begins.
- Great Wolf Lodge, the largest producer of Occupancy Tax in the County, shut down in March and did not open until the middle of September.
- All meetings, conventions, and youth sporting events were cancelled in March. Charlotte Motor Speedway had to cancel race events. NASCAR races that were conducted were done so without fans in the spring.
- The CVB had a reduction of \$1.7 million in Occupancy Taxes to budget from the middle of March to the end of FY2020.
- Room Demand fell by 42% from March to June compared to the same period in 2019. Some smaller limited service hotels did perform OK with construction, hospital, and transient traffic.
- Average Daily Rates fell 29% as hotels had to discount rooms in order to generate revenue.
- In the hotel sector alone Cabarrus County hotels lost \$24 million in hotel revenue and laid off 1,400 employees.

**Budget Highlights for the Fiscal Year Ending June 30, 2021**

Occupancy Taxes are expected to decrease to \$3,000,000 for FY2021. COVID-19 impacts are still ongoing and restrictions on meetings and gatherings still exist as of October 2020. Research shows that there is a desire to travel and visitors will travel to locations they feel safe. The Cabarrus County Tourism Authority is participating in Count On Me NC, a state wide initiative, to help tell visitors that Cabarrus County is a safe place to travel.

As Occupancy Taxes have been reduced, the organization has made across the board expense cuts in order to maintain Fund Balance reserve requirements. Prior to COVID-19 the organization had 21 staff members. As of October 2020, there are 11 staff members. Additional expense cuts are included in the areas of sales and marketing. Travel to trade shows has been cancelled. Advertising spending was greatly reduced since visitors did not have the ability or the desire to travel. As visitors become more comfortable with travel, spending will increase, but only at a drive market statewide level. The organization did partner with Visit NC and received a \$100,000 advertising spending credit CO-OP to advertise Cabarrus County and to highlight the safety initiatives the destination has undertaken.

*CABARRUS COUNTY TOURISM AUTHORITY  
d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU  
MANAGEMENT'S DISCUSSION AND ANALYSIS  
June 30, 2020*

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**Requests for Information**

This report is designed to provide an overview of the Bureau's finances for those with an interest in this area. Questions concerning any of the information found in this report or requests for additional information should be directed to the Finance Director, Cabarrus County Tourism Authority, 10099 Weddington Rd Ste 102, Concord, NC 28027.

# **BASIC FINANCIAL STATEMENTS**

**CABARRUS COUNTY TOURISM AUTHORITY**  
*d/b/a Cabarrus County Convention and Visitors Bureau*  
**STATEMENT OF NET POSITION**  
*June 30, 2020*

Exhibit 1

	Governmental Activities
<b>ASSETS</b>	
Current Assets:	
Cash and cash equivalents	\$ 3,302,204
Due from County	147,072
Accounts receivable - other	356
Total Current Assets	3,449,632
Capital Assets:	
Computer equipment	9,718
Vehicles	88,066
Leasehold improvements	215,791
Office equipment	75,345
Other fixed assets	7,935
	396,855
Less Accumulated Depreciation	(265,850)
Total Capital Assets, net	131,005
Total Assets	3,580,637
DEFERRED OUTFLOWS OF RESOURCES	266,270
<b>LIABILITIES</b>	
Current Liabilities:	
Accounts payable	11,182
Accrued liabilities	104,760
Total Current Liabilities	115,942
Long-term liabilities:	
Net pension liability	464,531
Total Liabilities	580,473
DEFERRED INFLOWS OF RESOURCES	16,458
<b>NET POSITION</b>	
Net investment in Capital Assets	131,005
Restricted for:	
Sports Development	77,391
Tourism Capital Reserves	2,172,146
Subsequent Year's Expenditures	869,434
Total Net Position	\$ 3,249,976

*The accompanying notes are an integral part of this statement.*

**CABARRUS COUNTY TOURISM AUTHORITY**  
*d/b/a Cabarrus County Convention and Visitors Bureau*  
**STATEMENT OF ACTIVITIES**  
*For the Year Ended June 30, 2020*

Exhibit 2

Functions/Programs	Expenses	Program Revenues		Net (Expense) Revenues and Changes in Net Position
		Program Fees	Operating Grants and Contributions	
Economic and physical development	\$ 4,581,959	12,487	4,133,247	\$ (436,225)
Total	\$ 4,581,959	\$ 12,487	\$ 4,133,247	(436,225)
	General revenues:			
				2,662
				6,345
				3,490
Change in net position				(423,728)
Net Position - beginning				3,673,704
Net Position - ending				\$ 3,249,976

*The accompanying notes are an integral part of this statement.*

**CABARRUS COUNTY TOURISM AUTHORITY**  
*d/b/a/ Cabarrus County Convention and Visitors Bureau*  
**BALANCE SHEET - GOVERNMENTAL FUND**  
*June 30, 2020*

Exhibit 3

	<u>Major Fund</u>	<u>Total Governmental Funds</u>
	<u>General Fund</u>	
<b>ASSETS</b>		
Current Assets:		
Cash and cash equivalents	\$ 3,302,204	\$ 3,302,204
Due from County	147,072	147,072
Accounts receivable - other	356	356
Total Current Assets	3,449,632	3,449,632
Total Assets	\$ 3,449,632	\$ 3,449,632
<b>LIABILITIES AND FUND BALANCE</b>		
Current Liabilities:		
Accounts payable	\$ 11,182	\$ 11,182
Accrued liabilities	24,844	24,844
Total Current Liabilities	36,026	36,026
Total Liabilities	36,026	36,026
Fund Balance:		
Committed For:		
Sports Development	77,391	77,391
Tourism Capital Reserves	2,172,146	2,172,146
Subsequent Year's Expenditures	1,164,069	1,164,069
Total Fund Balance	3,413,606	3,413,606
Total Liabilities and Fund Balance	\$ 3,449,632	\$ 3,449,632
Amounts reported for governmental activities in the statement of net position are different because:		
Ending fund balance - governmental funds		\$ 3,413,606
Capital assets are not capitalized and are expensed in the funds		131,005
Deferred outflows of resources related to pensions		266,270
Net pension liability		(464,531)
Deferred inflows of resources related to pensions		(16,458)
Liabilities for compensated absences are not reported in the funds		(79,916)
Net position of the governmental activities		\$ 3,249,976

*The accompanying notes are an integral part of this statement.*

**CABARRUS COUNTY TOURISM AUTHORITY**  
*d/b/a Cabarrus County Convention and Visitors Bureau*  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE**  
*For the Year Ended June 30, 2020*

Exhibit 4

	<u>Major Fund</u>	Total
	General Fund	Governmental Funds
Revenues:		
Occupancy tax revenue	\$ 4,133,247	\$ 4,133,247
Advertising fees	2,662	2,662
Items for resale	12,487	12,487
Miscellaneous revenues	6,345	6,345
Interest on investments	3,490	3,490
	<u>4,158,231</u>	<u>4,158,231</u>
Expenditures:		
Current:		
Economic and physical development	4,457,458	4,457,458
	<u>(299,227)</u>	<u>(299,227)</u>
Other Financing Sources (Uses)		
Transfer from (to) other funds	-	-
Total other financing sources (uses)	<u>-</u>	<u>-</u>
Fund balance, beginning of year	3,712,833	3,712,833
Fund balance, end of year	<u>\$ 3,413,606</u>	<u>\$ 3,413,606</u>

*The accompanying notes are an integral part of this statement.*

**CABARRUS COUNTY TOURISM AUTHORITY**  
*d/b/a Cabarrus County Convention and Visitors Bureau*  
**RECONCILIATION OF THE STATEMENT OF ACTIVITIES TO THE**  
**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE -**  
**GOVERNMENTAL FUND**  
*For the Year Ended June 30, 2020*

Amounts reported for governmental activities in the statement of activities are different because:

Net changes in fund balances - total governmental funds	\$(299,227)
Governmental funds report capital outlay as expenditures. However, in the Statement of Activities the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense. This is the amount by which depreciation exceeded capital outlay in the current period.	(1,153)
Loss on disposal of capital asset	(631)
Contributions to the pension plan in the current fiscal year are not included on the Statement of Activities	99,637
Some expenses reported in the statement of activities do not require the use of current financial resources and, therefore, are not reported as expenditures in governmental funds.	
Pension expense	(199,399)
Compensated absences	<u>(22,955)</u>
Total changes in net position of governmental activities	<u><u>\$(423,728)</u></u>

*The accompanying notes are an integral part of this statement.*

**CABARRUS COUNTY TOURISM AUTHORITY**

Exhibit 6

*d/b/a Cabarrus County Convention and Visitors Bureau*

**STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCE -  
BUDGET AND ACTUAL - GENERAL FUND**

*For the Year Ended June 30, 2020*

	<u>Original Budget</u>	<u>Final Budget</u>	<u>Actual</u>	<u>Variances Positive (Negative)</u>
<b>Revenues:</b>				
Occupancy tax	\$ 5,838,057	\$ 5,838,057	\$ 4,133,247	\$ (1,704,810)
Advertising revenues	40,000	40,000	2,662	(37,338)
Items for resale	9,850	9,850	12,487	2,637
Miscellaneous revenue	3,500	3,500	6,345	2,845
Interest on investments	3,600	3,600	3,490	(110)
Fund balance appropriated	-	22,861	-	(22,861)
<b>Total revenues</b>	<u>5,895,007</u>	<u>5,917,868</u>	<u>4,158,231</u>	<u>(1,759,637)</u>
<b>Expenditures:</b>				
<b>Economic and physical development:</b>				
Salaries and employee benefits	1,679,323	1,692,384	1,495,141	197,243
Administration	666,681	676,481	571,332	105,149
Advertising	1,358,570	1,358,570	998,572	359,998
Events	192,100	192,100	98,447	93,653
Agreements	1,003,047	1,003,047	676,457	326,590
Sales and marketing	995,286	995,286	617,509	377,777
<b>Total expenditures</b>	<u>5,895,007</u>	<u>5,917,868</u>	<u>4,457,458</u>	<u>1,460,410</u>
Revenues over (under) expenditures	<u>-</u>	<u>-</u>	<u>(299,227)</u>	<u>(299,227)</u>
<b>Other Financing Sources (Uses)</b>				
Transfer from (to) other funds	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total other financing sources (uses)	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Expenditures and other uses over revenues and other sources	<u>\$ -</u>	<u>\$ -</u>	<u>(299,227)</u>	<u>\$ (299,227)</u>
Fund balance, beginning of year			<u>3,712,833</u>	
Fund balance, end of year			<u>\$ 3,413,606</u>	

*The accompanying notes are an integral part of this statement.*

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO THE FINANCIAL STATEMENT**  
**For the year ended June 30, 2020**

**NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

The accounting policies of the Cabarrus County Tourism Authority d/b/a/ Cabarrus County Convention and Visitors Bureau conform to generally accepted accounting principles as applicable to government entities. The following is a summary of the more significant accounting policies:

**A. Reporting Entity**

The Cabarrus County Tourism Authority d/b/a Cabarrus County Convention and Visitors Bureau (the "Bureau") was chartered as the Tourism Development Authority for Cabarrus County by S.L. 1989-658/House Bill 813 of the 1989 session laws of the North Carolina General Assembly, effective July 19, 1989. The purpose of the Bureau is to promote travel and tourism in Cabarrus County. The Bureau's Board is composed of 12 members. The Cabarrus County Commissioners appoint 3 members to the Bureau's Board. The Cabarrus Regional Chamber of Commerce appoints 3 members to the Bureau's Board. The Bureau appoints the final 6 members to the Board. The budget of the Bureau is approved by the Board of the Bureau, and the Cabarrus County Commissioners concur with the budget. The Bureau is funded through the local hotel occupancy tax.

**B. Basis of Presentation**

*Government-Wide Statements:* The statement of net position and the statement of activities display information about the governmental entity. These statements include the financial activities of the overall governmental entity.

The statement of activities presents a comparison between direct expenses and program revenues for each function of the Bureau's governmental activities. Direct expenses are those that are specifically associated with a program or function and, therefore, are clearly identifiable to a particular function. Indirect expense allocations that have been made in the funds have been reversed for the statement of activities. Program revenues include fees and charges paid by the recipients of goods or services offered by the programs. Revenues that are not classified as program revenues are presented as general revenues.

*Fund Financial Statements:* The fund financial statements provide information about the Bureau's funds. The emphasis of fund financial statements is on major governmental funds, each displayed in a separate column.

The Bureau has the following major governmental fund:

**General Fund** – The General Fund is the general operating fund of the Bureau. Additionally, the Bureau has legally adopted a Tourism Capital Reserve Fund. Under GASB 54 guidance the Tourism Capital Reserve Fund is consolidated with the General Fund. The budgetary comparison for the Tourism Capital Reserve Fund has been consolidated with the General Fund.

*-Continued-*

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (cont'd)**

**C. Measurement Focus and Basis of Accounting**

*Government-Wide Financial Statements.* The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded at the time liabilities are incurred, regardless of when the related cash flows take place.

*Governmental Fund Financial Statements.* Governmental funds are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Under this method, revenues are recognized when measurable and available. Expenditures are recorded when the related fund liability is incurred.

The Bureau recognizes assets of non-exchange transactions in the period when the underlying transaction occurs, when an enforceable legal claim has arisen, or when all eligibility requirements are met. Revenues are recognized on the modified accrual basis of accounting when they are measurable and available. Non-exchange transactions occur when a government provides (or receives) value to (or from) another party without receiving (or giving) equal or nearly equal value in return. The Bureau considers all revenues available if they are collected within 60 days after year end.

The Bureau has implemented Governmental Accounting Standards Board (GASB) Statement Number 34, *Basic Financial Statements – and Management's Discussion and Analysis – for State and Local Governments*, and related standards. These new standards provide for significant changes in terminology and presentation and for the inclusion of Management's Discussion and Analysis as required supplementary information.

**D. Budgetary Data**

Budget

Budgets are adopted as required by North Carolina General Statutes. An annual budget ordinance is adopted for the General Fund. All annual appropriations lapse at fiscal year end. The budget is prepared using the modified accrual basis of accounting. Expenditures may not legally exceed appropriations at the departmental level for all annually budgeted funds. Any revisions that alter total expenditures of any fund must be approved by the governing board. During the year, several amendments to the original budget were necessary. The budget ordinance must be adopted by July 1 of the fiscal year or the governing board must adopt an interim budget that covers that time until the annual ordinance can be adopted.

**E. Assets, Liabilities and Fund Equity**

1. Deposits and Investments

All deposits of the Bureau are made in Board-designated official depositories and are secured as required by G.S. 159-31. The Bureau may designate as an official depository any bank or savings association whose principal office is located in North

-Continued-

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (cont'd)**

*Assets, Liabilities and Fund Equity (cont'd)*

Carolina. Also, the Bureau may establish time deposit accounts such as money market accounts, and certificates of deposit.

2. Cash and Cash Equivalents

All bank deposits are essentially demand deposits and are considered cash and cash equivalents.

3. Accounts Receivable

Accounts receivable are stated at the amount management expects to collect from outstanding balances. No provision for bad debt is included in these financial statements because the Bureau considers all accounts receivable to be collectible at June 30, 2020.

4. Capital Assets

All acquisitions of capital assets and all expenditures for repairs, maintenance, renewals and betterments that materially prolong the useful lives of assets are capitalized. Maintenance and repairs that do not improve or extend the useful lives of the respective assets are expensed currently. Capital assets are carried at cost. Donations of capital assets are recorded as support at their estimated fair value as established by the donor. Depreciation is computed using the straight-line method as follows:

Computer Equipment	5 years
Vehicles	5 years
Leasehold Improvements	15 years
Office Equipment	5 years
Other fixed assets	5 years

5. Deferred outflows/inflows of resources

In addition to assets, the statement of financial position will sometimes report a separate section for deferred outflows of resources. This separate financial statement element, *Deferred Outflows of Resources*, represents a consumption of net position that applies to a future period and so will not be recognized as an expense or expenditure until then. The Bureau has one item that meets this criterion, contributions made to the pension plan in the 2020 fiscal year. In addition to liabilities, the statement of financial position will sometimes report a separate section for deferred inflows of resources. This separate financial statement element, *Deferred Inflows of Resources*, represents an acquisition of net position that applies to a future period and so will not be recognized as revenue until then. The Bureau has one item

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (cont'd)**

*Assets, Liabilities and Fund Equity (cont'd)*

that meets the criterion for this category, deferrals of pension expense that result from the implementation of GASB Statement 68.

6. Compensated Absences

The paid time off (PTO) policy of the Bureau provides for the accumulation of up to 240 hours earned leave with such leave being fully vested when earned. For the Bureau's government-wide fund, an expense and a liability for compensated absences and the salary-related payments are recorded as the leave is earned. The Bureau has assumed a last-in, first-out method of using accumulated compensation time. The portion of that time that is estimated to be used in the next fiscal year has been designated as a current liability in the government-wide financial statements.

7. Net Position/Fund Balances

Net Position

Net position in the government-wide financial statements is classified as net investments in capital assets, restricted and unrestricted. Restricted net position represent constraints on resources that are either externally imposed by creditors, grantors, contributors, or the laws or regulations of other governments or imposed by law through state statute.

Fund Balances

In the governmental fund financial statements, fund balance is composed of five classifications designed to disclose the hierarchy of constraints placed on how fund balance can be spent.

The governmental fund type classifies fund balances as follows:

Non-spendable Fund Balance – This classification includes amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.

Restricted Fund Balance – This classification includes amounts that are restricted to specific purposes externally imposed by creditors or imposed by law.

Committed Fund Balance – Portion of fund balance that can only be used for specific purposes imposed by majority vote by quorum of the Bureau's governing body (highest level of decision-making authority). Any changes or removal of specific purpose requires majority action by the governing body.

Assigned Fund Balance – Portion of fund balance that the Bureau intends to use for specific purposes.

*-Continued-*

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (cont'd)**

***Assets, Liabilities and Fund Equity (cont'd)***

Unassigned Fund Balance – Portion of fund balance that has not been restricted, committed, or assigned to specific purposes or other funds.

**8. Pensions**

For purposes of measuring the net pension asset, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Local Governmental Employees' Retirement System (LGERS) and additions to/deductions from LGERS' fiduciary net position have been determined on the same basis as they are reported by LGERS. For this purpose, plan member contributions are recognized in the period in which the contributions are due. The Bureau's employer contributions are recognized when due and the Bureau has a legal requirement to provide the contributions. Benefits and refunds are recognized when due and payable in accordance with the terms of LGERS. Investments are reported at fair value.

**Income Tax Status**

Cabarrus County Tourism Authority is recognized as a Bureau exempt from federal income tax and not subject to private foundation status under Section 501(c)(6) of the Internal Revenue Code.

The Authority has adopted ASC 740-10, effective for audit years ending after December 15, 2009, as it relates to uncertain tax positions for the year ended June 30, 2020 and has evaluated its tax positions for all open tax years. The Bureau is not currently under audit nor has the Bureau been contacted by the Internal Revenue Service.

Based on the evaluation of the Bureau's tax positions, management believes all positions taken would be upheld under an examination. Therefore, no provision for the effects of uncertain tax positions have been recorded for the year ended June 30, 2020.

**F. *Estimates***

Management uses estimates and assumptions in preparing financial statements. Those estimates and assumptions affect reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and reported revenues and expenses. Actual results could differ from those estimates.

**G. *Subsequent Events***

Management has evaluated subsequent events through November 13, 2020, the date the financial statements were available to be issued.

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 2 - DETAIL NOTES ON ALL FUNDS AND ACCOUNT GROUPS**

**A. Deposits**

All the deposits of the Bureau are either insured or collateralized. All deposits that exceed the Federal Depository Insurance coverage level are collateralized with securities held by the Bureau's agents in these units' names.

At June 30, 2020, the Bureau's deposits had a carrying amount of \$3,302,204, and a bank balance of \$3,313,182. Of the bank balance, \$250,000 was covered by federal depository insurance for each of the two banks, and \$2,813,182 was covered by collateral.

**B. Due from County**

Due from County consisted primarily of the occupancy tax payment of \$147,072 that was due from Cabarrus County at June 30, 2020.

**C. Capital Assets**

The following is a summary of changes in capital assets during the fiscal year:

	Balance July 1, 2019	Increases	Decreases	Balance June 30, 2020
Capital assets being depreciated:				
Computer equipment	\$ 73,961	\$ 9,718	\$ (73,961)	\$ 9,718
Vehicles	88,066	-	-	88,066
Leasehold improvements	205,790	10,000	-	215,790
Office equipment	75,345	-	-	75,345
Other fixed assets	7,935	-	-	7,935
Total capital assets being depreciated	<u>451,097</u>	<u>19,718</u>	<u>(73,961)</u>	<u>396,854</u>
Less accumulated depreciation for:				
Computer equipment	73,014	1,935	(73,330)	1,619
Vehicles	65,877	4,671	-	70,548
Leasehold improvements	96,626	13,775	-	110,401
Office equipment	74,856	490	-	75,346
Other fixed assets	7,935	-	-	7,935
Total accumulated depreciated	<u>318,308</u>	<u>\$ 20,871</u>	<u>\$ (73,330)</u>	<u>265,849</u>
Total capital assets being depreciated, net	<u>\$ 132,789</u>			<u>\$ 131,005</u>

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**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 2 - DETAIL NOTE ON ALL FUNDS AND ACCOUNT GROUPS (cont'd)**

**D. Liabilities**

Risk Management

The Bureau is exposed to various risks of loss related to torts, theft of assets, errors and omissions, and natural disasters. The Finance Director of the Bureau is bonded by a public official's bond in the amount of \$50,000.

