CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

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

Brother Richard Brown, West Cabarrus Church

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. 39

C. RECOGNITIONS AND PRESENTATIONS

1. Active Living and Parks - July Park and Recreation Month Proclamation Pg. 41
2. Human Resources - Recognition of Senior Parks Program Manager Perry Gabriel on His Retirement from Cabarrus County Government Pg. 45

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 - Cox Mill Easement Request from Concord Parks and Recreation Pg. 46
2. Active Living and Parks - Matching Incentive Grant Update Proposal Pg. 50
3. Appointments - Board of Equalization and Review Pg. 71
4. Appointments - Centralina Workforce Development Board Pg. 77
5. Appointments - Mount Pleasant Planning Board and Board of Adjustment (ETJ) Pg. 83
6. Appointments - Public Health Authority of Cabarrus County Pg. 87
7. Appointments - Transportation Advisory Board Pg. 92
8. Appointments and Removals - Juvenile Crime Prevention Council Pg. 98
9. Appointments and Removals - Tourism Authority of Cabarrus County Pg. 107
10. Appointments (Removals) - Adult Care Home Community Advisory Committee Pg. 115
11. Appointments (Removals) - Cabarrus County Youth Commission Pg. 120
12. Cabarrus County Tourism Authority - FY2023 Budget Approval Pg. 125
13. Cabarrus Regional Chamber of Commerce - Funding for Edge Factor Pg. 136
14. County Manager - Adoption of the New Retention and Disposition Schedule for North Carolina Pg. 154
15. DHS - FY23 HCCBG (Home and Community Care Block Grant) Funding Plan Pg. 397
16. Human Resources - Personnel Ordinance Updates Pg. 464
17. Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 3535 Katrina Avenue, Further Identified as PIN 5641-70-7417 Pg. 467
18. Planning and Development - Budget Amendment to Allocate Newly Awarded Duke Helping Home Fund Revenues and Expenses Pg. 473
19. Tax Administration - Refund and Release Reports - May 2022 Pg. 476

G. NEW BUSINESS

1. County Manager - Adoption of the FY23 Budget Pg. 489
2. Finance - Budget Amendment for Debt Refunding of Limited Obligations Bonds - 2022A Pg. 500
3. Infrastructure and Asset Management - Purchase of Courtroom Pews Pg. 503

H. REPORTS

1. BOC - Receive Updates from Commission Members who Serve as Liaisons to Municipalities or on Various Boards/Committees Pg. 507
2. BOC - Request for Applications for County Boards/Committees Pg. 508
3. Budget - Monthly Budget Amendment Report Pg. 522
4. Budget - Monthly Financial Update Pg. 554
5. County Manager - Monthly Building Activity Reports Pg. 560
6. County Manager - Monthly New Development Report Pg. 566
7. EDC - May 2022 Monthly Summary Report Pg. 577

I. GENERAL COMMENTS BY BOARD MEMBERS

J. WATER AND SEWER DISTRICT OF CABARRUS COUNTY

K. CLOSED SESSION

1. Closed Session - Pending Litigation, Economic Development and Acquisition of Real Property Pg. 579

L. ADJOURN

Scheduled Meetings

July 5	**Work Session**	**4:00 p.m.**	**Multipurpose Room**
July 18	**Regular Meeting**	**6:30 p.m.**	**BOC Meeting Room**
July 20	**Cabarrus Summit**	**6:00 p.m.**	**Cabarrus Arena**
August 1	**Work Session**	**4:00 p.m.**	**Multipurpose Room**
August 15	**Regular Meeting**	**6:30 p.m.**	**BOC Meeting Room**

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.

Sunday - Saturday	**1:00 P.M.**
Sunday - Tuesday	**6:30 P.M.**
Thursday & Friday	**6:30 P.M.**

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

June 20, 2022
6:30 PM

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:

April 4, 2022 (Work Session)
April 14, 2022 (Budget Meeting)
April 19, 2022 (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.

ATTACHMENTS:

- Work Session
- Budget Meeting
- Regular

The Board of Commissioners for the County of Cabarrus met for an Agenda Work Session in the Multipurpose Room at the Cabarrus County Governmental Center in Concord, North Carolina at 4:00 p.m. on Monday, April 4, 2022.

Public access to the meeting could also 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

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

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

1. Call to Order

Chairman Morris called the meeting to order at 4:01 p.m.

2. Approval of Agenda

Chairman Morris presented the following changes to the agenda:

Additions:
Discussion Items for Action
4.18 Proclamation - Week of the Young Child

Closed Session
6.1 Closed Session - Pending Litigation and Economic Development

Moved to Discussion Items for Action:
4.16 Infrastructure and Asset Management - Mt. Pleasant Library-Senior Center-Park Complex Update

Updated:
4.15 Infrastructure and Asset Management - Courthouse Expansion Public Art Award

UPON MOTION of Commissioner Shue, seconded by Commissioner Strang and unanimously carried, the Board approved the agenda as amended.

3. Discussion Items - No Action

3.1 Infrastructure and Asset Management - Emergency Medical Services Headquarters Project Update

Kyle Bilafer, Area Manager of Operations, presented an update on the Emergency Medical Services Headquarters project. Topics covered are as follows: stormwater issues; subgrade stormwater, subgrade sprinkler lines and subgrade electric lines; steel erection will begin in the next couple of weeks; etc. Mr. Bilafer also reviewed photos showing the work in progress.

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

3.2 Innovation and Technology - Innovation Report

Todd Shanley, Chief Information Officer, presented the Innovation and Technology Report for April 2022. Mr. Shanley then presented a short review of the new County website.

Carla Brown