The Bureau's insurance policy is administered by Trey Siner Insurance Group. Through this policy, the Bureau has workers' compensation coverage up to statutory limits and employers' liability coverage up to \$1,000,000. The Bureau also participates in an insurance policy for General Liability coverage up to \$1,000,000 and Directors and Officers liability coverage up to \$1,000,000.

The Bureau has not acquired flood insurance.

Changes in Long-Term Liabilities as follows:

	Balance July 1, 2019	Increases	Decreases	Balance June 30, 2020	Current Portion of Balance
Governmental activities:					
Compensated absences	\$ 56,961	\$ 22,955	\$ -	\$ 79,916	\$ 79,916
Governmental activities long-term liabilities	\$ 56,961	\$ 22,955	\$ -	\$ 79,916	\$ 79,916

**E. Occupancy Taxes**

Cabarrus County, in accordance with state law (S.L. 1999-112), transfers the proceeds of a room occupancy tax gross receipts derived from the rental of any room, lodging, or accommodation furnished by a hotel, motel, inn, tourist camp, or similar place within the County that is subject to sales tax imposed by the state under G.S. 105-164.4(a)(3). This tax is in addition to any state or local sales tax. This tax does not apply to accommodations furnished by nonprofit, charitable, educational, or religious Bureaus. The occupancy tax transferred from Cabarrus County represents 99% of total revenues and other financing sources of the Bureau.

**NOTE 3 - RELATED PARTY TRANSACTIONS**

A board member, Tim Hagler, is Vice President of Community Relations for Charlotte Motor Speedway. The Bureau paid Charlotte Motor Speedway \$353,694 during the year ended June 30, 2020, under a marketing agreement and event sponsorship.

A board member, Angela Brown, is the General Manager of Great Wolf Lodge. The Bureau paid Great Wolf Lodge \$10,286 during the year ended June 30, 2020, for sponsorship of group meetings throughout the year.

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**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 3 - RELATED PARTY TRANSACTIONS (cont'd)**

A board member, Eric Habschied, is the Director of Sales and Marketing of Embassy Suites. The Bureau paid Embassy Suites \$30,117 during the year ended June 30, 2020, for sponsorship of group meetings throughout the year.

**NOTE 4- RETIREMENT PLAN**

A. Local Governmental Employees' Retirement System

*Plan Description.* The Bureau is a participating employer in the statewide Local Governmental Employees' Retirement System (LGERS), a cost-sharing multiple-employer defined benefit pension plan administered by the State of North Carolina. LGERS membership is comprised of general employees and local law enforcement officers (LEOs) of participating local governmental entities. Article 3 of G.S. Chapter 128 assigns the authority to establish and amend benefit provisions to the North Carolina General Assembly. Management of the plan is vested in the LGERS Board of Trustees, which consists of 13 members – nine appointed by the Governor, one appointed by the state Senate, one appointed by the state House of Representatives, and the State Treasurer and State Superintendent, who serve as ex-officio members. The Local Governmental Employees' Retirement System is included in the Comprehensive Annual Financial Report (CAFR) for the State of North Carolina. The State's CAFR includes financial statements and required supplementary information for LGERS. That report may be obtained by writing to the Office of the State Controller, 1410 Mail Service Center, Raleigh, North Carolina 27699-1410, by calling (919) 981-5454, or at [www.osc.nc.gov](http://www.osc.nc.gov).

*Benefits Provided.* LGERS provides retirement and survivor benefits. Retirement benefits are determined as 1.85% of the member's average final compensation times the member's years of creditable service. A member's average final compensation is calculated as the average of a member's four highest consecutive years of compensation. Plan members are eligible to retire with full retirement benefits at age 65 with five years of creditable service, at age 60 with 25 years of creditable service, or at any age with 30 years of creditable service. Plan members are eligible to retire with partial retirement benefits at age 50 with 20 years of creditable service or at age 60 with five years of creditable service (age 55 for firefighters). Survivor benefits are available to eligible beneficiaries of members who die while in active service or within 180 days of their last day of service and who have either completed 20 years of creditable service regardless of age (15 years of creditable service for firefighters and rescue squad members who are killed in the line of duty) or have completed five years of service and have reached age 60.

Eligible beneficiaries may elect to receive a monthly Survivor's Alternate Benefit for life or a return of the member's contributions. The plan does not provide for automatic post-retirement benefit increases. Increases are contingent upon actuarial gains of the plan.

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**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 4- RETIREMENT PLAN (cont'd)**

LGERS plan members who are LEOs are eligible to retire with full retirement benefits at age 55 with five years of creditable service as an officer, or at any age with 30 years of creditable service. LEO plan members are eligible to retire with partial retirement benefits at age 50 with 15 years of creditable service as an officer. Survivor benefits are available to eligible beneficiaries of LEO members who die while in active service or within 180 days of their last day of service and who also have either completed 20 years of creditable service regardless of age, or have completed 15 years of service as a LEO and have reached age 50, or have completed five years of creditable service as a LEO and have reached age 55, or have completed 15 years of creditable service as a LEO if killed in the line of duty. Eligible beneficiaries may elect to receive a monthly Survivor's Alternate Benefit for life or a return of the member's contributions.

*Contributions.* Contribution provisions are established by General Statute 128-30 and may be amended only by the North Carolina General Assembly. Bureau employees are required to contribute 6% of their compensation. Employer contributions are actuarially determined and set annually by the LGERS Board of Trustees. The Bureau's contractually required contribution rate for the year ended June 30, 2020, was 9.62%, actuarially determined as an amount that, when combined with employee contributions, is expected to finance the costs of benefits earned by employees during the year. Contributions to the pension plan from the Bureau were \$99,637 for the year ended June 30, 2020.

*Refunds of Contributions* – Bureau employees who have terminated service as a contributing member of LGERS, may file an application for a refund of their contributions. By state law, refunds to members with at least five years of service include 4% interest. State law requires a 60 day waiting period after service termination before the refund may be paid. The acceptance of a refund payment cancels the individual's right to employer contributions or any other benefit provided by LGERS.

*Pension Liabilities, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions*

At June 30, 2020, the Bureau reported a liability of \$464,531 for their proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2019. The total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of December 31, 2018. The total pension liability was then rolled forward to the measurement date of June 30, 2019 utilizing update procedures incorporating the actuarial assumptions. The Bureau's proportion of the net pension liability was based on a projection of the Bureau's long-term share of future payroll covered by the pension plan, relative to the projected future payroll covered by the pension plan of all participating LGERS employers, actuarially determined. At June 30, 2019, the Bureau's proportion was 0.01701%, which was a decrease of .00014% from their proportion measured as of June 30, 2018.

-Continued-

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 4- RETIREMENT PLAN (cont'd)**

For the year ended June 30, 2020, the Bureau recognized pension expense of \$199,399. At June 30, 2020, the Bureau reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ 79,539	\$ -
Changes of assumptions	75,711	-
Net difference between projected and actual earnings on pension plan investments	11,330	-
Changes in proportion and differences between Bureau contributions and proportionate share of contributions	54	16,458
Bureau contributions subsequent to the Measurement date	99,637	-
Total	\$ <u>266,271</u>	\$ <u>16,458</u>

\$99,637 reported as deferred outflows of resources related to pensions resulting from Bureau contributions subsequent to the measurement date will be recognized as a decrease of the net pension liability in the year ending June 30, 2021. Other amounts reported as deferred inflows of resources related to pensions will be recognized in pension expense as follows:

Year Ended June 30:	
2021	\$ 76,130
2022	18,730
2023	42,764
2024	12,551
2025	-
Thereafter	-

Actuarial Assumptions. The total pension liability in the December 31, 2018 actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	3.0 percent
Salary increases including inflation and productivity factor	3.50 to 8.10 percent
Investment rate of return, net of pension plan investment expense, including inflation	7.00 percent

-Continued-

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 4- RETIREMENT PLAN (cont'd)**

The plan currently uses mortality tables that vary by age, gender, employee group (i.e. general, law enforcement officer) and health status (i.e. disabled and healthy). The current mortality rates are based on published tables and based on studies that cover significant portions of the U.S. population. The healthy mortality rates also contain a provision to reflect future mortality improvements.

The actuarial assumptions used in the December 31, 2018 valuation were based on the results of an actuarial experience study for the period January 1, 2010 through December 31, 2014.

Future ad hoc COLA amounts are not considered to be substantively automatic and are therefore not included in the measurement.

The projected long-term investment returns and inflation assumptions are developed through review of current and historical capital markets data, sell-side investment research, consultant whitepapers, and historical performance of investment strategies. Fixed income return projections reflect current yields across the U.S. Treasury yield curve and market expectations of forward yields projected and interpolated for multiple tenors and over multiple year horizons. Global public equity return projections are established through analysis of the equity risk premium and the fixed income return projections. Other asset categories and strategies' return projections reflect the foregoing and historical data analysis. These projections are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation. The target allocation and best estimates of arithmetic real rates of return for each major asset class as of June 30, 2018 are summarized in the following table:

	Target Allocation	Long-term Expected Real Rate of Return
Fixed Income	29.0%	1.4%
Global Equity	42.0%	5.3%
Real Estate	8.0%	4.3%
Alternatives	8.0%	8.9%
Credit	7.0%	6.0%
Inflation Protection	6.0%	4.0%
	<u>100.0%</u>	

The information above is based on 30 year expectations developed with the consulting actuary for the 2018 asset / liability and investment policy study for the North Carolina Retirement Systems, including LGERS. The long-term nominal rates of return underlying the real rates of return are arithmetic annualized figures. The real rates of return are calculated from nominal rates by multiplicatively subtracting a long-term inflation assumption of 3.05%. All rates of return and inflation are annualized.

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**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 4- RETIREMENT PLAN (cont'd)**

*Discount rate.* The discount rate used to measure the total pension liability was 7.00%. The projection of cash flows used to determine the discount rate assumed that contributions from plan members will be made at the current contribution rate and that contributions from employers will be made at statutorily required rates, actuarially determined. Based on these assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of the current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

*Sensitivity of the Bureau's proportionate share of the net pension liability to changes in the discount rate.* The following presents the Bureau's proportionate share of the net pension liability calculated using the discount rate of 7.00 percent, as well as what the Bureau's proportionate share of the net pension asset or net pension liability would be if it were calculated using a discount rate that is one percentage point lower (6.00 percent) or one percentage point higher (8.00 percent) than the current rate:

	1% Decrease (6.00%)	Discount Rate (7.00%)	1% Increase (8.00%)
Bureau's proportionate share of the net pension liability (asset)	\$ 1,062,465	\$ 464,531	\$ (32,475)

*Pension plan fiduciary net position.* Detailed information about the pension plan's fiduciary net position is available in the separately issued Comprehensive Annual Financial Report (CAFR) for the State of North Carolina.

A. NC401(k) Annuity Program

The Bureau also offers a NC401(k) tax deferred annuity program. Eligible employees can contribute to the plan from their salary. The Bureau currently contributes 5% of the employees' salary. The amount paid to the retirement program by the Bureau during the year ended June 30, 2020 was \$53,848.

**NOTE 5 - JOINT VENTURE**

The Bureau takes part in a joint venture in conjunction with Cabarrus County. The Bureau receives 90% of room occupancy taxes, which are levied and collected by the County. For the year ended June 30, 2020, occupancy taxes totaling \$3,719,923 were received from the County.

**NOTE 6 - LEASES**

The Bureau leases its office space, computers, servers, a vehicle and a copier under operating leases. Lease expense for the year ended June 30, 2020 was \$188,140.

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**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a CABARRUS COUNTY CONVENTION AND VISITORS BUREAU**  
**NOTES TO FINANCIAL STATEMENTS**  
**For the Year Ended June 30, 2020**

**NOTE 5 - LEASES (cont'd)**

Future minimum lease payments under the operating leases for office space and equipment as of June 30, 2020 are as follows:

<u>Years ending June 30,</u>	
2021	\$ 191,372
2022	163,421
2023	155,933
2024	150,413
2025	100,275
Thereafter	<u>-</u>
	<u>\$ 761,414</u>

**NOTE 6 - CONTINGENCY**

On January 30, 2020, the World Health Organization (“WHO”) announced a global health emergency because of a new strain of coronavirus originating in Wuhan, China (the “COVID-19 outbreak”) and the risks to the international community as the virus spreads globally beyond its point of origin. In March 2020, the WHO classified the COVID-19 outbreak as a pandemic, based on the rapid increase in exposure globally. The full impact of the COVID-19 outbreak continues to evolve as of the date of this report.

The Bureau’s operations are heavily dependent on the local county’s occupancy taxes. The outbreak may have a continued material adverse impact on economic and market conditions, triggering a period of global economic slowdown. This situation is expected to depress the occupancy taxes in which the Bureau receives revenue during fiscal year 2021. Management is actively monitoring the global situation on its financial condition, liquidity, operations, suppliers, industry, and workforce. Given the daily evolution of the COVID-19 outbreak and the global responses to curb its spread, the Bureau is not able to estimate the effects of the COVID-19 outbreak on its results of operations, financial condition, or liquidity for fiscal year 2021.

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**CABARRUS COUNTY TOURISM AUTHORITY**  
*d/b/a Cabarrus County Convention And Visitors Bureau*  
**SCHEDULE OF BUREAU CONTRIBUTIONS**  
**LOCAL GOVERNMENT EMPLOYEES' RETIREMENT SYSTEM**  
**LAST SEVEN FISCAL YEARS**

	<u>2020</u>	<u>2019</u>	<u>2018</u>	<u>2017</u>	<u>2016</u>	<u>2015</u>	<u>2014</u>
Contractually required contribution	\$ 99,637	\$ 90,238	\$ 81,980	\$ 79,765	\$ 72,368	\$ 72,393	\$ 68,376
Contributions in relation to the contractually required contribution	<u>99,637</u>	<u>90,238</u>	<u>81,980</u>	<u>79,765</u>	<u>72,368</u>	<u>72,383</u>	<u>68,376</u>
Contribution deficiency (excess)	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>
Bureau's covered-employee payroll	<u>\$ 1,035,728</u>	<u>\$ 1,071,710</u>	<u>\$ 1,003,427</u>	<u>\$ 1,007,134</u>	<u>\$ 985,940</u>	<u>\$ 935,181</u>	<u>\$ 883,411</u>
Contributions as a percentage of covered-employee payroll	9.62%	8.42%	8.17%	7.92%	7.34%	7.74%	7.74%

*The accompanying notes are an integral part of this statement.*

**CABARRUS COUNTY TOURISM AUTHORITY**  
**d/b/a Cabarrus County Convention And Visitors Bureau**  
**SCHEDULES OF REQUIRED SUPPLEMENTARY INFORMATION**  
**SCHEDULE OF THE BUREAU'S PROPORTIONATE SHARE OF THE NET PENSION LIABILITY**  
**LOCAL GOVERNMENT EMPLOYEES' RETIREMENT SYSTEM**  
**LAST SEVEN FISCAL YEARS**

	<u>2020</u>	<u>2019</u>	<u>2018</u>	<u>2017</u>	<u>2016</u>	<u>2015</u>	<u>2014</u>
Bureau's proportion of the net pension liability (asset)	0.01701%	0.01715%	0.01801%	0.02050%	0.01870%	0.01898%	0.01700%
Bureau's proportionate share of the net pension liability (asset)	\$ <u>464,531</u>	\$ <u>406,856</u>	\$ <u>275,143</u>	\$ <u>435,078</u>	\$ <u>83,700</u>	\$ <u>(111,934)</u>	\$ <u>204,915</u>
Bureau's covered-employee payroll	\$ <u>1,071,710</u>	\$ <u>1,003,427</u>	\$ <u>1,007,134</u>	\$ <u>985,940</u>	\$ <u>935,181</u>	\$ <u>883,411</u>	\$ <u>844,141</u>
Bureau's proportionate share of the net pension liability (asset) as a percentage of its covered- employee payroll	43.34%	40.55%	27.32%	44.13%	8.95%	-12.67%	24.27%
Plan fiduciary net position as a percentage of the total pension liability	90.86%	91.63%	94.18%	91.47%	98.09%	102.64%	94.35%

\*The amounts presented for each fiscal year were determined as of the prior fiscal year ending June 30

*The accompanying notes are an integral part of this statement.*

EXTENDED TO MAY 17, 2021

**990**  
Form (Rev. January 2020)  
Department of the Treasury  
Internal Revenue Service

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)  
Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047  
**2019**  
Open to Public Inspection

**A** For the 2019 calendar year, or tax year beginning **JUL 1, 2019** and ending **JUN 30, 2020**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>CABARRUS COUNTY TOURISM AUTHORITY</b>		<b>D</b> Employer identification number <b>26-2726341</b>
	Doing business as <b>CABARRUS COUNTY CONVENTION AND V</b>		<b>E</b> Telephone number <b>(800)848-3740</b>
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	<b>G</b> Gross receipts \$ <b>4,158,231.</b>
	<b>10099 WEDDINGTON RD</b>	<b>102</b>	
City or town, state or province, country, and ZIP or foreign postal code <b>CONCORD, NC 28027</b>		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>F</b> Name and address of principal officer: <b>7JOHN MILLS</b> <b>10099 WEDDINGTON RD, CONCORD, NC 28027</b>		<b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>I</b> Tax-exempt status: <input type="checkbox"/> 501(c)(3) <input checked="" type="checkbox"/> 501(c)( 6 ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(c)</b> Group exemption number ▶	
<b>J</b> Website: <b>WWW.CABARRUSCVB.COM</b>		<b>L</b> Year of formation: <b>2008</b> <b>M</b> State of legal domicile: <b>NC</b>	
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶			

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>DRIVE VISITATION TO CABARRUS COUNTY TO GENERATE THE MAXIMUM IMPACT THROUGH HOTEL STAYS AND</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>12</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>12</b>
	<b>5</b> Total number of individuals employed in calendar year 2019 (Part V, line 2a)	<b>5</b>	<b>26</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>20</b>
	<b>7 a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, line 39	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>0.</b>	<b>0.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>5,758,387.</b>	<b>4,148,396.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>8,560.</b>	<b>2,859.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>3,234.</b>	<b>6,345.</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>5,770,181.</b>	<b>4,157,600.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>0.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>0.</b>	<b>0.</b>
	<b>16 a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>1,548,652.</b>	<b>1,613,191.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25)	<b>0.</b>	<b>0.</b>
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>4,025,617.</b>	<b>2,968,137.</b>
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>5,574,269.</b>	<b>4,581,328.</b>
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>195,912.</b>	<b>-423,728.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>4,249,810.</b>	<b>3,846,907.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>576,106.</b>	<b>596,931.</b>
		<b>3,673,704.</b>	<b>3,249,976.</b>

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer	Date			
	<b>7JOHN MILLS, EXECUTIVE VICE PRESIDENT</b> Type or print name and title				
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>DANIEL O. MORROW, CPA</b>	Preparer's signature 	Date <b>12/11/20</b>	Check <input type="checkbox"/> self-employed	PTIN <b>P01353124</b>
	Firm's name ▶ <b>POTTER &amp; COMPANY, P.A.</b>	Firm's EIN ▶ <b>56-1220683</b>			
	Firm's address ▶ <b>434 COPPERFIELD BLVD NE STE A CONCORD, NC 28025</b>	Phone no. <b>704-786-8189</b>			

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [ ]

1 Briefly describe the organization's mission:
DRIVE VISITATION TO CABARRUS COUNTY TO GENERATE THE MAXIMUM IMPACT THROUGH HOTEL STAYS AND VISITOR SPENDING.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 3,894,129. including grants of \$ ) (Revenue \$ )
DRIVE VISITATION TO CABARRUS COUNTY TO GENERATE THE MAXIMUM IMPACT THROUGH HOTEL STAYS AND VISITOR SPENDING.

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 3,894,129.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>		X
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ?		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		X
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	X	
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J	X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II		X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions, for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV		X
b A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV		X
c A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? If "Yes," complete Schedule L, Part IV	X	
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?	X	

Note: All Form 990 filers are required to complete Schedule O

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response or note to any line in this Part V

	Yes	No
1a Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
b Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	

**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
	2a	26	
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note:</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	2b	X
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	3b	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	X
b	If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9	<b>Sponsoring organizations maintaining donor advised funds.</b>		
a	Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10	<b>Section 501(c)(7) organizations.</b> Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	<b>Section 501(c)(12) organizations.</b> Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
a	Is the organization licensed to issue qualified health plans in more than one state? <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b	
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.	15	X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	X

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI [X]

Section A. Governing Body and Management

Table with 4 columns: Question, Line Number, Yes, No. Rows include questions about voting members, family/business relationships, management delegation, significant changes, asset diversions, members/stockholders, governance decisions, meeting documentation, and officer reachability.

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 4 columns: Question, Line Number, Yes, No. Rows include questions about local chapters, written policies, Form 990 distribution, conflict of interest policies, whistleblower policies, document retention, compensation review, joint ventures, and participation in joint ventures.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed NONE
18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
  - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
  - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
  - List all of the organization's **former** directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) TIM HAGLER CHAIRMAN	1.00	X		X				0.	0.	0.
(2) OWEN PARKER TREASURER	1.00	X		X				0.	0.	0.
(3) ANGIE BROWN SECRETARY	1.00	X		X				0.	0.	0.
(4) PAM DUBOIS BOARD MEMBER	1.00	X						0.	0.	0.
(5) TERRY CRAWFORD BOARD MEMBER	1.00	X						0.	0.	0.
(6) TAMMY TREXLER WHALEY BOARD MEMBER	1.00	X						0.	0.	0.
(7) STEVE STEINBACHER BOARD MEMBER	1.00	X						0.	0.	0.
(8) PAT HORTON BOARD MEMBER	1.00	X						0.	0.	0.
(9) DIANE HONEYCUTT BOARD MEMBER	1.00	X						0.	0.	0.
(10) ERIC HABSCHIED BOARD MEMBER	1.00	X						0.	0.	0.
(11) PRITESH NAGARJI BOARD MEMBER	1.00	X						0.	0.	0.
(12) JAY WHITE BOARD MEMBER	1.00	X						0.	0.	0.
(13) JOHN MILLS EXECUTIVE VICE PRESIDENT	40.00					X		112,041.	0.	16,503.
(14) MICHAEL BONOFFSKI SENIOR VP OF MARKETING AND	40.00					X		109,799.	0.	16,068.
(15) JOHN POOLE SENIOR VP OF SALES AND SER	40.00					X		103,094.	0.	15,287.
(16) DONNA CARPENTER PRESIDENT/CEO	40.00					X		151,520.	0.	19,646.



**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a	Federated campaigns	1a			
	b	Membership dues	1b			
	c	Fundraising events	1c			
	d	Related organizations	1d			
	e	Government grants (contributions)	1e			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f			
	g	Noncash contributions included in lines 1a-1f	1g \$			
	h	Total. Add lines 1a-1f				
	Program Service Revenue	2 a	OCCUPANCY TAX	Business Code 900099	4,133,247.	4,133,247.
b		PROGRAM FEES	900099	12,487.	12,487.	
c		ADVERTISING FEES	900099	2,662.	2,662.	
d						
e						
f		All other program service revenue				
g		Total. Add lines 2a-2f		4,148,396.		
Other Revenue		3	Investment income (including dividends, interest, and other similar amounts)		3,490.	3,490.
	4	Income from investment of tax-exempt bond proceeds				
	5	Royalties				
	6 a	Gross rents	(i) Real			
			(ii) Personal			
	b	Less: rental expenses	6b			
	c	Rental income or (loss)	6c			
	d	Net rental income or (loss)				
	7 a	Gross amount from sales of assets other than inventory	(i) Securities			
			(ii) Other			
	b	Less: cost or other basis and sales expenses	7b		631.	
	c	Gain or (loss)	7c		-631.	
	d	Net gain or (loss)		-631.	-631.	
8 a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	8a				
		b	Less: direct expenses	8b		
		c	Net income or (loss) from fundraising events			
9 a	Gross income from gaming activities. See Part IV, line 19	9a				
		b	Less: direct expenses	9b		
		c	Net income or (loss) from gaming activities			
10 a	Gross sales of inventory, less returns and allowances	10a				
		b	Less: cost of goods sold	10b		
		c	Net income or (loss) from sales of inventory			
Miscellaneous Revenue	11 a	MISCELLANEOUS INCOME	Business Code 900099	6,345.	6,345.	
	b					
	c					
	d	All other revenue				
	e	Total. Add lines 11a-11d		6,345.		
12	Total revenue. See instructions		4,157,600.	4,157,600.	0.	0.

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	1,100,712.	935,605.	165,107.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	253,247.	215,260.	37,987.	
9 Other employee benefits	178,756.	151,943.	26,813.	
10 Payroll taxes	80,476.	68,405.	12,071.	
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting	14,224.	12,090.	2,134.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)				
12 Advertising and promotion	1,116,855.	949,327.	167,528.	
13 Office expenses	70,160.	59,636.	10,524.	
14 Information technology	49,008.	41,657.	7,351.	
15 Royalties				
16 Occupancy	188,140.	159,919.	28,221.	
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	20,871.	17,740.	3,131.	
23 Insurance	12,231.	10,396.	1,835.	
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <b>SPONSORSHIP/EVENT EXPEN</b>	755,895.	642,511.	113,384.	
b <b>OTHER EXPENSES</b>	375,460.	319,141.	56,319.	
c <b>ADMINISTRATION FEE</b>	206,662.	175,663.	30,999.	
d <b>COLLATERAL PRODUCTION/B</b>	158,631.	134,836.	23,795.	
e All other expenses				
25 <b>Total functional expenses.</b> Add lines 1 through 24e	4,581,328.	3,894,129.	687,199.	0.
26 <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here  if following SOP 98-2 (ASC 958-720)

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year	
Assets	1	Cash - non-interest-bearing	3,339,472.	1	3,302,204.
	2	Savings and temporary cash investments		2	
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net	460,614.	4	147,428.
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges		9	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	396,855.	10a	
	b	Less: accumulated depreciation	265,850.	10b	
			132,789.	10c	131,005.
	11	Investments - publicly traded securities		11	
	12	Investments - other securities. See Part IV, line 11		12	
	13	Investments - program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
15	Other assets. See Part IV, line 11	316,935.	15	266,270.	
16	<b>Total assets.</b> Add lines 1 through 15 (must equal line 33)	4,249,810.	16	3,846,907.	
Liabilities	17	Accounts payable and accrued expenses	144,216.	17	115,942.
	18	Grants payable		18	
	19	Deferred revenue		19	
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	431,890.	25	480,989.
	26	<b>Total liabilities.</b> Add lines 17 through 25	576,106.	26	596,931.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 27, 28, 32, and 33.				
	27	Net assets without donor restrictions		27	
	28	Net assets with donor restrictions		28	
	Organizations that do not follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 29 through 33.				
	29	Capital stock or trust principal, or current funds	0.	29	0.
	30	Paid-in or capital surplus, or land, building, or equipment fund	132,789.	30	131,005.
	31	Retained earnings, endowment, accumulated income, or other funds	3,540,915.	31	3,118,971.
32	<b>Total net assets or fund balances</b>	3,673,704.	32	3,249,976.	
33	<b>Total liabilities and net assets/fund balances</b>	4,249,810.	33	3,846,907.	

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,157,600.
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,581,328.
3	Revenue less expenses. Subtract line 2 from line 1	3	-423,728.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	3,673,704.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	3,249,976.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	X	
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:			
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits		

**SCHEDULE D**  
(Form 990)

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2019**

Open to Public Inspection

Name of the organization

**CABARRUS COUNTY TOURISM AUTHORITY**

Employer identification number

**26-2726341**

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate value of contributions to (during year) .....		
3 Aggregate value of grants from (during year) .....		
4 Aggregate value at end of year .....		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?  Yes  No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?  Yes  No

**Part II Conservation Easements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

Preservation of land for public use (for example, recreation or education)  Preservation of a historically important land area

Protection of natural habitat  Preservation of a certified historic structure

Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included in (a) .....	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ \_\_\_\_\_

4 Number of states where property subject to conservation easement is located ▶ \_\_\_\_\_

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?  Yes  No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$ \_\_\_\_\_

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?  Yes  No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X ▶ \$ \_\_\_\_\_

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ \$ \_\_\_\_\_

b Assets included in Form 990, Part X ▶ \$ \_\_\_\_\_

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange program
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 1f     |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment \_\_\_\_\_ %
  - b Permanent endowment \_\_\_\_\_ %
  - c Term endowment \_\_\_\_\_ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |  | Yes    | No |
|--|--------|----|
| (i) Unrelated organizations  | 3a(i)  |    |
| (ii) Related organizations   | 3a(ii) |    |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b     |    |

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements	215,790.		110,401.	105,389.
d Equipment	85,064.		76,966.	8,098.
e Other	96,001.		78,483.	17,518.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				<b>131,005.</b>

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely held equity interests .....		
(3) Other .....		
(A) .....		
(B) .....		
(C) .....		
(D) .....		
(E) .....		
(F) .....		
(G) .....		
(H) .....		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) .....		
(2) .....		
(3) .....		
(4) .....		
(5) .....		
(6) .....		
(7) .....		
(8) .....		
(9) .....		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) DEFERRED OUTFLOW OF RESOURCES	266,270.
(2) .....	
(3) .....	
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	266,270.

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) NET PENSION LIABILITY	464,531.
(3) DEFERRED INFLOWS OF RESOURCES	16,458.
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	480,989.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1	4,157,600.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
	a Net unrealized gains (losses) on investments	2a		
	b Donated services and use of facilities	2b		
	c Recoveries of prior year grants	2c		
	d Other (Describe in Part XIII.)	2d		
	e Add lines 2a through 2d	2e		0.
3	Subtract line 2e from line 1		3	4,157,600.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4a		
	b Other (Describe in Part XIII.)	4b		
	c Add lines 4a and 4b	4c		0.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	4,157,600.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements		1	4,581,328.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
	a Donated services and use of facilities	2a		
	b Prior year adjustments	2b		
	c Other losses	2c		
	d Other (Describe in Part XIII.)	2d		
	e Add lines 2a through 2d	2e		0.
3	Subtract line 2e from line 1		3	4,581,328.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4a		
	b Other (Describe in Part XIII.)	4b		
	c Add lines 4a and 4b	4c		0.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	4,581,328.

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART X, LINE 2:**

THE ORGANIZATION HAS ADOPTED ASC 740-10, EFFECTIVE FOR AUDIT YEARS ENDING AFTER DECEMBER 15, 2009, AS IT RELATES TO UNCERTAIN TAX POSITIONS FOR THE YEARS ENDED JUNE 30, 2020 AND HAS EVALUATED ITS TAX POSITIONS FOR ALL OPEN TAX YEARS. THE ORGANIZATION IS NOT CURRENTLY UNDER AUDIT NOR HAS THE ORGANIZATION BEEN CONTACTED BY THE INTERNAL REVENUE SERVICE.

BASED ON THE EVALUATION OF THE ORGANIZATIONS TAX POSITIONS, MANAGEMENT BELIEVES ALL POSITIONS TAKEN WOULD BE UPHELD UNDER AN EXAMINATION. THEREFORE, NO PROVISION FOR THE EFFECTS OF UNCERTAIN TAX POSITIONS HAVE BEEN RECORDED FOR THE YEARS ENDED JUNE 30, 2020.



**SCHEDULE J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

**2019**

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23. ▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Open to Public  
Inspection

Name of the organization

**CABARRUS COUNTY TOURISM AUTHORITY**

Employer identification number

**26-2726341**

**Part I Questions Regarding Compensation**

- 1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.
- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence   |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

**3** Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |  |  |
|--|--|
| <input type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                     |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study                    |
| <input type="checkbox"/> Form 990 of other organizations     | <input type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment?
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
- c** Participate in, or receive payment from, an equity-based compensation arrangement?
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
- b** Any related organization?
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
- b** Any related organization?
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
1b		
2		
4a		X
4b		X
4c		X
5a		
5b		
6a		
6b		
7		
8		
9		

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
{1} DONNA CARPENTER PRESIDENT/CEO	(i)	151,520.	0.	0.	0.	19,646.	171,166.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
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	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							





**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
TIM HAGLER	MEMBER OF BOARD & V	353,694.	THE ORGANIZ		X
ANGELA BROWN	MEMBER OF BOARD & G	10,286.	THE ORGANIZ		X
ERIC HABSCHIED	MEMBER OF BOARD & D	30,117.	THE ORGANIZ		X

**Part V Supplemental Information.**

Provide additional information for responses to questions on Schedule L (see instructions).

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF PERSON: TIM HAGLER

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

MEMBER OF BOARD & VP OF COMMUNITY RELATIONS - CHARLOTTE MOTOR SPEEDWAY

(C) AMOUNT OF TRANSACTION \$ 353,694.

(D) DESCRIPTION OF TRANSACTION: THE ORGANIZATION HAS A MARKETING AGREEMENT AND EVENT SPONSORSHIP WITH CHARLOTTE MOTOR SPEEDWAY AND THE ORGANIZATION PAID CHARLOTTE MOTOR SPEEDWAY \$353,694 DURING THE YEAR ENDED JUNE 30, 2020.

(E) SHARING OF ORGANIZATION REVENUES? = NO

(A) NAME OF PERSON: ANGELA BROWN

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

MEMBER OF BOARD & GENERAL MANAGER - GREAT WOLF LODGE

(C) AMOUNT OF TRANSACTION \$ 10,286.

(D) DESCRIPTION OF TRANSACTION: THE ORGANIZATION PAID GREAT WOLF LODGE \$10,286 FOR SPONSORSHIP OF GROUP MEETINGS DURING THE YEAR ENDED JUNE 30, 2020.

(E) SHARING OF ORGANIZATION REVENUES? = NO

**Part V** Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule L (see instructions).

(A) NAME OF PERSON: ERIC HABSCHIED

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

MEMBER OF BOARD & DIRECTOR OF SALES & MARKETING - EMBASSY SUITES.

(C) AMOUNT OF TRANSACTION \$ 30,117.

(D) DESCRIPTION OF TRANSACTION: THE ORGANIZATION PAID EMBASSY SUITES

\$30,117 FOR SPONSORSHIP OF GROUP MEETINGS DURING THE YEAR ENDED JUNE 30,

2020.

(E) SHARING OF ORGANIZATION REVENUES? = NO

SCHEDULE O  
(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
▶ Attach to Form 990 or 990-EZ.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

2019

Open to Public  
Inspection

Name of the organization

CABARRUS COUNTY TOURISM AUTHORITY

Employer identification number

26-2726341

FORM 990, PART I, DOING BUSINESS AS:

CABARRUS COUNTY CONVENTION AND VISITORS BUREAU

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

VISITOR SPENDING.

FORM 990, PART VI, SECTION B, LINE 11B:

A DRAFT COPY OF THE 990 RETURN WAS PRESENTED TO THE BOARD OF DIRECTORS AT  
THEIR REGULARLY SCHEDULED MEETING FOR REVIEW AND APPROVAL.

FORM 990, PART VI, SECTION B, LINE 12C:

THE CONFLICT OF INTEREST POLICY WAS DISTRIBUTED ANNUALLY TO THE BOARD OF  
DIRECTORS AND THE EMPLOYEES. WITHIN THE POLICY THERE ARE PROCEDURES FOR  
COMMUNICATING CONCERNS TO SUPERVISORS AND THE BOARD OF DIRECTORS.

FORM 990, PART VI, SECTION B, LINE 15A:

SALARY OF THE CEO IS DETERMINED BY THE BOARD OF DIRECTORS. THE ORGANIZATION  
USED COMPARABLE DATA FROM OTHER RESOURCES SUCH AS DESTINATION MARKETNG  
ASSOCIATION INTERNATIONAL FOR CEO COMPENSATION.

FORM 990, PART VI, SECTION C, LINE 19:

THE ORGANIZATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND  
FINANCIAL STATEMENTS ARE AVAILABLE FOR PUBLIC INSPECTION AT THE  
ORGANIZATION'S OFFICE UPON REQUEST. ORGANIZATIONS STAFF ARE AVAILABLE TO  
PROVIDE SUPERVISION AND ANSWER ANY QUESTIONS THE INQUIRING PARTY MAY HAVE.

Name of the organization

CABARRUS COUNTY TOURISM AUTHORITY

Employer identification number

26-2726341

FORM 990, PART XI, LINE 2C

THE AUDIT COMMITTEE ASSUMES RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT AND THE SELECTION OF THE INDEPENDENT AUDITOR.

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Reports

**SUBJECT:**

County Manager - Monthly Building Activity Reports

**BRIEF SUMMARY:**

The Board of Commissioners requested monthly reports of building and permit activities including information of plans under review.

**REQUESTED ACTION:**

For informational purposes. No action required.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Kelly Sifford, Planning and Development Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- ▢ Report
- ▢ Report

**Cabarrus County Construction Standards Dodge Report 1/1/2021-1/31/2021**

Jurisdiction: All

<b>New Construction</b>				
Description	Const Code	Buildings	Housing Units	Estimated Cost
Single Family Houses Detached	101	163	162	\$27,426,429.01
Manufactured Home (Mobile Homes)	106	5	0	\$27,000.00
Amusement, Social, and Recreational	318	1	0	\$283,900.00
Office, Bank, and Professional Buildings	324	4	1	\$4,653,436.00
Public Works and Utilities Buildings	325	1	0	\$18,500.00
Schools and Other Educational Buildings	326	2	0	\$80,000.00
Stores and Customer Services	327	1	0	\$0.00
Other Nonresidential Buildings	328	10	0	\$1,229,643.00
Structures Other Than Buildings	329	4	0	\$105,810.00
Other	999	30	1	\$1,276,004.00
<b>Sub Total (New Construction)</b>		<b>221</b>	<b>164</b>	<b>\$35,100,722.01</b>
<b>Addition, Alteration, and Conversion</b>				
Description	Const Code	Buildings	Housing Units	Estimated Cost
Additions, Alterations and Conversions - Residential	434	76	1	\$1,468,535.00
Additions, Alterations and Conversions - Nonresidential and No housekeeping	437	8	0	\$2,831,420.00
Additions of Residential Garages and Carports	438	5	0	\$162,100.00
<b>Sub Total (Addition, Alteration, and Conversion)</b>		<b>89</b>	<b>1</b>	<b>\$4,462,055.00</b>
<b>Demolition of Buildings</b>				
Description	Const Code	Buildings	Housing Units	Estimated Cost
Single Family Houses	645	1	0	\$4,500.00
All Other Buildings and Structures	649	4	0	\$247,000.00
<b>Sub Total (Demolition of Buildings)</b>		<b>5</b>	<b>0</b>	<b>\$251,500.00</b>
<b>Grand Total</b>		<b>315</b>	<b>165</b>	<b>\$39,814,277.01</b>

## Cabarrus County Commercial Building Plan Review Summary

*Begin Date: 1/1/2021 through End Date: 1/31/2021*

File Date	Address	Application Name	Description	Est Cost	Est Sq Ft	
BU2021-00012	1/4/2021	8520 PIT STOP CT NW CONCORD, NC 28027	GAIS CONSTRUCTION, INC.	KEEPING EXISTING RESTROOMS AND KITCHEN HOOD. MINIMAL CHANGES TO RESTAURANT LAYOUT.	\$796,000	2,500
BU2021-00021	1/5/2021	102 ELWOOD ST KANNAPOLIS, NC 28081	HART WALL AND PAVER SYSTEMS, INC.	Evan Multi-Family Retaining Wall - 153 l.f.	\$12,000	153
BU2021-00023	1/5/2021	6255 FERNWOOD DR CONCORD, NC 28027	DE NYSE COMPANIES	Hawthorne Glen Signage~~construct and install secondary ID sign at back entry to property	\$10,800	24
BU2021-00026	1/5/2021	4200 STOUGH RD CONCORD, NC 28027	RITE LITE SIGNS, INC.	Ground Mounted Illuminated Monument and Non Illuminated Wall Pan Sign	\$0	0
BU2021-00042	1/6/2021	5225 POPLAR TENT RD CONCORD, NC 28027	STATESVILLE ROOFING COMPANY, INC	CVS~~Overlay existing EPDM roof, mechanically attached new Firestone .060 TPO membrane thru existing EPDM roof into metal deck.	\$65,220	8,483
BU2021-00048	1/7/2021	6001 GATEWAY CENTER DR KANNAPOLIS, NC 28027	Gateway Mortgage Signs	Adding cabinet signs - 108"x20" on front and back and window vinyl on front door.	\$950	18
BU2021-00078	1/11/2021	4480 TRINITY CHURCH RD KANNAPOLIS, NC 28081	SDH CHARLOTTE LLC	Stone entrance monument w/ sign face	\$1,500	14
BU2021-00085	1/11/2021	3541 GLENVIEW AVE KANNAPOLIS, NC 28081	NEW DIMENSIONS OUTDOOR SERVICES INC	Kellswater Lot 49~~New retaining wall, 85.5.	\$9,000	86
BU2021-00090	1/12/2021	980 LEE-ANN DR NE CONCORD, NC 28025	COLONY BUILDERS INC	Expansion of Existing Dental Office into Adjacent Vacant Tenant Space	\$150,000	150,000
BU2021-00101	1/12/2021	3155 FOXFORD RD CONCORD, NC 28025	G.W. LILES CONSTRUCTION COMPANY, INC	CABARRUS COUNTY~~ Open air archery range with six lanes. Archer shooting locations are under roof. The remainder of the range is surrounded by walls, but open above.	\$283,900	515
BU2021-00120	1/13/2021	7625 HENDRICK AUTO PLZ NW CONCORD, NC 28027	JAMES R VANNOY & SONS CONSTRUCTION	CONSTRUCTION OF HENDRICK CONCORD DISPLAY AND STORAGE BUILDING - SHOWROOM, OFFICE AREA, MEZZANINE	\$4,296,436	61,960
BU2021-00122	1/13/2021	8520 PIT STOP CT NW CONCORD, NC 28027	Diversified Signs & Graphics	1 wall sign on front Acrylic formed face with vinyl graphics. Wall sign on side Letters painted Side Led lit "Curbside " Channel letters aluminum arrow routed and push thru acrylic letters on Face	\$10,050	0
BU2021-00134	1/14/2021	4751 NC HWY 49 N CONCORD, NC 28025	G.W. LILES CONSTRUCTION COMPANY, INC	Project involves replacement of a pre-manufactured structure with a conventionally framed structure of like square footage. Structure to have a metal roof and wall panels to match existing Arena materials. Mechanical work is limited to installing a mini-split unit. Electrical work is limited to power of the mini-split unit, light fixture and associated switch. The work will also include reconnection of the existing sprinkler system into the new structure. No site work is proposed.	\$91,700	200
BU2021-00137	1/14/2021	4511 WEDDINGTON RD CONCORD, NC 28027	CABARRUS COUNTY SCHOOLS	2020 CCS Virtual Academy Mobile Complex ~~ 140x50 mobile complex with classrooms and bathrooms FOOTING AND FOUNDATION ONLY	\$70,000	7,000
BU2021-00145	1/15/2021	1110 N RIDGE AVE KANNAPOLIS, NC 28083	CASCO SIGNS INC	Installation of two new wall signs	\$0	0
BU2021-00156	1/15/2021	3700 TAYLOR GLEN LN NW CONCORD, NC 28027	IES COATINGS, INC.	REMOVE OLD ROOF, REPLACE ANY DAMAGED WOOD; INSTALL NEW ROOF	\$716,750	2,200

## Cabarrus County Commercial Building Plan Review Summary

*Begin Date: 1/1/2021 through End Date: 1/31/2021*

BU2021-00160	1/15/2021	845 CHURCH ST N CONCORD, NC 28025	D.L. BARRIER CONSTRUCTION CO LLC	NEW INTERIOR CONSTRUCTION OF THE 1ST FLOOR. THE WORK CONSIST OF NON STRUCTURAL DEMOLITION, AND NEW GENERAL PLUMBING, ELECTRICAL, AND MECHANICAL WORK. NO STRUCTURAL WORK IS REQUIRED. FURNITURE PERMIT WILL BE RUN SEPARATELY. THERE IS NO CHANGE OF USE	\$356,275	4,468
BU2021-00162	1/15/2021	6051 BAYFIELD PKWY KANNAPOLIS, NC 28027	JOHN ABBOTT CONSTRUCTION CONST CO INC	Replace existing menu board with digital ones, canopy order points, add new pre-browse boards for each lane. Replace double arm gateway	\$28,000	0
BU2021-00165	1/19/2021	3901 SHILOH CHURCH RD DAVIDSON, NC 28036	KT GRADING, LLC	Adair Woods Subdivision ~ 3,125 LINEAR FEET RETAINING WALL FOR SUBDIVISION	\$544,538	3,125
BU2021-00166	1/19/2021	580 KANNAPOLIS PKWY CONCORD, NC 28027	(SHELL) KANNAPOLIS CONSTRUCTION COMPANY, INC.	SHELL Two tenant cold dark shell building with 2,357 sf drive thru restaurant and a 2,025 sf retail space. 2" meter & 1" meter for wsacc	\$860,574	4,382
BU2021-00168	1/19/2021	221 KYLIE CT LOCUST, NC 28097	STANLY CONSTRUCTION SERVICES INC.	New 1 Story Office Building	\$140,000	1,314
BU2021-00177	1/20/2021	2420 SUPERCENTER DR NE KANNAPOLIS, NC 28083		installing channel letters, exterior, and interior, and new face on existing pylon sign	\$1,500	1,500
BU2021-00185	1/20/2021	7750 CALDWELL RD HARRISBURG, NC 28075	DIMENSIONS GENERAL CONTRACTORS INC	Ford Charlotte Service School Men's Restroom Renovation~~~Relocate lights and light switch, relocate plumbing underslab for new restroom layout, relocate water supply lines for new layout, finishes	\$67,000	7,621
BU2021-00210	1/22/2021	2702 N CANNON BLVD KANNAPOLIS, NC 28083	INFINITY CONTRACTORS, INC.	870073 - AT&T 072-076 Generator ~ AT&T proposes to install a generator with a 4'x10' lease area/pad and new ATS within existing compound. No tower work, no electrical upgrades	\$18,500	0
BU2021-00259	1/26/2021	3572 FIELDSTONE TRCE MIDLAND, NC 28107	MYRICK CONSTRUCTION, INC.	CONSTRUCT COMMERCIAL ADDITION TO EXISTING BUILDING INCLUDES OFFICE SPACE - 17,646 SQFT	\$1,244,925	17,646
BU2021-00262	1/26/2021	11132 RENAISSANCE DR DAVIDSON, NC 28036		Mounting 5" deep fabricated aluminum illuminated letters to front of building	\$1,600	13
BU2021-00263	1/26/2021	818 S MAIN ST KANNAPOLIS, NC 28081	SERVPRO OF ANSON, STANLY, AND RICHMOND COUNTIES	REMODEL INTERIOR - NO STRUCTURAL WORK - REPLACE/UPGRADE ELECTRICAL	\$39,000	10,000
BU2021-00278	1/28/2021	1706 S MAIN ST KANNAPOLIS, NC 28081	RITE LITE SIGNS, INC.	9' x 6' 6 3/4" monument sign - illuminated - using existing electrical	\$16,300	50
BU2021-00280	1/28/2021	6001 GATEWAY CENTER DR KANNAPOLIS, NC 28027	AVERY GENERAL CONTRACTING INC	Shell Upfit for Grounds and Vine Coffee Shop	\$0	0
BU2021-00281	1/28/2021	12001 MCMANUS RD MIDLAND, NC 28107	JDH CONTRACTING, INC.	195' Monpole Cell Tower, antenna mount, equipment mount, 8' wood rail fence and 800 AMP primary service.	\$0	0
BU2021-00292	1/29/2021	8930 E FRANKLIN ST MT PLEASANT, NC 28124	SERVPRO OF ANSON, STANLY, AND RICHMOND COUNTIES	REPLACE ENTIRE ROOF (FIRE DAMAGE)	\$18,000	1,828
BU2021-00294	1/29/2021	715 CABARRUS AVE W CONCORD, NC 28027	CABARRUS COUNTY	Cooperative Extension Greenhouse~~Greenhouse will be used for educational programs	\$10,000	336
<b>Total Plans Reviewed: 32</b>					<b>\$49,302,590</b>	<b>1,427,180</b>

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Reports

**SUBJECT:**

County Manager - Monthly New Development Report

**BRIEF SUMMARY:**

The Board of Commissioners requested monthly reports of new development activities including information of plans under review.

**REQUESTED ACTION:**

For informational purposes. No action required.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Kelly Sifford, Planning and Development Director

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- Report

Jurisdiction	Subdivision	APF Base Data	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	Units Approved	Units Issued	Units Remaining	Dev Order Approved	DO Lag Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Concord	CAMPBELL FAMILY FARM	100 CROWELL DRIVE SW TOWNHOMES	100 CROWELL DRIVE SW TOWNHOMES	APF2016-00018	Patricia J Molander	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending	Single Family	2/4/2021	140	24	116			53.76	27.02	35.84	116.62	44.544	22.388	29.696	96.628
Concord	JOHN SEARS			APF2020-00041	JOHN SEARS	Jay M Robinson High School	Concord Middle School	W M Irvin Elementary School		Pending			4	0	4			0	0	0	0	0.928	0.464	0.62	2.012
Concord	PATRICK RILEY			APF2019-00026	PATRICK RILEY	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			64	0	64			0	0	0	0	14.848	7.424	9.92	32.192
Concord	OLD TOWNE DEVELOPMENT CORPORATION	61 CABARRUS TOWNHOMES	61 CABARRUS TOWNHOMES	APF2017-00015	OLD TOWNE DEVELOPMENT CORPORATION	Concord High School	Concord Middle School	Coltrane-Webb Elementary School		Pending	Townhouse	3/15/2018	6	3	3			0.828	0.414	0.552	1.794	0.414	0.207	0.276	0.897
Harrisburg	AVANTO PROPERTIES	ABBINGTON PLACE	ABBINGTON PLACE	APF2008-00040	AVANTO PROPERTIES	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Active Building Permitting	Single Family	6/1/2020	395	330	65		12/30/2015	151.68	76.235	101.12	329.035	24.96	12.545	16.64	54.145
Kannapolis	SHERWOOD DEVELOPMENT GROUP	ADAIR WOODS	ADAIR WOODS	APF2020-00015	SHERWOOD DEVELOPMENT GROUP	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Sketch			157	0	157			0	0	0	0	36.424	18.212	24.335	78.971
Concord	SCOTT KIGER	ADDISON FIFTEEN20	ADDISON FIFTEEN20	APF2019-00007	SCOTT KIGER	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Multi Family		0	0	0			0	0	0	0	0	0	0	0
Harrisburg	ATX LLC A NC LLC	ADDISON PARK	ADDISON PARK	APF2016-00013	ATX LLC A NC LLC	Hickory Ridge High School	Hickory Ridge Middle School			Construction Drawing Review	Age Restricted	12/11/2020	55	23	32			0	0	0	0	0	0	0	0
Kannapolis	DARREN LUCAS	AFTON RIDGE APARTMENTS	AFTON RIDGE APARTMENTS	APF2011-00003	DARREN LUCAS	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active Building Permitting	Multi Family	6/5/2014	414	122	292	11/13/2012		96.048	48.024	64.17	208.242	67.744	33.872	45.26	146.876
Cabarrus County	BRIAN HUNTLEY	ALEXANDER ESTATES	ALEXANDER ESTATES	APF2008-00035	BRIAN HUNTLEY	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Expired	Single Family	4/16/2018	19	1	18			7.296	3.667	4.864	15.827	6.912	3.474	4.608	14.994
Harrisburg	GeoScience Group	ALLBURN	ALLBURN	APF2017-00008	GeoScience Group	Hickory Ridge High School	J N Fries Middle School	Pitt School Road Elementary School		Pending	Single Family		58	0	58			23.04	11.58	15.36	49.98	22.272	11.194	14.848	48.314
Concord	MIKE SHEA	ALLEN FARM SUBDIVISION	ALLEN FARM SUBDIVISION	APF2008-00058	MIKE SHEA	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Active Platting	Single Family	1/29/2021	452	440	12	11/20/2007		173.568	87.236	115.712	376.516	4.608	2.316	3.072	9.996
Concord	WES PLYLER	ANNSBOROUGH PARK	ANNSBOROUGH PARK	APF2019-00010	WES PLYLER	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Single Family		0	0	0			0	0	0	0	0	0	0	0
Concord	Jay M Robinson High School	APOLLO REALTY PARTNERS CONCEPT	APOLLO REALTY PARTNERS CONCEPT	APF2019-00019	WES PLYLER	Jay M Robinson High School	HD Winkler Middle School	Charles A Boger Elementary School		Pending	Multi Family		96	0	96			0	0	0	0	22.272	11.136	14.88	48.288
Cabarrus County	ARBOR OAKS	ARBOR OAKS	ARBOR OAKS	APF2008-00138	KSIN PROPERTIES, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		All Lots Platted	Single Family	7/18/2019	20	10	10	10/21/2002		7.68	3.86	5.12	16.66	3.84	1.93	2.56	8.33
Concord	PERRAULT MATTHEW MARK CO-TR	ARCHIBALD ROAD SUBDIVISION	ARCHIBALD ROAD SUBDIVISION	APF2017-00016	PERRAULT MATTHEW MARK CO-TR	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending	Single Family		149	0	149			57.216	28.757	38.144	124.117	57.216	28.757	38.144	124.117
Concord	CHRIS McINTYRE	ARCHIBALD SUBDIVISION	ARCHIBALD SUBDIVISION	APF2018-00019	CHRIS McINTYRE	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending	Single Family		84	0	84			32.256	16.212	21.504	69.972	32.256	16.212	21.504	69.972
Concord	Isaac Padgett	ARENA COMMONS	ARENA COMMONS	APF2017-00029	Isaac Padgett	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Pending	Multi Family		65	0	65			15.08	7.54	10.075	32.695	15.08	7.54	10.075	32.695
Cabarrus County	DAN MOSER	ASHEBROOK	ASHEBROOK	APF2008-00139	DAN MOSER	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Closed-Built Out	Single Family	8/17/2009	105	96	9	5/21/1998		40.32	20.265	26.88	87.465	3.456	1.737	2.304	7.497
Kannapolis	FIFTH THIRD BANK	AUBURN WOODS	AUBURN WOODS	APF2013-00007	FIFTH THIRD BANK	Concord High School	Concord Middle School	Royal Oaks Elementary School		Inactive	Single Family		256	0	256	4/22/2002		98.304	49.408	65.536	213.248	98.304	49.408	65.536	213.248
Kannapolis	DR Horton	AUSTIN CORNERS	AUSTIN CORNERS	APF2016-00023	DR Horton	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active Building Permitting	Single Family	10/7/2020	146	140	6			56.064	28.178	37.376	121.618	2.304	1.158	1.536	4.998
Kannapolis	UNKNOWN	AUTUMN CHASE	AUTUMN CHASE	APF2014-00020	UNKNOWN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Inactive	Single Family		28	0	28	3/6/1991		10.752	5.404	7.168	23.324	10.752	5.404	7.168	23.324
Kannapolis	WYNNFIELD PROPERTIES	AUTUMN CREST APARTMENTS	AUTUMN CREST APARTMENTS	APF2014-00013	WYNNFIELD PROPERTIES	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Pending	Multi Family	8/20/2014	87	0	87			20.184	10.092	13.485	43.761	20.184	10.092	13.485	43.761
Harrisburg	ELLEDGE JACK L	AUTUMN GLEN AT MOREHEAD	AUTUMN GLEN AT MOREHEAD	APF2016-00012	ELLEDGE JACK L	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Denied	Single Family		150	0	150			57.6	28.95	38.4	124.95	57.6	28.95	38.4	124.95
Cabarrus County	JERRY R MCSORLEY	AVIGNON	AVIGNON	APF2008-00122	JERRY R MCSORLEY	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Expired	Single Family		23	0	23			8.832	4.439	5.888	19.159	8.832	4.439	5.888	19.159
Kannapolis	James M Hood	AZALEA ESTATES	AZALEA ESTATES	APF2008-00140	James M Hood	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Wincoff Elementary School		In Progress	Single Family	9/19/2017	42	40	2	10/2/2002	12/31/2010	16.128	8.106	10.752	34.986	0.768	0.386	0.512	1.666
Mt. Pleasant	BARRINGER GRADY R CO-TRUSTEE	BARRINGER'S TRACE	BARRINGER'S TRACE	APF2014-00004	BARRINGER GRADY R CO-TRUSTEE	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Closed-Built Out	Multi Family		64	0	64			14.848	7.424	9.92	32.192	14.848	7.424	9.92	32.192
Cabarrus County	Charles F McDonald	BECKENHAM	BECKENHAM	APF2008-00029	Charles F McDonald	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		Active Platting	Single Family	6/3/2020	20	10	10	2/15/2007	2/15/2013	7.68	3.86	5.12	16.66	3.84	1.93	2.56	8.33
Concord	Nitlock Development Corporation	BEDFORD FARMS	BEDFORD FARMS	APF2008-00042	Nitlock Development Corporation	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Active (platting & permitting)	Single Family	1/26/2021	166	141	25	7/18/2006	3/18/2016	63.744	32.038	42.496	138.278	9.6	4.825	6.4	20.825
Concord	ERVIN JOE H GRADING CO INC	BEECHWOOD PLACE	BEECHWOOD PLACE	APF2017-00039	ERVIN JOE H GRADING CO INC	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending	Multi Family		80	0	80			18.56	9.28	12.4	40.24	18.56	9.28	12.4	40.24
Concord	WINDSWEPT FARMS LLC	BELVEDERE TOWNHOMES	BELVEDERE TOWNHOMES	APF2017-00012	WINDSWEPT FARMS LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Wincoff Elementary School		Pending	Townhouse		39	0	39			4.554	2.277	3.036	9.867	5.362	2.691	3.588	11.661
Midland	TL HARRELL LAND DEVELOPMENT	BETHEL GLEN	BETHEL GLEN	APF2008-00141	TL HARRELL LAND DEVELOPMENT	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		All Lots Platted	Single Family	2/18/2020	193	167	26	10/16/2000		74.112	37.249	49.408	160.769	9.984	5.018	6.656	21.658
Concord	EDWIN SUDDRETH	BILLINGS PROPERTY	BILLINGS PROPERTY	APF2019-00027	EDWIN SUDDRETH	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending			58	0	58			0	0	0	13.456	6.728	8.99	29.174	
Concord	COOK FAMILY PARTNERSHIP	BIRCHWOOD COMMONS	BIRCHWOOD COMMONS	APF2014-00007	COOK FAMILY PARTNERSHIP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Pending	Multi Family	6/8/2018	98	100	-2			22.736	11.368	15.19	49.294	-0.464	-0.232	-0.31	-1.006
Harrisburg	SOUTH FORK VENTURES LLC	BLACKWELDER SUBDIVISION	BLACKWELDER SUBDIVISION	APF2020-00004	SOUTH FORK VENTURES LLC	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Pending			71	0	71			0	0	0	0	16.472	8.236	11.005	35.713
Locust	GUS SCHAD	BLUFFTON PARK	BLUFFTON PARK	APF2020-00003	GUS SCHAD	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Pending		11/19/2020	15	6	9			0	0	0	0	2.088	1.044	1.395	4.527
Harrisburg	Blume Family Farm, LLC/MI Homes	BLUME FAMILY FARM	BLUME FAMILY FARM	APF2013-00001	Blume Family Farm, LLC/MI Homes	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active Building Permitting	Single Family	10/28/2019	297	313	-16	10/14/2015		114.048	57.321	76.032	247.401	-6.144	-3.088	-4.096	-13.328
Concord	MATT MANDLE	BRANCHVIEW DRIVE SITE	BRANCHVIEW DRIVE SITE	APF2020-00026	MATT MANDLE	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			144	0	144			0	0	0	0	33.408	16.704	22.32	72.432
Concord	Craft Homes	BRANDON RIDGE	BRANDON RIDGE	APF2008-00030	Craft Homes	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Closed-Built Out		6/17/2008	321	322	-1	11/18/2002		102	45	40	0	-0.232	-0.116	-0.155	-0.503
Kannapolis	UNKNOWN	BRANTLEY CREEK	BRANTLEY CREEK	APF2014-00014	UNKNOWN	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School		All Lots Platted	Single Family	12/18/2017	74	64	10	5/5/1999		28.416	14.282	18.944	61.642	3.84	1.93	2.56	8.33
Kannapolis	UNKNOWN	BRANTLEY WOODS	BRANTLEY WOODS	APF2014-00018	UNKNOWN	Concord High School	Concord Middle School	Royal Oaks Elementary School		Closed-Built Out	Single Family	9/29/2008	79	64	15			30.336	15.247	20.224	65.807	5.76	2.895	3.84	12.495
Concord	TOM MCCELLELLAN	BREAKWATER HIGHWAY 601	BREAKWATER HIGHWAY 601	APF2020-00012	TOM MCCELLELLAN	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		Pending			332	0	332			0	0	0	0	77.024	38.512	51.46	166.996
Concord	BLOC DESIGN	BREAKWATER SUNVIEW	BREAKWATER SUNVIEW	APF2020-00011	BLOC DESIGN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Beverly Hills Elementary School		Pending			161	0	161			0	0	0	0	37.352	18.676	24.955	80.983
Harrisburg	BILL WHITLEY	BRIDGE POINTE	BRIDGE POINTE	APF2008-00039	BILL WHITLEY	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Active Building Permitting	Single Family	2/19/2016	199	189	10	9/20/2004	11/28/2014	76.416	38.407	50.944	165.767	3.84	1.93	2.56	8.33
Harrisburg	Ric Killian	BRIDGE POINTE PHASE 6	BRIDGE POINTE PHASE 6	APF2008-00174	Ric Killian	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Active (platting & permitting)	Single Family	2/17/2016	45	15	30	5/16/2006	5/16/2012	17.28	8.685	11.52	37.485	11.52	5.79	7.68	24.99
Kannapolis	KLK Properties	BRIDGES OF CABARRUS APARTMENTS	BRIDGES OF CABARRUS APARTMENTS	APF2016-00024	KLK Properties	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending	Multi Family	6/24/2019	144	144	0			33.408	16.704	2					

Jurisdiction	Subdivision	APF Base Data Subdivision	Subdivision	Appr	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	Units Approved	Units Issued	Units Remaining	Dev Order Approved	Exp. Lag	DO Lag	Elementary Students	Middle Students	High School Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Harrisburg	CAMELLIA GARDENS	CAMELLIA GARDENS	CAMELLIA GARDENS	APF2018-00030	ASSOCIATES	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Pending	Single Family		95	0	95				36.48	18.335	24.32	79.135	36.48	18.335	24.32	79.135
Concord	CANNON CROSSING	CANNON CROSSING	CANNON CROSSING	APF2018-00036	RHEIN INTEREST OF CHARLOTTE, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (plating & permitting)	Single Family	12/18/2014	207	209	-2	5/20/2004	3/15/2016		79.488	39.951	52.992	172.431	-0.768	-0.386	-0.512	-1.666
Concord	CANNON RUN SINGLE FAMILY	CANNON RUN SINGLE FAMILY	CANNON RUN SINGLE FAMILY	APF2018-00029	MARK SWARTZ	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Single Family		203	0	203				77.952	39.179	51.968	169.099	77.952	39.179	51.968	169.099
Concord	CANNON RUN TOWNHOMES	CANNON RUN TOWNHOMES	CANNON RUN TOWNHOMES	APF2018-00028	MARK SWARTZ	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse		131	0	131				18.078	9.039	12.052	39.169	18.078	9.039	12.052	39.169
Harrisburg	CANTERFIELD ESTATES	CANTERFIELD ESTATES	CANTERFIELD ESTATES	APF2008-00170	Canterfield Estates	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Closed-Built Out	Single Family	11/21/2017	501	431	70				192.384	96.693	128.256	417.333	26.88	13.51	17.92	58.31
Kannapolis	CAROLINA SITE ACQUISITIONS	CAROLINA SITE ACQUISITIONS	CAROLINA SITE ACQUISITIONS	APF2021-00005	HUNTER OGLESBY	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending			294	0	294				0	0	0	0	68.208	34.104	45.57	147.882
Harrisburg	CARRIKER PROPERTY MI HOMES	CARRIKER PROPERTY MI HOMES	CARRIKER PROPERTY MI HOMES	APF2017-00026	CARRIKER FAMILY LLC	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Pending	Single Family		67	0	67				25.728	12.931	17.152	55.811	25.728	12.931	17.152	55.811
Cabarrus County	CASCADES AT SKYBROOK	CASCADES AT SKYBROOK	CASCADES AT SKYBROOK	APF2008-00142	NO APPLICANT	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	Townhouse	11/18/2011	76	75	1	11/11/2007	11/10/2013		10.488	5.244	6.992	22.724	0.138	0.069	0.092	0.299
Kannapolis	CASTLEBROOKE MANOR	CASTLEBROOKE MANOR	CASTLEBROOKE MANOR	APF2008-00121	Jim a brodnik	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (plating & permitting)	Single Family	1/9/2020	230	177	53	10/18/2007	5/30/2016		88.32	44.39	58.88	191.59	20.352	10.229	13.568	44.149
Midland	CEDAR CREEK	CEDAR CREEK	CEDAR CREEK	APF2019-00016	BURTON ENGINEERING	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Pending	Single Family		130	0	130				49.92	25.09	33.28	108.29	49.92	25.09	33.28	108.29
Cabarrus County	CEDARVALE FARM	CEDARVALE FARM	CEDARVALE FARM	APF2008-00120	PIONEER MILL(CHARLOTTE) AIP IV, LLP	Hickory Ridge High School	Hickory Ridge Middle School	Bethel Elementary School		Active (plating & permitting)	Single Family	7/29/2019	363	287	76	1/20/2005	10/8/2012		139.392	70.059	92.928	302.379	29.184	14.668	19.456	63.308
Concord	CEDARWOOD TOWNHOMES	CEDARWOOD TOWNHOMES	CEDARWOOD TOWNHOMES	APF2020-00028	ROBERT W NIXON	Concord High School	Concord Middle School	R Brown McAllister Elementary School		Pending			7	0	7				0	0	0	0	1.624	0.812	1.085	3.521
Kannapolis	CENTRAL PARK	CENTRAL PARK	CENTRAL PARK	APF2008-00054	NO APPLICANT	Concord High School	Concord Middle School	Royal Oaks Elementary School		All Lots Platted	Single Family	9/7/2016	126	125	1	10/16/2000			40.068	17.514	15.624	73.206	0.384	0.193	0.256	0.833
Kannapolis	CHARTER KANNAPOLIS	CHARTER KANNAPOLIS	CHARTER KANNAPOLIS	APF2018-00005	REO FUNDING SOLUTIONS III LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending		6/14/2019	425	348	77				0	0	0	0	17.864	8.932	11.935	38.731
Concord	CHRISTENBURY COMMONS - MULTI-FAMILY	CHRISTENBURY COMMONS - MULTI-FAMILY	CHRISTENBURY COMMONS - MULTI-FAMILY	APF2019-00005	JUSTIN MUELLER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending			268	0	268				0	0	0	0	62.176	31.088	41.54	134.804
Concord	CHRISTENBURY COMMONS - TOWNHOMES	CHRISTENBURY COMMONS - TOWNHOMES	CHRISTENBURY COMMONS - TOWNHOMES	APF2019-00004	JUSTIN MUELLER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending			82	0	82				0	0	0	0	19.024	9.512	12.71	41.246
Concord	CHRISTENBURY VILLAGE	CHRISTENBURY VILLAGE	CHRISTENBURY VILLAGE	APF2008-00062	Scott H. Binder	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Active Building Permitting	Single Family	9/29/2015	485	526	-41	2/15/2005	1/5/2016		186.24	93.605	124.16	404.005	-15.744	-7.913	-10.496	-34.153
Concord	CHRISTENBURY VILLAGE MULTI-FAMILY	CHRISTENBURY VILLAGE MULTI-FAMILY	CHRISTENBURY VILLAGE MULTI-FAMILY	APF2017-00038	CHRISTENBURY INVESTORS LLC	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Multi Family		160	0	160				37.12	18.56	24.8	80.48	37.12	18.56	24.8	80.48
Concord	CHRISTY TRACT	CHRISTY TRACT	CHRISTY TRACT	APF2021-00003	AUSTIN HUGHES	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending			79	0	79				0	0	0	0	18.328	9.164	12.245	39.737
Harrisburg	CHURCHILL FARMS	CHURCHILL FARMS	CHURCHILL FARMS	APF2014-00001	Meritage Homes	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		In Progress	Single Family	1/8/2018	110	105	5				42.24	21.23	28.16	91.63	1.92	0.965	1.28	4.165
Kannapolis	COLDWATER RIDGE APARTMENTS	COLDWATER RIDGE APARTMENTS	COLDWATER RIDGE APARTMENTS	APF2016-00026	DFB COMMERCIAL	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending	Multi Family		60	0	60				13.92	6.96	9.3	30.18	13.92	6.96	9.3	30.18
Cabarrus County	COLONIAL HILLS	COLONIAL HILLS	COLONIAL HILLS	APF2008-00143	PACAJERY REALTY, LLC	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		All Lots Platted	Single Family	6/1/2017	144	104	40	6/20/1996			55.296	27.792	36.864	119.952	15.36	7.72	10.24	33.32
Concord	CONCORD HEIGHTS	CONCORD HEIGHTS	CONCORD HEIGHTS	APF2017-00028	THOMAS GROUP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Active Building Permitting	Multi Family	10/5/2016	174	120	54				40.368	20.184	26.97	87.522	12.528	6.264	8.37	27.162
Concord	CONCORD MILLS APARTMENTS	CONCORD MILLS APARTMENTS	CONCORD MILLS APARTMENTS	APF2017-00017	PALISADES PROPERTIES INC	Cox Mill High School	Harris Road Middle School	Carl A Furr Elementary School		Pending	Single Family		192	0	192				73.728	37.056	49.152	159.936	73.728	37.056	49.152	159.936
Concord	CONCORD PARKWAY SOUTH APARTMENTS	CONCORD PARKWAY SOUTH APARTMENTS	CONCORD PARKWAY SOUTH APARTMENTS	APF2019-00032	STEVE WEBB	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Pending			336	0	336				0	0	0	0	77.952	38.976	52.08	169.008
Concord	CONCORD RIDGE	CONCORD RIDGE	CONCORD RIDGE	APF2008-00185	Robert Nixon	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Active Building Permitting	Multi Family	11/21/2017	360	288	72	3/29/2013			83.52	41.76	55.8	181.08	16.704	8.352	11.16	36.216
Concord	COPPERFIELD APARTMENTS	COPPERFIELD APARTMENTS	COPPERFIELD APARTMENTS	APF2016-00021	SYCAMORE DEVELOPMENT LLC	Concord High School	Concord Middle School	Beverly Hills Elementary School		Pending	Multi Family		360	0	360				83.52	41.76	55.8	181.08	83.52	41.76	55.8	181.08
Concord	COPPERFIELD TOWNHOMES	COPPERFIELD TOWNHOMES	COPPERFIELD TOWNHOMES	APF2017-00027	SYCAMORE DEVELOPMENT LLC	Concord High School	Concord Middle School	Beverly Hills Elementary School		Pending	Townhouse		64	0	64				8.832	4.416	5.888	19.136	8.832	4.416	5.888	19.136
Harrisburg	COURTYARDS AT HARRISBURG	COURTYARDS AT HARRISBURG	COURTYARDS AT HARRISBURG	APF2014-00009	CH LAND NO 2 (ROBINSON CH RD)	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Age Restricted Development	Age Restricted	3/23/2015	23	19	4				0	0	0	0	0	0	0	0
Harrisburg	COURTYARDS AT HARRISBURG PHASE 2	COURTYARDS AT HARRISBURG PHASE 2	COURTYARDS AT HARRISBURG PHASE 2	APF2015-00003	ADAM FIORENZA	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Age Restricted Development	Age Restricted		24	0	24				0	0	0	0	0	0	0	0
Harrisburg	COURTYARDS AT HARRISBURG PHASE III	COURTYARDS AT HARRISBURG PHASE III	COURTYARDS AT HARRISBURG PHASE III	APF2017-00003	NEWSTYLE COMMUNITIES	Hickory Ridge High School	C C Griffin Middle School	Harrisburg Elementary School		Age Restricted Development	Age Restricted	10/23/2019	4	4	0				1.536	0.772	1.024	3.332	0	0	0	0
Harrisburg	COVENTRY	COVENTRY	COVENTRY	APF2008-00154	CROSLAND COVENTRY, LLC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	1/11/2005	137	128	9	6/12/2000	6/21/2002		52.608	26.441	35.072	114.121	3.456	1.737	2.304	7.497
Concord	COX MILL SITE LENNAR	COX MILL SITE LENNAR	COX MILL SITE LENNAR	APF2017-00019	HEFNER ERIC VONN & WF	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Single Family		101	0	101				38.784	19.493	25.856	84.133	38.784	19.493	25.856	84.133
Concord	COX MILLS ROAD MIXED USE NEIGHBORHOOD	COX MILLS ROAD MIXED USE NEIGHBORHOOD	COX MILLS ROAD MIXED USE NEIGHBORHOOD	APF2019-00012	CAREN WINGATE	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Single Family		85	0	85				0	0	0	0	32.64	16.405	21.76	70.805
Kannapolis	CRESCENT APARTMENTS AT KANNAPOLIS	CRESCENT APARTMENTS AT KANNAPOLIS	CRESCENT APARTMENTS AT KANNAPOLIS	APF2008-00119	C. JASON MC ARTHUR	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Inactive	Multi Family		580	0	580	2/2/2007			134.56	67.28	89.9	291.74	134.56	67.28	89.9	291.74
Concord	CRESCENT CIRCLE @ CONCORD MILLS	CRESCENT CIRCLE @ CONCORD MILLS	CRESCENT CIRCLE @ CONCORD MILLS	APF2008-00060	JACK SIDARI	Cox Mill High School	Harris Road Middle School	Carl A Furr Elementary School		Closed-Built Out	Multi Family	7/6/2012	624	624	0	1/16/2007			144.768	72.384	96.72	313.872	0	0	0	0
Kannapolis	CRESCENT RESOURCES AT KANNAPOLIS SINGLE FAMILY	CRESCENT RESOURCES AT KANNAPOLIS SINGLE FAMILY	CRESCENT RESOURCES AT KANNAPOLIS SINGLE FAMILY	APF2013-00012	CRESENT RESOURCES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Inactive	Single Family		119	0	119	2/2/2007			45.696	22.967	30.464	99.127	45.696	22.967	30.464	99.127
Kannapolis	CRESCENT RESOURCES AT KANNAPOLIS TOWNHOMES	CRESCENT RESOURCES AT KANNAPOLIS TOWNHOMES	CRESCENT RESOURCES AT KANNAPOLIS TOWNHOMES	APF2013-00011	CRESENT RESOURCES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Inactive	Townhouse		145	0	145	2/2/2007			20.01	10.005	13.34	43.355	20.01	10.005	13.34	43.355
Concord	CYPRESS VILLAGE	CYPRESS VILLAGE	CYPRESS VILLAGE	APF2020-00023	PAMELA BROOKS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active Building Permitting		2/2/2021	85	5	80				0	0	0	0	18.56	9.28	12.4	40.24
Kannapolis	CZ-2020-07	CZ-2020-07	CZ-2020-07	APF2020-00025	KIMLEY-HORN & ASSOCIATES	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending			270	0	270				0	0	0	0	62.64	31.32	41.85	135.81
Concord	DALTON WOODS	DALTON WOODS	DALTON WOODS	APF2017-00043	CHRIS MCINTYRE	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending			26	0	26				0	0	0	0	6.032	3.016	4.03	13.078
Concord	DAVCO MULTI-FAMILY PROJECT	DAVCO MULTI-FAMILY PROJECT	DAVCO MULTI-FAMILY PROJECT	APF2010-00008	Jeff Carpenter	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Withdrawn	Multi Family		336	0	336				77.952	38.976	52.08	169.008	77.952	38.976	52.08	169.008
Concord	DAVIDSON VILLAGES	DAVIDSON VILLAGES	DAVIDSON VILLAGES	APF2018-00015	SUSHANTH CHARABUDDI	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Wincoff Elementary School		Pending			61	0	61				0	0	0	0	14.152	7.076	9.455	30.683
Harrisburg	DAVIS CREEK	DAVIS CREEK	DAVIS CREEK	APF2017-00047	ANDREW STRONG	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Pending			48	0	48				0	0	0	0	11.136			

Jurisdiction	Subdivision	APF Data	Subdivision	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	Units Approved	Units Issued	Units Remaining	Dev Order Approved	Exp. Date	DO Lag	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Harrisburg	ESSEX HOMES	APF2017-00040	ESSEX HOMES	ESSEX HOMES	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Pending	Age Restricted		84	0	84				0	0	0	0	0	0	0	0
Concord	EUDY CONSTRUCTION	APF2017-00037	EUDY CONSTRUCTION	PHILIP EUDY	Concord High School	Concord Middle School	Weddington Hills Elementary School		Pending	Single Family		7	0	7				2,688	1,351	1,792	5,831	2,688	1,351	1,792	5,831
Harrisburg	FARMINGTON PATIO HOMES	APF2017-00011	FARMINGTON PATIO HOMES	ROCKY RIVER ROAD ASSOC LLC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Pending	Single Family		50	0	50				19.2	9.65	12.8	41.65	19.2	9.65	12.8	41.65
Harrisburg	FARMINGTON RIDGE	APF2008-00095	FARMINGTON RIDGE	HINSHAW-PEARSON	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	9/27/2006	137	136	1	8/21/2001	1/1/2012		52,608	26,441	35,072	114,121	0,384	0,193	0,256	0,833
Harrisburg	FARMINGTON TOWNHOMES	APF2017-00010	FARMINGTON TOWNHOMES	ROCKY RIVER ROAD ASSOC LLC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Pending	Townhouse		190	0	190				26.22	13.11	17.48	56.81	26.22	13.11	17.48	56.81
Harrisburg	FENTON DELL	APF2008-00080	FENTON DELL	CF LITTLE DEVELOPMENT CORPORATION	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	11/24/2020	95	86	9	9/20/2004	5/15/2014		36.48	18.335	24.32	79.135	3.456	1.737	2.304	7.497
Harrisburg	FENTON DELL PHASES 2 & 3	APF2008-00173	FENTON DELL PHASES 2 & 3	Little	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Active Platting	Single Family	11/23/2015	55	2	53	9/20/2004	5/29/2016		21.12	10.615	14.08	45.815	20,352	10,229	13,568	44,149
Cabarrus County	FIELDSTONE	APF2008-00086	FIELDSTONE	DAVID MCDONALD	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		All Lots Platted	Single Family	9/18/2020	108	85	23	1/20/2005			41,472	20,844	27,648	89,964	8,832	4,439	5,888	19,159
Concord	FLOWES-ZION CONCEPTUAL SITE PLAN SFD	APF2019-00030	FLOWES-ZION CONCEPTUAL SITE PLAN SFD	MARK EISENBEIS	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending			382	0	382				0	0	0	0	88,624	44,312	59,21	192,146
Concord	FLOWES-ZION CONCEPTUAL SITE PLAN TH	APF2019-00031	FLOWES-ZION CONCEPTUAL SITE PLAN TH	MARK EISENBEIS	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending			221	0	221				0	0	0	0	51,272	25,636	34,255	111,163
Kannapolis	FOREST PARK CROSSING	APF2010-00005	FOREST PARK CROSSING	Traci Dusenbury	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School	Kannapolis Intermediate School	Closed-Built Out	Multi Family	12/22/2010	56	56	0				12,992	6,496	8.68	28,168	0	0	0	0
Harrisburg	FOUNDERS RESERVE	APF2008-00131	FOUNDERS RESERVE	PARK STONE WEST, LLC	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Active Platting	Single Family	4/17/2017	43	44	-1		5/20/2015		16,512	8,299	11,008	35,819	-0,384	-0,193	-0,256	-0,833
Harrisburg	FOUNDERS RESERVE PHASE 2	APF2014-00006	FOUNDERS RESERVE PHASE 2	RYAND HOMES	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Active Building Permitting	Single Family	9/22/2016	15	7	8				5.76	2,895	3.84	12,495	3,072	1,544	2,048	6,664
Midland	FOX CREEK	APF2017-00001	FOX CREEK	B & C Land Holdings	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Active Platting	Single Family	8/19/2020	207	204	3				79,488	39,951	52,992	172,431	1,152	0,579	0,768	2,499
Harrisburg	FRANCES HAVEN	APF2008-00038	FRANCES HAVEN	ALBIZA FORTUNE BUILDERS INC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		All Lots Platted	Single Family	3/20/2019	20	19	1	9/19/2006	1/1/2013		7.68	3.86	5.12	16.66	0,384	0,193	0,256	0,833
Cabarrus County	FRAZIER ACRES	APF2008-00156	FRAZIER ACRES	JIMMY FRAZIER	Cox Mill High School	Harris Road Middle School	Charles A Boger Elementary School		Closed-Built Out	Single Family	8/20/2002	67	1	66				25,728	12,931	17,152	55,811	25,344	12,738	16,896	54,978
Concord	FRYE TRACTS	APF2019-00033	FRYE TRACTS	WILLIAM NIBLOCK	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending			118	0	118				0	0	0	0	27,376	13,688	18,29	59,354
Concord	FULLERTON PLACE	APF2008-00052	FULLERTON PLACE	LENNAR CAROLINAS, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (platting & permitting)	Single Family	2/4/2016	201	198	3	12/15/2005	5/17/2016		77,184	38,793	51,456	167,433	1,152	0,579	0,768	2,499
Cabarrus County	GLEN LAUREL	APF2008-00157	GLEN LAUREL	NO APPLICANT	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Active Building Permitting	Single Family	7/28/2014	260	5	255				99.84	50.18	66.56	216.58	97.92	49,215	65,28	212,415
Concord	GLENGROVE	APF2008-00050	GLENGROVE	UNKNOWN	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Closed-Built Out	Single Family	6/30/2014	325	198	127		6/8/2016		124.8	62,725	83.2	270,725	48,768	24,511	32,512	105,791
Locust	GLENWOOD AT THE VILLAGE OF RED BRIDGE	APF2008-00172	GLENWOOD AT THE VILLAGE OF RED BRIDGE	Mark Friedman	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Approved	Townhouse		741	0	741	3/1/2005			102,298	51,129	68,172	221,559	102,258	51,129	68,172	221,559
Kannapolis	GRACE'S RESERVE	APF2016-00025	GRACE'S RESERVE	EARNHARDT INTERCHANGE	Concord High School	Concord Middle School	Royal Oaks Elementary School		Active Building Permitting	Multi Family		200	0	200				46.4	23.2	31	100.6	46.4	23.2	31	100.6
Concord	GRANARY OAKS	APF2017-00006	GRANARY OAKS	Rick Jasinski	Northwest Cabarrus High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Single Family	2/1/2021	229	38	191				87,936	44,197	58,624	190,757	73,344	36,863	48,896	159,103
Kannapolis	GRAND SABANA	APF2008-00184	GRAND SABANA	Ejaili Hamid	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School	Kannapolis Intermediate School	Closed-Built Out	Single Family	10/14/2020	5	15	-10				1.92	0,965	1.28	4,165	-3.84	-1,93	-2.56	-8.33
Harrisburg	GRANTHAM	APF2015-00001	GRANTHAM	SOUTH CABARRUS CORPORATION	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active (platting & permitting)	Single Family	2/3/2021	275	171	104				105.6	53,075	70.4	229,075	39,936	20,072	26,624	86,632
Mt. Pleasant	GREEN ACRES	APF2017-00030	GREEN ACRES	GREEN ACRES REALTY LLC A NCLLC	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Construction Drawing Review	Single Family		38	0	38				14,592	7,334	9,728	31,654	14,592	7,334	9,728	31,654
Kannapolis	GREEN VIEW APARTMENTS	APF2021-00006	GREEN VIEW APARTMENTS	JAMES A FISHER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending			126	0	126				0	0	0	0	29,232	14,616	19,53	63,378
Concord	HACKBERRY PLACE	APF2008-00100	HACKBERRY PLACE	RICHARD GOODMAN	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Active Building Permitting	Single Family	6/13/2014	64	46	18	10/19/2004			24,576	12,352	16,384	53,312	6,912	3,474	4,608	14,994
Concord	HALLSTEAD	APF2008-00113	HALLSTEAD	CROSLAND LAND	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Approved	Single Family	2/7/2020	475	487	-12	11/18/2004	12/31/2015		182.4	91,675	121.6	395,675	-4,608	-2,316	-3,072	-9,996
Cabarrus County	HAMILTON	APF2008-00163	HAMILTON	Terry Bluto	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	7/16/2018	55	49	6	3/26/2001			21.12	10,615	14.08	45,815	2,304	1,158	1,536	4,998
Concord	HAMPDEN VILLAGE	APF2008-00053	HAMPDEN VILLAGE	METRO DEVELOPMENT GROUP, LLC	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School		Active (platting & permitting)	Single Family	9/13/2017	193	173	20	12/15/2005	12/14/2014		61,374	26,827	23,932	112,133	7.68	3.86	5.12	16.66
Concord	HARRIS ROAD SINGLE FAMILY ATTACHED SUBDIVISION	APF2017-00036	HARRIS ROAD SINGLE FAMILY ATTACHED SUBDIVISION	DONALD EDWARD	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Townhouse		90	0	90				12.42	6.21	8.28	26.91	12.42	6.21	8.28	26.91
Harrisburg	HARRISBURG TOWN CENTER	APF2008-00165	HARRISBURG TOWN CENTER	J&B Development Management, Inc.	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Closed-Built Out	Townhouse	9/12/2005	243	315	-72		9/15/2007		33,534	16,767	22,356	72,657	-9,936	-4,968	-6,624	-21,528
Harrisburg	HARRISBURG VILLAGE SINGLE FAMILY	APF2016-00003	HARRISBURG VILLAGE SINGLE FAMILY	LAMBERT RHONDA A	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Construction Drawing Review	Single Family		51	0	51				19,584	9,843	13,056	42,483	19,584	9,843	13,056	42,483
Harrisburg	HARRISBURG VILLAGE TOWNHOMES	APF2016-00002	HARRISBURG VILLAGE TOWNHOMES	LAMBERT RHONDA A	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Construction Drawing Review	Townhouse		207	0	207				28,566	14,283	19,044	61,893	28,566	14,283	19,044	61,893
Concord	HAVENBROOK	APF2008-00046	HAVENBROOK	unknown	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Closed-Built Out	Single Family	9/4/2007	225	224	1				86.4	43,425	57.6	187,425	0,384	0,193	0,256	0,833
Cabarrus County	HAWICK COMMONS	APF2008-00166	HAWICK COMMONS	The Mulvaney Group Ltd.	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Closed-Built Out	Single Family	12/12/2006	162	86	76				62,208	31,266	41,472	134,946	29,184	14,668	19,456	63,308
Cabarrus County	HAWKS RIDGE	APF2008-00055	HAWKS RIDGE	Randal Scribner	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Expired	Single Family		164	0	164	10/18/2007	10/17/2013		62,976	31,652	41,984	136,612	62,976	31,652	41,984	136,612
Harrisburg	HAWTHORNE	APF2008-00130	HAWTHORNE	KEVIN HALL, PE	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active Building Permitting	Single Family	3/4/2020	104	91	13	11/14/2008	6/9/2016		39,936	20,072	26,624	86,632	4,992	2,509	3,328	10,829
Kannapolis	HAWTHORNE AT THE GLEN	APF2016-00022	HAWTHORNE AT THE GLEN	JACO PROPERTIES INC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active Building Permitting	Multi Family		224	0	224				51,968	25,984	34.72	112,672	51,968	25,984	34.72	112,672
Concord	HEARTHWOOD	APF2008-00051	HEARTHWOOD	UNKNOWN	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Active Building Permitting	Single Family	8/18/2016	99	112	-13	7/15/2004	12/31/2015		31,482	13,761	12,276	57,519	-4,992	-2,509	-3,328	-10,829
Harrisburg	HEATHERSTONE	APF2008-00082	HEATHERSTONE	PARKER ORLEANS	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	5/19/2008	174	153	21	9/17/2001	7/26/2007		66,816	33,582	44,544	144,942	8,064	4,053	5,376	17,493
Concord	HENSLEY MIXED USE	APF2017-00033	HENSLEY MIXED USE	KEN ORNDORFF	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Townhouse		91	0	91				9,936	4,968	6,624	21,528	12,558	6,279	8,372	27,209
Kannapolis	HERITAGE OAKS ESTATES	APF2008-00162	HERITAGE OAKS ESTATES	NO APPLICANT	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pre APFO	Single Family		25	0	25				9.6	4,825	6.4	20,825	9.6	4,825	6.4	20,825
Concord	HERITAGE RIDGE AT MOSS CREEK	APF2016-00001	HERITAGE RIDGE AT MOSS CREEK	INAARA LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		In Progress	Single Family		84	0	84				32,256	16,212	21,504	69,972	32,256	16,212	21,504	69,972
Concord	HIGHLAND CREEK	APF2008-00147	HIGHLAND CREEK	Westbrook Highland Creek, LLC/Rhein	Cox Mill																				

Jurisdiction	Subdivision	APF Date	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	Units Approved	Units Issued	Units Remaining	Dev Order Approved	Exp. Date	DO Lag	Elementary Students	Middle Students	High School Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Kannapolis	KANNAPOLIS PARKWAY SITE SINGLE FAMILY		KANNAPOLIS PARKWAY SINGLE FAMILY	APF2016-0004	MCEACHERN LEONARD B JR	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family		166	0	166				63.744	32.038	42.496	138.278	63.744	32.038	42.496	138.278
Kannapolis	KANNAPOLIS PARKWAY SITE SINGLE FAMILY		KANNAPOLIS PARKWAY TOWNHOMES	APF2016-0005	MCEACHERN LEONARD B JR	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Townhouse		133	0	133				18.354	9.177	12.236	39.767	18.354	9.177	12.236	39.767
Concord	KASEN BLUFF		KASEN BLUFF	APF2008-00094	DARYL SUTHER	Concord High School	Concord Middle School	W M Irvin Elementary School		Expired	Single Family		12	0	12	4/17/2007	4/17/2013		4.608	2.316	3.072	9.996	4.608	2.316	3.072	9.996
Kannapolis	KELLSWATER BRIDGE		KELLSWATER BRIDGE	APF2008-00117	L-STAR	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (plating & permitting)	Single Family	1/27/2021	960	839	121	10/27/2011	10/27/2026		368.64	185.28	245.76	799.68	46.464	23.353	30.976	100.793
Kannapolis	KELLSWATER COMMON		KELLSWATER COMMON	APF2020-00013	OWEN REID	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Sketch			150	0	150				0	0	0	0	34.8	17.4	23.25	75.45
Kannapolis	KELLSWATER COMMONS TOWNHOMES		KELLSWATER COMMONS TOWNHOMES	APF2020-00038	REID OWEN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending			150	0	150				0	0	0	0	34.8	17.4	23.25	75.45
Harrisburg	KENSINGTON FOREST		KENSINGTON FOREST	APF2008-00102	NIBLOCK DEVELOPMENT CORP	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active Building Permitting	Single Family	8/7/2018	188	184	4	1/14/2006	12/17/2013		72.192	36.284	48.128	156.604	1.536	0.772	1.024	3.332
Concord	KENSLEY EAST		KENSLEY EAST	APF2020-00019	DONALD MURPHY	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending			13	0	13				0	0	0	0	3.016	1.508	2.015	6.539
Concord	LANSTONE		LANSTONE	APF2008-00093	UNKNOWN	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Closed-Built Out	Single Family	10/12/2015	39	35	4				14.976	7.527	9.984	32.487	1.536	0.772	1.024	3.332
Concord	LANTANA		LANTANA	APF2015-00004	RANKIN KIRKSEY C	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Single Family	12/7/2020	88	85	3				33.792	16.984	22.528	73.304	1.152	0.579	0.768	2.499
Concord	LAUREL PARK		LAUREL PARK	APF2008-00099	NIBLOCK DEVELOPMENT CORP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Active Building Permitting	Single Family	8/21/2019	709	690	19	12/31/2015			272.256	136.837	181.504	590.597	7.296	3.667	4.864	15.827
Concord	LEGACY CONCORD		LEGACY APARTMENTS	APF2014-00011	COBLE FAMILY FARM LTD PTNRSHIP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Active Building Permitting	Multi Family	3/27/2015	344	332	12				79.808	39.904	53.32	173.032	2.784	1.392	1.86	6.036
Harrisburg	LITCHFIELD VILLAGE		LITCHFIELD VILLAGE	APF2008-00125	LENNAR COMMUNITIES OF CHARLOTTE, IN	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	12/12/2011	150	161	-11	1/18/2005	9/14/2013		57.6	28.95	38.4	124.95	-4.224	-2.123	-2.816	-9.163
Concord	LITTLE TEXAS LLC		LITTLE TEXAS LLC	APF2008-00175	Matthew P. Jones	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Withdrawn	Single Family		224	0	224				86.016	43.232	57.344	186.592	86.016	43.232	57.344	186.592
Concord	LONGVIEW APARTMENTS		LONGVIEW APARTMENTS	APF2020-00029	CARRIE O'BRIEN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Wincoff Elementary School		Pending			2020	0	2020				0	0	0	0	468.64	234.32	313.1	1016.06
Concord	LOWER ROCKY RIVER ROAD PROPERTIES		LOWER ROCKY RIVER PROPERTIES	APF2019-00008	SARA SHIRLEY	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School		Sketch	Single Family		106	0	106				0	0	0	0	40.704	20.458	27.136	88.298
Concord	LUCKY DRIVE SITE		LUCKY DRIVE SITE	APF2018-00032	EDDIE MOORE	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family		0	0	0				0	0	0	0	0	0	0	0
Concord	LYNMERE		LYNMERE	APF2016-00017	OXFORD LAND SALES INC	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Single Family		117	0	117				44.928	22.581	29.952	97.461	44.928	22.581	29.952	97.461
Concord	MAGNOLIA CROSSING		MAGNOLIA CROSSING	APF2008-00079	UNKNOWN	Northwest Cabarrus High School	Wincoff Elementary School	Wincoff Elementary School		Closed-Built Out	Single Family	8/18/2020	44	37	7	5/12/2005	12/31/2013		13.992	6.116	5.456	25.564	2.688	1.351	1.792	5.831
Harrisburg	MAGNOLIA SPRINGS		MAGNOLIA SPRINGS	APF2008-00128	SATURDAY INVESTMENTS, LLC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	4/14/2008	190	190	0	6/19/2003	6/26/2012		72.96	36.67	48.64	158.27	0	0	0	0
Kannapolis	MAIN STREET		MAIN STREET	APF2020-00040	JOSHUA MASTERS	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending			6	0	6				0	0	0	0	1.392	0.696	0.93	3.018
Kannapolis	MALLARD POINTE ESTATES		MALLARD POINTE ESTATES	APF2014-00016	UNKNOWN	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School	Kannapolis Intermediate School	All Lots Platted	Single Family	7/28/2016	215	158	57				82.56	41.495	55.04	179.095	21.888	11.001	14.592	47.481
Kannapolis	MANCHESTER PLACE		MANCHESTER PLACE	APF2013-00010	DANNY G BOST LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Wincoff Elementary School		Closed-Built Out	Single Family	5/31/2007	162	86	76				62.208	31.266	41.472	134.946	29.184	14.668	19.456	63.308
Concord	MANOR AVENUE SUBDIVISION		MANOR AVENUE SUBDIVISION	APF2020-00035	RICK BURRAGE	Concord High School	Concord Middle School	R Brown McAllister Elementary School		Pending			8	0	8				0	0	0	0	1.856	0.928	1.24	4.024
Concord	MARDAN X LLC		MARDAN X LLC	APF2008-00169	Mark McCormick	Concord High School	Concord Middle School	Weddington Hills Elementary School		Expired	Multi Family		168	0	168				38.976	19.488	26.04	84.504	38.976	19.488	26.04	84.504
Concord	MCGRAW PROPERTY		MCGRAW PROPERTY	APF2008-00064	UNKNOWN	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		In Progress	Single Family		54	0	54	10/16/2007	10/16/2015		20.736	10.422	13.824	44.982	20.736	10.422	13.824	44.982
Kannapolis	MEADOW CREEK APARTMENTS		MEADOW CREEK APARTMENTS	APF2008-00116	FLORIAN GHITAS	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Wincoff Elementary School		Closed-Built Out	Multi Family	8/25/2008	14	14	0	6/26/2008			3.248	1.624	2.17	7.042	0	0	0	0
Locust	MEADOW CREEK VILLAGE		MEADOW CREEK VILLAGE	APF2013-00009	RL REGI NORTH CAROLINA LLC	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		Active Building Permitting	Single Family	12/2/2016	140	104	36				53.76	27.02	35.84	116.62	13.824	6.948	9.216	29.988
Concord	MEETING STREET HOMES PHASE 2		MEETING STREET HOMES PHASE 2	APF2018-00024	AMICUS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse		66	0	66				9.108	4.554	6.072	19.734	9.108	4.554	6.072	19.734
Concord	MEETING STREET HOMES PHASE 3		MEETING STREET HOMES PHASE 3	APF2018-00025	AMICUS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse		66	0	66				9.108	4.554	6.072	19.734	9.108	4.554	6.072	19.734
Concord	MEETING STREET HOMES PHASE 1		MEETING STRET HOMES PHASE 1	APF2018-00023	AMICUS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Multi Family		296	0	296				68.672	34.336	45.88	148.888	68.672	34.336	45.88	148.888
Concord	MERIDIAN		MERIDIAN	APF2008-00081	GUADALUPE JAVIER ZANDATE	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Active Building Permitting	Single Family	1/25/2017	16	17	-1	9/19/2006			6.144	3.088	4.096	13.328	-0.384	-0.193	-0.256	-0.833
Kannapolis	MILLBROOKE		MILLBROOKE	APF2008-00114	GANDY COMMUNITIES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Inactive	Single Family		128	0	128	4/6/2008	4/6/2012		49.152	24.704	32.768	106.624	49.152	24.704	32.768	106.624
Concord	MILLGROVE		MILLGROVE	APF2021-00002	FRED MATRULLI	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending			136	0	136				0	0	0	0	31.552	15.776	21.08	68.408
Cabarrus County	MOORECREST		MOORECREST	APF2008-00110	Dockside Development	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	6/14/2006	92	93	-1	1/27/2003			35.328	17.756	23.552	76.636	-0.384	-0.193	-0.256	-0.833
Kannapolis	MOOSE MEADOWS (ROWAN COUNTY)		MOOSE MEADOWS (ROWAN COUNTY)	APF2017-00002	TIMOTHY TALLENT	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School	Kannapolis Intermediate School	Pending	Single Family		45	0	45				17.28	8.685	11.52	37.485	17.28	8.685	11.52	37.485
Concord	MORRISON RIDGE - MULTI-FAMILY		MORRISON RIDGE - MULTI-FAMILY	APF2020-00032	PULTE	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending			224	0	224				0	0	0	0	51.968	25.984	34.72	112.672
Concord	MORRISON RIDGE - SINGLE FAMILY		MORRISON RIDGE - SINGLE FAMILY ATTACHED	APF2020-00031	PULTE	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending			90	0	90				0	0	0	0	20.88	10.44	13.95	45.27
Concord	MORRISON RIDGE - SINGLE FAMILY DETACHED		MORRISON RIDGE - SINGLE FAMILY DETACHED	APF2020-00030	PULTE	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending			150	0	150				0	0	0	0	34.8	17.4	23.25	75.45
Concord	MOSS CREEK		MOSS CREEK	APF2008-00083	ROBERT W. BURKETT	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	3/20/2012	1400	1205	195	1/20/2000			537.6	270.2	358.4	1166.2	74.88	37.635	49.92	162.435
Concord	MOSS CREEK TOWNHOMES		MOSS CREEK TOWNHOMES	APF2008-00103	J & B DEVELOPMENT AND MANAGEMENT, INC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse		88	0	88	1/20/2000			12.006	6.003	8.004	26.013	12.144	6.072	8.096	26.312
Cabarrus County	MOUNT OLIVE ESTATES		MOUNT OLIVE ESTATES	APF2008-00146	Bryant Parnell	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Closed-Built Out	Single Family	7/6/2006	10	11	-1	1/28/2002			3.84	1.93	2.56	8.33	-0.384	-0.193	-0.256	-0.833
Concord	MOUNTAIN BROOK PHASE 6		MOUNTAIN BROOK PHASE 6	APF2008-00084	MDP CUSTOM HOMES, INC	Concord High School	Concord Middle School	W M Irvin Elementary School		Expired	Single Family	1/31/2019	8	4	4	12/12/2006			3.072	1.544	2.048	6.664	1.536	0.772	1.024	3.332
Concord	MOUNTAIN LAUREL		MOUNTAIN LAUREL	APF2008-00096	BEAZER HOMES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Closed-Built Out	Single Family	9/9/2013	76	78	-2	10/19/2004			29.184	14.688	19.456	63.308	-0.768	-0.386	-0.512	-1.666
Mt. Pleasant	MP DEVELOPMENT PARTNERS		MP DEVELOPMENT PARTNERS	APF2020-00022	MP DEVELOPMENT PARTNERS	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Pending			34	0	34				0	0	0	0	7.888	3.944	5.27	17.102
Mt. Pleasant	NEUENBERG		NEUENBERG	APF2018-00018	MEL THOMPSON	Mt Pleasant High School	Mt Pleasant Middle School																			

Jurisdiction	Subdivision	APF Base	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	Units Approved	Units Issued	Units Remaining	Dev Order Approved	Exp. Date	DO Last	Elementary Students	Middle Students	High School Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Cabarrus County	PARKWAY COMMONS PEACH ORCHARD	PEACH ORCHARD ESTATES	APF2008-00118	AMERICAN DEVELOPMENT INDUSTRIES, INC HAYDEN McMAHON DEVELOPMENT INC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School			Inactive	Multi Family		532	0	532	5/23/2007	10/27/2013	123.424	61.712	82.46	267.596	123.424	61.712	82.46	267.596	
Kannapolis	PELHEM POINTE	PELHEM POINTE	APF2008-00041	Ryland Homes	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School			In Progress	Single Family	10/23/2015	113	103	10	3/17/2008	9/15/2013	43.392	21.809	28.928	94.129	3.84	1.93	2.56	8.33	
Concord	PENDLETON MULTI-FAMILY UNITS	PENDLETON MULTI-FAMILY UNITS	APF2010-00002	PENDLETON / CONCORD PARTNER, LLC	Concord High School	Concord Middle School	W M Irvin Elementary School			Active (plating & permitting)	Multi Family	4/30/2018	90	32	58		12/31/2013	20.88	10.44	13.95	45.27	13.456	6.728	8.99	29.174	
Concord	PENDLETON SINGLE FAMILY UNITS	PENDLETON SINGLE FAMILY UNITS	APF2008-00069	PENDLETON / CONCORD PARTNER, LLC	Concord High School	Concord Middle School	W M Irvin Elementary School			Active (plating & permitting)	Single Family	7/14/2020	88	117	-29	5/15/2007	12/31/2013	33.792	16.984	22.528	73.304	-11.136	-5.597	-7.424	-24.157	
Harrisburg	PHARR MILL NEIGHBORHOOD	PHARR MILL NEIGHBORHOOD	APF2019-00022	DPR ASSOCIATES	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School			Pending			0	0	0			0	0	0	0	0	0	0	0	0
Kannapolis	PIEDMONT CONCORD LAKE	PIEDMONT CONCORD LAKE	APF2009-00009	Jason Oesterreich	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School	Kannapolis Intermediate School		Inactive	Multi Family		400	0	400		6/22/2014	92.8	46.4	62	201.2	92.8	46.4	62	201.2	
Kannapolis	PIEDMONT CONCORD LAKE	PIEDMONT CONCORD LAKE	APF2014-00012	Jason Oesterreich	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School	Kannapolis Intermediate School		Inactive	Multi Family		120	0	120		6/22/2014	27.84	13.92	18.6	60.36	27.84	13.92	18.6	60.36	
Kannapolis	PIEDMONT CONCORD LAKE	PIEDMONT CONCORD LAKE	APF2013-00008	PINE CREEK DEVELOPERS LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School			Inactive	Single Family	10/25/2019	58	29	29			22.272	11.194	14.848	48.314	11.136	5.597	7.424	24.157	
Concord	PINE CREEK	PINE CREEK	APF2018-00022	PETER TATGE	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School			Pending	Single Family		319	0	319			122.496	61.567	81.664	265.727	122.496	61.567	81.664	265.727	
Concord	PIPER LANDING SFA	PIPER LANDING SFA	APF2019-00034	CHRIS TODD	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School			Pending			268	0	268			0	0	0	0	62.176	31.088	41.54	134.804	
Concord	PIPER LANDING SFD	PIPER LANDING SFD	APF2019-00024	JEREMY HORTON	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School			Pending			66	0	66			0	0	0	0	15.312	7.656	10.23	33.198	
Concord	PITTS SCHOOL ROAD	PITTS SCHOOL ROAD DEVELOPMENT - MULTIFAMILY	APF2020-00009	EDWIN SUDDRETH	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School			Pending			300	0	300			0	0	0	0	69.6	34.8	46.5	150.9	
Concord	PITTS SCHOOL ROAD	PITTS SCHOOL ROAD DEVELOPMENT - SINGLE FAMILY DETACHED	APF2020-00008	EDWIN SUDDRETH	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School			Pending			182	0	182			0	0	0	0	42.224	21.112	28.21	91.546	
Concord	PITTS SCHOOL ROAD	PITTS SCHOOL ROAD SUBDIVISION	APF2017-00034	MATTHEW McWILLIAMS	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School			Pending	Single Family		29	0	29			18.816	9.457	12.544	40.817	11.136	5.597	7.424	24.157	
Concord	PLEASANT OAKS	PLEASANT OAKS	APF2008-00047	KISER DEVELOPMENT COMPANY	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School			Active (plating & permitting)	Single Family	10/12/2020	170	160	10	2/21/2005	8/17/2015	65.28	32.81	43.52	141.61	3.84	1.93	2.56	8.33	
Concord	POPLAR COVE	POPLAR COVE	APF2016-00016	Workforce Homestead, Inc	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School			Active Platting	Single Family	8/10/2020	23	21	2			8.832	4.439	5.888	19.159	0.768	0.386	0.512	1.666	
Concord	POPLAR CROSSING COMMONS	POPLAR CROSSING COMMONS ADULT LIVING CENTER	APF2012-00003	Workforce Homestead, Inc	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School			Age Restricted Development	Age Restricted		66	0	66			9.9	3.63	4.752	18.282	0	0	0	0	
Concord	POPLAR POINT TOWNHOMES	POPLAR POINT TOWNHOMES	APF2017-00032	JEFF REASNOR	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School			Pending	Townhouse	5/20/2020	36	30	6			4.968	2.484	3.312	10.764	0.828	0.414	0.552	1.794	
Concord	POPLAR TENT OAKS	POPLAR TENT OAKS	APF2016-00019	Fred Matrulli	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School			Pending	Single Family	1/4/2021	93	41	52			35.712	17.949	23.808	77.469	19.968	10.036	13.312	43.316	
Concord	POPLAR TENT SINGLE FAMILY	POPLAR TENT SINGLE FAMILY	APF2020-00024	CITY OF CONCORD	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School			Pending			20	0	20			0	0	0	0	4.64	2.32	3.1	10.06	
Cabarrus County	PORTERS LANDING	PORTERS LANDING	APF2008-00057	NO APPLICANT	Hickory Ridge High School	Hickory Ridge Middle School	Bethel Elementary School			Closed-Built Out	Single Family	9/18/2017	94	195	-101	4/19/1999		36.096	18.142	24.064	78.302	-38.784	-19.493	-25.856	-84.133	
Concord	PRESPRO CUSTOM HOMES	PRESPRO CUSTOM HOMES	APF2019-00013	PAUL CAMPBELL	Concord High School	Concord Middle School	W M Irvin Elementary School			Pending	Single Family		30	0	30			11.52	5.79	7.68	24.99	11.52	5.79	7.68	24.99	
Concord	PRESPRO FLOWES STORE	PRESPRO FLOWES STORE	APF2017-00025	PRESPRO	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School			Pending	Single Family		122	0	122			47.616	23.932	31.744	103.292	46.848	23.546	31.232	101.626	
Harrisburg	PROVIDENCE MANOR	PROVIDENCE MANOR	APF2008-00106	L & R DEVELOPMENT, LLC	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School			Closed-Built Out	Single Family	3/22/2007	149	57	92	12/15/2003	12/29/2007	57.216	28.757	38.144	124.117	35.328	17.756	23.552	76.636	
Concord	PROVINCE	PROVINCE GREEN	APF2008-00074	UNKNOWN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School			Closed-Built Out	Single Family	7/14/2015	61	51	10			23.424	11.773	15.616	50.813	3.84	1.93	2.56	8.33	
Concord	THE MILLS AT ROCKY RIVER SINGLE FAMILY UNITS	THE MILLS AT ROCKY RIVER SINGLE FAMILY UNITS	APF2008-00151	Grace Development LLC	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School			Active (plating & permitting)	Single Family	1/29/2021	853	797	56	12/15/2005	7/12/2016	327.552	164.629	218.368	710.549	21.504	10.808	14.336	46.648	
Concord	RAMSGATE	RAMSGATE	APF2008-00070	UNKNKNOWN	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School			Expired	Single Family	11/8/2017	224	241	-17			86.016	43.232	57.344	186.592	-6.528	-3.281	-4.352	-14.161	
Kannapolis	RED CEDAR LANDING	RED CEDAR LANDING	APF2014-00017	REO FUNDING SOLUTIONS III LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School			Pending	Multi Family		150	0	150	10/1/2014		34.8	17.4	23.25	75.45	34.8	17.4	23.25	75.45	
Kannapolis	RED DIRT PROPERTIES TOWNHOMES	RED DIRT PROPERTIES TOWNHOMES	APF2020-00037	KANDIE LABERT	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Wincoff Elementary School			Pending			48	0	48			0	0	0	0	11.136	5.568	7.44	24.144	
Kannapolis	REDWOOD APARTMENT NEIGHBORHOOD	REDWOOD APARTMENT NEIGHBORHOOD	APF2021-00004	BOB DYER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School			Pending			78	0	78			0	0	0	0	18.096	9.048	12.09	39.234	
Kannapolis	REDWOOD KANNAPOLIS PARKWAY	REDWOOD KANNAPOLIS PARKWAY	APF2020-00002	BOB DYER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School			Pending			166	0	166			0	0	0	0	38.512	19.256	25.73	83.498	
Concord	RIDGES AT CONCORD	RIDGES AT CONCORD	APF2008-00072	QUAIL HAVEN DEVELOPMENT	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School			Pending	Single Family		551	0	551	4/18/2006	12/31/2010	211.584	106.343	141.056	458.983	211.584	106.343	141.056	458.983	
Kannapolis	RIVER POINTE AT DAVIDSON	RIVER POINTE AT DAVIDSON	APF2013-00014	Wayne Patrick Holdings, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School			Pending	Single Family		444	0	444	9/4/2013		170.496	85.692	113.664	369.852	170.496	85.692	113.664	369.852	
Cabarrus County	RIVERBEND	RIVERBEND	APF2008-00078	GREATHORN PROPERTIES	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School			Approved	Single Family		28	0	28	12/20/2007	12/19/2013	10.752	5.404	7.168	23.324	10.752	5.404	7.168	23.324	
Concord	RIVERWALK	RIVERWALK	APF2008-00044	unknown	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School			Closed-Built Out	Single Family	8/2/2019	488	529	-41			187.392	94.184	124.928	406.504	-15.744	-7.913	-10.496	-34.153	
Concord	ROBERTA CROSSING	ROBERTA CROSSING	APF2014-00003	LIVE WELL HOMES	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School			Active Building Permitting	Single Family	7/27/2015	55	1	54	5/20/2016		21.12	10.615	14.08	45.815	20.736	10.422	13.824	44.982	
Concord	ROBERTA MEADOWS	ROBERTA MEADOWS	APF2008-00075	PITTS SCHOOL, LLC / TIM HUNTLEY	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School			Approved	Single Family	1/13/2021	33	31	2	6/20/2006	6/20/2012	12.672	6.369	8.448	27.489	0.768	0.386	0.512	1.666	
Concord	ROBERTA RIDGE SUBDIVISION	ROBERTA RIDGE SUBDIVISION	APF2016-00007	BLACKWELDER FANNIE B	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School			Active Platting	Single Family	9/24/2020	206	198	8			79.104	39.758	52.736	171.598	3.072	1.544	2.048	6.664	
Concord	ROBERTA ROAD TOWNHOMES	ROBERTA ROAD TOWNHOMES	APF2019-00011	JONATHAN CARTER	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School			Pending	Townhouse	8/18/2020	16	3	13			2.208	1.104	1.472	4.784	1.794	0.897	1.196	3.887	
Concord	ROCKLAND CIRCLE TOWNHOMES	ROCKLAND CIRCLE TOWNHOMES	APF2020-00020	SARA SHIRLEY	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School			Pending			74	0	74			0	0	0	0	17.168	8.584	11.47	37.222	
Cabarrus County	ROCKY GLEN	ROCKY GLEN	APF2008-00077	RANDALL SCRIBNER	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School			Expired	Single Family		49	0	49	7/19/2007	7/18/2013	18.816	9.457	12.544	40.817	18.816	9.457	12.544	40.817	
Cabarrus County	ROCKY MEADOWS	ROCKY MEADOWS	APF2008-00164	Randy Humphrey and Associates	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School			Closed-Built Out	Single Family	6/4/2004	142	144	-2	1/15/1999		54.528	27.406	36.352	118.286	-0.768	-0.386	-0.512	-1.666	
Concord	ROCKY RIVER ESTATES PH 1	ROCKY RIVER ESTATES PH 1	APF2017-00005	DEVELOPMENT SOLUTIONS GROUP	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School			Pending	Single Family		56	0	56			21.504	10.808	14.336	46.648	21.504	10.808	14.336	46.648	
Kannapolis	ROGERS LAKE ROAD	ROGERS LAKE ROAD TOWNHOMES	APF2017-00021	JOURNEY CAPITAL LLC	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School			Pending	Townhouse		0	0	0			0	0	0	0	0	0	0	0	
Kannapolis	ROY CHATHAM MINOR SUBDIVISION	ROY CHATHAM MINOR SUBDIVISION	APF2017-00022	ROY CHATHAM	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School			Pending		11/16/2018	8	3	5			0	0	0	0	1.16	0.58	0.775	2.515	
Concord	ROYSCROFT	ROYSCROFT	APF2008-00073	PROVIDENT DEVELOPMENT GROUP	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School			Active Platting	Single Family		0	0	0	3/1										

Jurisdiction	Subdivision	APF Base	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	Units Approved	Units Issued	Units Remaining	Dev Order Approved	DO Lag Expiration	Elementary Students	Middle Students	High School Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Concord	SAVANNAH COMMONS	SELLERS PROPERTY	SELLERS PROPERTY	APF2008-00049	LANDMARK DEVELOPMENT VENTURES, LLC BRANDY SELLERS	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Active Building Permitting	Single Family	8/27/2013	28	29	-1	12/21/2004		10.752	5.404	7.168	23.324	-0.384	-0.193	-0.256	-0.833
Kannapolis	SAVANNAH COMMONS	SELLERS PROPERTY	SELLERS PROPERTY	APF2020-00021	LANDMARK DEVELOPMENT VENTURES, LLC BRANDY SELLERS	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Pending	Single Family		7	0	7			0	0	0	0	1.624	0.812	1.085	3.521
Concord	SETTLERS RIDGE	SETTLERS RIDGE	SETTLERS RIDGE	APF2008-00179	Coddle Creek Development Group, LLC	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Active (plating & permitting)	Townhouse	11/21/2017	116	125	-9	1/15/2008	3/29/2015	16.008	8.004	10.672	34.684	-1.242	-0.621	-0.828	-2.691
Kannapolis	SETTLERS RIDGE	SETTLERS RIDGE	SETTLERS RIDGE	APF2008-00108	Craft/CP Morgan	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		All Lots Platted	Single Family	1/14/2011	150	138	12	1/7/2004		57.6	28.95	38.4	124.95	4.608	2.316	3.072	9.996
Kannapolis	SHERWOOD DEVELOPMENT	SHERWOOD DEVELOPMENT	SHERWOOD DEVELOPMENT	APF2018-00014	BLOC DESIGN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family		91	0	91			0	0	0	0	21.112	10.556	14.105	45.773
Kannapolis	SHILOH VILLAGE	SHILOH VILLAGE	SHILOH VILLAGE	APF2008-00071	SHILOH RIDGE DEVELOPMENT, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	5/25/2011	30	30	0	6/19/2006		11.52	5.79	7.68	24.99	0	0	0	0
Locust	SHILOH VILLAGE	SHILOH VILLAGE	SHILOH VILLAGE	APF2009-00007	CHRIS HUNTER	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Pending	Single Family		70	0	70	1/8/2008		26.88	13.51	17.92	58.31	26.88	13.51	17.92	58.31
Cabarrus County	SKYBROOK	SKYBROOK	SKYBROOK	APF2008-00104	MVC, LLC/Bryan Properties	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	Single Family	2/23/2018	254	388	-134	12/17/1998		97.536	49.022	65.024	211.582	-51.456	-25.862	-34.304	-111.622
Cabarrus County	SKYBROOK	SKYBROOK	SKYBROOK	APF2017-00014	JIM GRDICH	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Issued	Multi Family	4/6/2017	268	280	-12			62.176	31.088	41.54	134.804	-2.784	-1.392	-1.86	-6.036
Mt. Pleasant	SOUTH SKYLAND TOWNHOMES	SOUTH SKYLAND TOWNHOMES	SOUTH SKYLAND TOWNHOMES	APF2018-00017	RONALD BURRAGE	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Withdrawn			16	0	16			0	0	0	0	3.712	1.856	2.48	8.048
Kannapolis	SOUTH VILLAGE SINGLE FAMILY	SOUTH VILLAGE SINGLE FAMILY	SOUTH VILLAGE SINGLE FAMILY	APF2009-00001	Richard McGinnis	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School	Kannapolis Intermediate School	Inactive	Single Family		15	0	15		8/8/2012	5.76	2.895	3.84	12.495	5.76	2.895	3.84	12.495
Kannapolis	SOUTH VILLAGE TOWNHOMES	SOUTH VILLAGE TOWNHOMES	SOUTH VILLAGE TOWNHOMES	APF2009-00002	Richard McGinnis	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School	Kannapolis Intermediate School	Inactive	Townhouse		145	0	145		8/8/2012	20.01	10.005	13.34	43.355	20.01	10.005	13.34	43.355
Concord	SOUTHWOOD REALTY APTS	SOUTHWOOD REALTY APTS	SOUTHWOOD REALTY APTS	APF2019-00023	WILLIAM RATCHFORD	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending			0	0	0			0	0	0	0	0	0	0	0
Concord	SPRING MEADOW	SPRING MEADOW	SPRING MEADOW	APF2017-00041	BOYD STANLEY	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending	Single Family		169	0	169			44.16	22.195	29.44	95.795	64.896	32.617	43.264	140.777
Concord	ST ANDREWS PHASE 7	ST ANDREWS PHASE 7	ST ANDREWS PHASE 7	APF2008-00105	Danny Bost T.W.L.S. Inc.	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Approved	Single Family	12/30/2014	32	5	27	11/19/2001		12.288	6.176	8.192	26.656	10.368	5.211	6.912	22.491
Cabarrus County	ST ANDREWS PLACE	ST ANDREWS PLACE	ST ANDREWS PLACE	APF2013-00003	twls, inc	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Closed-Built Out	Single Family	3/21/2014	516	238	278			198.144	99.588	132.096	429.828	106.752	53.654	71.168	231.574
Harrisburg	STALLINGS FARM	STALLINGS FARM	STALLINGS FARM	APF2008-00037	JOE M STALLINGS ET. AL.	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	12/29/2014	21	48	-27		4/18/2004	8.064	4.053	5.376	17.493	-10.368	-5.211	-6.912	-22.491
Harrisburg	STALLINGS FARM PHASE 5	STALLINGS FARM PHASE 5	STALLINGS FARM PHASE 5	APF2008-00126	VERNON BURRIS	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	7/31/2013	35	26	9	6/21/2004	12/22/2007	13.44	6.755	8.96	29.155	3.456	1.737	2.304	7.497
Cabarrus County	STALLINGS GLEN	STALLINGS GLEN	STALLINGS GLEN	APF2010-00004	CHRISTOPHER PROPERTIES	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	8/1/2019	29	67	-38			11.136	5.597	7.424	24.157	-14.592	-7.334	-9.728	-31.654
Harrisburg	STALLINGS ROAD	STALLINGS ROAD	STALLINGS ROAD	APF2018-00013	ROBERT W NIXON	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Age Restricted Development	Single Family		191	0	191			73.344	36.863	48.896	159.103	73.344	36.863	48.896	159.103
Kannapolis	STONEWOOD TOWNHOMES	STONEWOOD TOWNHOMES	STONEWOOD TOWNHOMES	APF2017-00035	COLE JENEST & STONE	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Townhouse		22	0	22			3.036	1.518	2.024	6.578	3.036	1.518	2.024	6.578
Cabarrus County	SUGAR HILL SUBDIVISION	SUGAR HILL SUBDIVISION	SUGAR HILL SUBDIVISION	APF2014-00010	JBR CUSTOM HOMES INC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		In Progress	Single Family		9	0	9	11/12/2014	11/12/2016	3.456	1.737	2.304	7.497	3.456	1.737	2.304	7.497
Kannapolis	SUMMERLYN VILLAGE - SINGLE FAMILY ATTACHED	SUMMERLYN VILLAGE - SINGLE FAMILY ATTACHED	SUMMERLYN VILLAGE - SINGLE FAMILY ATTACHED	APF2020-00007	MATT PANNELL	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending			152	0	152			0	0	0	0	35.264	17.632	23.56	76.456
Kannapolis	SUMMERLYN VILLAGE - SINGLE FAMILY DETACHED	SUMMERLYN VILLAGE - SINGLE FAMILY DETACHED	SUMMERLYN VILLAGE - SINGLE FAMILY DETACHED	APF2020-00006	MATT PANNELL	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending			220	0	220			0	0	0	0	51.04	25.52	34.1	110.66
Kannapolis	SUMMERS WALK	SUMMERS WALK	SUMMERS WALK	APF2009-00006	FC SUMMERS WALK LLC A NC LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		In Progress	Single Family	12/10/2020	99	4	95	1/27/2014		38.016	19.107	25.344	82.467	36.48	18.335	24.32	79.135
Concord	HUNTON FOREST	TAYLOR MORRISON OF CAROLINAS, INC	TAYLOR MORRISON OF CAROLINAS, INC	APF2017-00009	Steven Wilson	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family	2/11/2021	361	297	64			138.624	69.673	92.416	300.713	24.576	12.352	16.384	53.312
Concord	THE ARBORS	THE ARBORS	THE ARBORS	APF2019-00028	GINGER MOORE	Concord High School	Concord Middle School	R Brown McAllister Elementary School		Pending			22	0	22			0	0	0	0	5.104	2.552	3.41	11.066
Cabarrus County	THE BLUFFS AT MILL BRIDGE	THE BLUFFS AT MILL BRIDGE	THE BLUFFS AT MILL BRIDGE	APF2008-00076	HARTSELL BROTHERS	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		All Lots Platted	Single Family	9/19/2019	20	11	9	5/18/2006	5/17/2012	7.68	3.86	5.12	16.66	3.456	1.737	2.304	7.497
Cabarrus County	THE ENCLAVE AT TIMBER RIDGE	THE ENCLAVE AT TIMBER RIDGE	THE ENCLAVE AT TIMBER RIDGE	APF2008-00109	Metrolina Development Corp.	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		All Lots Platted	Single Family	12/9/2019	21	15	6	8/18/2005		8.064	4.053	5.376	17.493	2.304	1.158	1.536	4.998
Kannapolis	THE FALLS (ROWAN COUNTY)	THE FALLS (ROWAN COUNTY)	THE FALLS (ROWAN COUNTY)	APF2017-00004	B & C LAND HOLDINGS	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School		Active (plating & permitting)	Single Family	1/20/2021	203	144	59			77.952	39.179	51.968	169.099	22.656	11.387	15.104	49.147
Kannapolis	THE FARM AT RIVERPOINTE	THE FARM AT RIVERPOINTE	THE FARM AT RIVERPOINTE	APF2008-00152	Wayne Patrick Holdings, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (plating & permitting)	Single Family	4/13/2016	805	438	367	10/18/1999	1/21/2016	309.12	155.365	206.08	670.565	140.928	70.831	93.952	305.711
Kannapolis	THE GRAND	THE GRAND	THE GRAND	APF2008-00112	MCCLAIN, BARR & ASSOCIATES, SCOTT NEELY AND STEVE NICK PARKER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	Multi Family	1/30/2009	240	258	-18	2/7/2007		55.68	27.84	37.2	120.72	-4.176	-2.088	-2.79	-9.054
Concord	THE MILLS AT ROCKY RIVER - MULTIFAMILY	THE MILLS AT ROCKY RIVER - MULTIFAMILY	THE MILLS AT ROCKY RIVER - MULTIFAMILY	APF2019-00001	NICK PARKER	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School		Pending	Multi Family	8/24/2015	300	8	292			69.6	34.8	46.5	150.9	67.744	33.872	45.26	146.876
Concord	THE MILLS AT ROCKY RIVER - TOWNHOMES	THE MILLS AT ROCKY RIVER - TOWNHOMES	THE MILLS AT ROCKY RIVER - TOWNHOMES	APF2019-00002	NICK PARKER	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School		Pending	Townhouse		125	0	125			17.25	8.625	11.5	37.375	17.25	8.625	11.5	37.375
Concord	THE MILLS AT ROCKY RIVER MULTI FAMILY UNITS	THE MILLS AT ROCKY RIVER MULTI FAMILY UNITS	THE MILLS AT ROCKY RIVER MULTI FAMILY UNITS	APF2010-00003	Grace Development LLC	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School		Expired	Multi Family	4/15/2014	347	2	345		7/12/2016	80.504	40.252	53.785	174.541	80.04	40.02	53.475	173.535
Concord	THE POINTE AT SAINT ANDREWS	THE POINTE AT SAINT ANDREWS	THE POINTE AT SAINT ANDREWS	APF2008-00068	DANNY G BOST	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Closed-Built Out	Single Family	6/3/2013	42	43	-1	1/18/2007	1/17/2013	16.128	8.106	10.752	34.986	-0.384	-0.193	-0.256	-0.833
Concord	THE SEASONS AT POPLAR TENT	THE SEASONS AT POPLAR TENT	THE SEASONS AT POPLAR TENT	APF2015-00002	PANARA JAYSUKHLAL V	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Active Building Permitting	Multi Family	11/21/2016	264	144	120			61.248	30.624	40.92	132.792	27.84	13.92	18.6	60.36
Harrisburg	THE SLOOP ESTATES AT ROCKY RIVER CROSSING	THE SLOOP ESTATES AT ROCKY RIVER CROSSING	THE SLOOP ESTATES AT ROCKY RIVER CROSSING	APF2008-00123	MILDRED S. McMANUS	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Closed-Built Out	Single Family		16	0	16		5/22/2005	6.144	3.088	4.096	13.328	6.144	3.088	4.096	13.328
Concord	THE STATION AT POPLAR TENT	THE STATION AT POPLAR TENT	THE STATION AT POPLAR TENT	APF2008-00182	Tom McClellan	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		In Progress	Multi Family	4/28/2016	312	312	0			72.384	36.192	48.36	156.936	0	0	0	0
Locust	THE VILLAGE AT REDBRIDGE TOWNHOMES	THE VILLAGE AT REDBRIDGE TOWNHOMES	THE VILLAGE AT REDBRIDGE TOWNHOMES	APF2009-00004	Mark Friedman	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Approved	Single Family	4/20/2020	417	37	380	3/1/2005		160.128	80.481	106.752	347.361	145.92	73.34	97.28	316.54
Concord	THE VILLAGES AT SKYBROOK NORTH	THE VILLAGES AT SKYBROOK NORTH	THE VILLAGES AT SKYBROOK NORTH	APF2008-00087	PULTE HOMES	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (plating & permitting)	Single Family	4/7/2020	467	415	52	1/18/2005	12/31/2015	179.328	90.131	119.552	389.011	19.968	10.036	13.312	43.316
Concord	THE WAYFORTH AT CONCORD	THE WAYFORTH AT CONCORD	THE WAYFORTH AT CONCORD	APF2017-00018	MARTIN MARIETTA	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Townhouse	7/22/2020	150	157	-7			0	0	0	0	-0.966	-0.483	-0.644	-2.093
Concord	THE WOODS ON SOUTH UNION	THE WOODS ON SOUTH UNION	THE WOODS ON SOUTH UNION	APF2013-00006	MSMC Venture, LLC	Concord High School	Concord Middle School	W M Irvin Elementary School		Closed-Built Out	Single Family	12/30/2019	77	28	49			29.568	14.861	19.712	64.141	18.816	9.457	12.544	40.817
Midland	THOMPSONS LAKE	THOMPSONS LAKE	THOMPSONS LAKE	APF2008-00134	FRANK JACOBUS, WILLIAM BREWSTER CO																				

Jurisdiction	APF Base Subdivision	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	Units Approved	Units Issued	Units Remaining	Dev Order Approved	DO Last Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total										
Concord	VILLAGES AT DREAMING CREEK TOWNHOMES	VILLAGES AT DREAMING CREEK TOWNHOMES	APF2009-00003	YATES PROPERTIES, LLC	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		In Progress	Townhouse		46	0	46	7/17/2009	12/31/2015	6,348	3,174	4,232	13,754	6,348	3,174	4,232	13,754										
Kannapolis	VILLAGES AT FOREST PARK RETIREMENT FACILITY	VILLAGES AT FOREST PARK RETIREMENT FACILITY	APF2008-00178	Douglas Company, LLC	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School	Kannapolis Intermediate School	Age Restricted Development	Age Restricted		64	0	64			0	0	0	0	0	0	0	0										
Concord	VILLAGES AT LOGAN GARDENS RETIREMENT FACILITY	VILLAGES AT LOGAN GARDENS RETIREMENT FACILITY	APF2009-00014	Doug Hart	Jay M Robinson High School	HD Winkler Middle School	W M Irvin Elementary School		Age Restricted Development	Age Restricted	1/28/2014	44	2	42	9/15/2009		0	0	0	0	0	0	0	0										
Concord	VILLAGES AT WINECOFF	VILLAGES AT WINECOFF	APF2008-00043	Danny Bost	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Expired	Single Family	5/26/2017	99	85	14	3/15/2005	12/31/2013	38,016	19,107	25,344	82,467	5,376	2,702	3,584	11,662										
Mt. Pleasant	WALKER ROAD PROPERTIES	WALKER ROAD PROPERTIES	APF2019-00006	ERIN BURRIS	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Pending	Single Family		97	0	97			37,248	18,721	24,832	80,801	37,248	18,721	24,832	80,801										
Concord	WALLACE MEADOWS TOWNHOMES	WALLACE MEADOWS TOWNHOMES	APF2018-00008	PETE ELMER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending			98	0	98			0	0	0	0	22,736	11,368	15,19	49,294										
Kannapolis	WATERFORD ON THE ROCKY RIVER	WATERFORD ON THE ROCKY RIVER	APF2008-00066	Justin E Kies	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (planning & permitting)	Single Family	1/4/2018	278	246	32	4/21/2005	10/1/2016	106,752	53,654	71,168	231,574	12,288	6,176	8,192	26,656										
Concord	WATERSTONE AT WEDDINGTON APARTMENTS	WATERSTONE AT WEDDINGTON APARTMENTS	APF2008-00137	Brian Kaiser	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Closed-Built Out	Multi Family	1/17/2013	412	476	-64	11/21/2006		61.8	22.66	29.664	114.124	-14.848	-7.424	-9.92	-32.192										
Concord	WEDDINGTON HILLS OF CONCORD	WEDDINGTON HILLS OF CONCORD	APF2019-00020	ROBERT CASH	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Multi Family		720	0	720			167.04	83.52	111.6	362.16	167.04	83.52	111.6	362.16										
Concord	WEDDINGTON ROAD SITE MATTAMY HOMES	WEDDINGTON ROAD SITE MATTAMY HOMES	APF2015-00005	MATTAMY HOMES	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Single Family		281	0	281			107.904	54.233	71.936	234.073	107.904	54.233	71.936	234.073										
Concord	WEDDINGTON ROAD VILLAGES	WEDDINGTON ROAD VILLAGES	APF2020-00033	EDDIE MOORE	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending			90	0	90			0	0	0	0	20.88	10.44	13.95	45.27										
Kannapolis	WELLINGTON CHASE	WELLINGTON CHASE	APF2008-00061	PARKER AND ORLEANS HOMEBUILDERS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (planning & permitting)	Single Family	10/13/2017	349	366	-17	9/29/2005	5/22/2016	134,016	67,357	89,344	290,717	-6,528	-3,281	-4,352	-14,161										
Kannapolis	WELLINGTON GARDENS	WELLINGTON GARDENS	APF2013-00013	REA VENTURE GROUP	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Inactive	Multi Family		72	0	72	5/1/2013		16,704	8,352	11,16	36,216	16,704	8,352	11,16	36,216										
Concord	WELLSPRING VILLAGE RETIREMENT COMMUNITY	WELLSPRING VILLAGE RETIREMENT COMMUNITY	APF2008-00177	Crosland Homes	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Age Restricted Development	Age Restricted	11/12/2008	52	8	44	3/20/2008	12/31/2013	0	0	0	0	0	0	0	0										
Kannapolis	WEST G STREET	WEST G STREET	APF2018-00002	LONG RANGE DEVELOPMENT & PROPERTIES	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending			4	0	4			0	0	0	0	0.928	0.464	0.62	2.012										
Kannapolis	WEST OAKS PHASE 2	WEST OAKS PHASE 2	APF2008-00111	Brandon Little & Stephen Wasserman	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Expired	Single Family	2/3/2017	13	1	12	9/23/2008	9/14/2012	4,992	2,509	3,328	10,829	4,608	2,316	3,072	9,996										
Concord	WEXFORD POINTE APARTMENTS	WEXFORD POINTE APARTMENTS	APF2009-00012	Cathy Connors	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Closed-Built Out	Multi Family	5/6/2010	106	106	0	12/15/2009		24,592	12,296	16,43	53,318	0	0	0	0										
Kannapolis	WIGHTMAN OAKS	WIGHTMAN OAKS	APF2008-00031	WIGHTMAN HOMES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Expired	Townhouse	7/21/2017	13	10	3	1/24/2008		1,794	0,897	1,196	3,887	0,414	0,207	0,276	0,897										
Kannapolis	WILDWOOD RIDGE	WILDWOOD RIDGE	APF2014-00019	OAKMONT HOMES					Active (planning & permitting)	Single Family	11/2/2012	39	21	18	5/5/2004		14,976	7,527	9,984	32,487	6,912	3,474	4,608	14,994										
Concord	WILKINSON COURT REDEVELOPMENT SINGLE FAMILY	WILKINSON COURT REDEVELOPMENT SINGLE FAMILY	APF2019-00015	CITY OF CONCORD	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			7	0	7			0	0	0	0	1,624	0,812	1,085	3,521										
Concord	WILKINSON COURT REDEVELOPMENT TOWNHOMES	WILKINSON COURT REDEVELOPMENT TOWNHOMES	APF2019-00014	CITY OF CONCORD	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Townhouse		20	0	20			2,76	1,38	1,84	5,98	2,76	1,38	1,84	5,98										
Concord	WINDING WALK	WINDING WALK	APF2008-00092	Shea Homes	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	Single Family	10/16/2014	472	482	-10	7/13/2003	6/20/2013	181,248	91,096	120,832	393,176	-3,84	-1,93	-2,56	-8,33										
Kannapolis	WINDSOR	WINDSOR	APF2013-00005	KANNAPOLIS REAL ESTATE	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Expired	Single Family	3/9/2020	98	36	62			37,632	18,914	25,088	81,634	23,808	11,966	15,872	51,646										
Concord	WINECOFF SCHOOL ROAD/TIMMONS GROUP	WINECOFF SCHOOL ROAD/TIMMONS GROUP	APF2018-00009	AMERICAN SOUTH MGMT LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Townhouse		117	0	117			16,146	8,073	10,764	34,983	16,146	8,073	10,764	34,983										
Kannapolis	WHISPERING WINDS	WHISPERING WINDS	APF2014-00021	UNKNOWN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	Single Family	10/23/2008	36	33	3	9/8/2000		13,824	6,948	9,216	29,988	1,152	0,579	0,768	2,499										
Concord	WOODBIDGE AT ZEMOSA	WOODBIDGE AT ZEMOSA	APF2008-00090	NIBLOCK DEVELOPMENT CORP.	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		In Progress	Single Family	4/20/2020	50	49	1	5/15/2007	3/15/2015	19,2	9,65	12,8	41,65	0,384	0,193	0,256	0,833										
Midland	WYNDHAM ESTATES	WYNDHAM ESTATES	APF2008-00135	SCOTT COLLINS	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Closed-Built Out	Single Family	9/18/2017	30	21	9	11/20/2007		11,52	5,79	7,68	24,99	3,456	1,737	2,304	7,497										
Midland	WYNDHAM FOREST	WYNDHAM FOREST	APF2017-00024	DEPENDABLE DEVELOPMENT INC	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Pending	Single Family	10/19/2018	30	29	1			11,52	5,79	7,68	24,99	0,384	0,193	0,256	0,833										
Midland	WYNTREE	WYNTREE	APF2008-00136	UNKNOWN	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Pending	Multi Family	2/2/2021	149	108	41			34,568	17,284	23,095	74,947	9,512	4,756	6,355	20,623										
Concord	YATES MEADOW	YATES MEADOW	APF2008-00088	YATES MEADOW	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Closed-Built Out	Single Family	10/1/2013	220	147	73			84,48	42,46	56,32	183,26	28,032	14,089	18,688	60,809										
Harrisburg	ZION CHURCH RD RESIDENTIAL	ZION CHURCH RD RESIDENTIAL	APF2020-00005	FRANK SHEPHERDSON	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending			29	0	29			0	0	0	0	6,728	3,364	4,495	14,587										
Concord	ZION CHURCH ROAD SINGLE FAMILY CONCEPT	ZION CHURCH ROAD SINGLE FAMILY CONCEPT	APF2018-00027	JEREMY HORTON	A L Brown High School	C C Griffin Middle School	A T Allen Elementary School		Withdrawn	Single Family		222	0	222			85,248	42,846	56,832	184,926	85,248	42,846	56,832	184,926										
Concord	ZION CHURCH ROAD SITE	ZION CHURCH ROAD SITE	APF2018-00020	MATT MANDLE	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending	Single Family		116	0	116			44,544	22,388	29,696	96,628	44,544	22,388	29,696	96,628										
Concord	ZION CHURCH ROAD TOWNHOME CONCEPT	ZION CHURCH ROAD TOWNHOME CONCEPT	APF2018-00026	JEREMY HORTON	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Withdrawn	Townhouse		153	0	153			21,114	10,557	14,076	45,747	21,114	10,557	14,076	45,747										
												58277	26881	32,229													15368.02	7688.54	10157.25	33026.8	8649.032	4335.936	5771.574	18756.542

# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Reports

**SUBJECT:**

EDC - January 2020 Monthly Summary Report

**BRIEF SUMMARY:**

The Cabarrus Economic Development Corporation (EDC) provides monthly updates on the local economic and industry activities in the form of the included report.

**REQUESTED ACTION:**

For informational purposes. No action required.

**EXPECTED LENGTH OF PRESENTATION:**

**SUBMITTED BY:**

Page Castrodale, EDC Executive Director

**BUDGET AMENDMENT REQUIRED:**

No

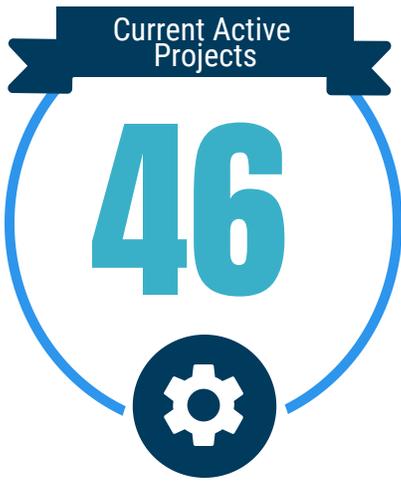
**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

This item was approved by the Board for inclusion on the Agenda.

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**ATTACHMENTS:**

- Report



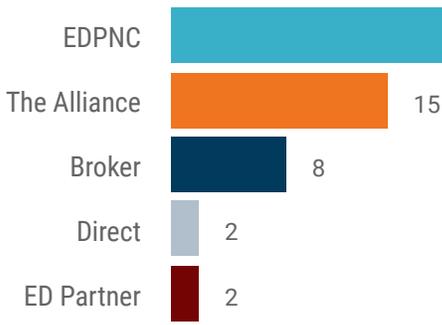
The EDC received 18 new RFIs (requests for information) in January and submitted sites/buildings for 16 of the new requests. There were 3 client/consultant visits in January.



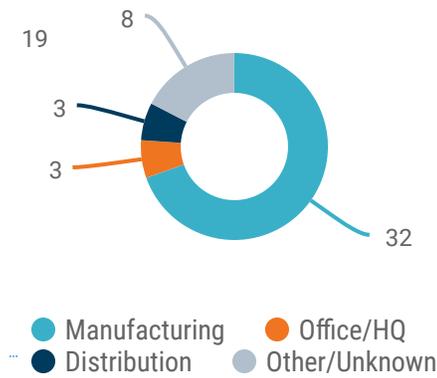
## Other Project Activity Stats



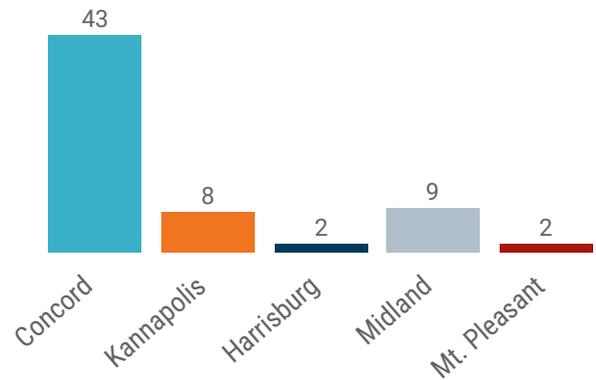
### Projects By Source



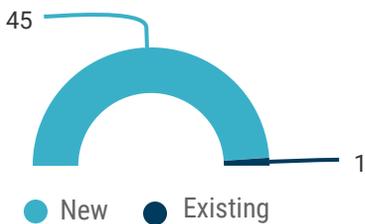
### Projects By Industry



### # of Projects By Location



### Projects By Type



**244**

average jobs per project



**89K**

average square feet per project



**39**

average acres per project



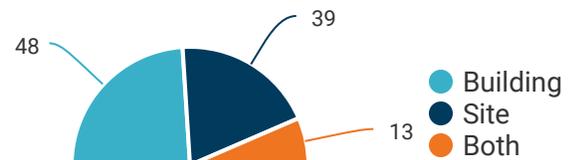
**20%**  
of Cabarrus EDC's projects involve companies outside of the U.S.



**65M**  
average investment per project



### Building vs. Site - %



# CABARRUS COUNTY



## BOARD OF COMMISSIONERS REGULAR MEETING

February 15, 2021  
6:30 PM

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**AGENDA CATEGORY:**

Closed Session

**SUBJECT:**

Closed Session - Pending Litigation and Economic Development

**BRIEF SUMMARY:**

A closed session is needed to discuss matters related to pending litigation and economic development as authorized by NCGS 143-318.11(a)(3) and (4).

**REQUESTED ACTION:**

Motion to go into closed session to discuss matters related to pending litigation and economic development as authorized by NCGS 143-318.11(a)(3) and (4).

**EXPECTED LENGTH OF PRESENTATION:**

30 Minutes

**SUBMITTED BY:**

Mike Downs, County Manager

**BUDGET AMENDMENT REQUIRED:**

No

**COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:**

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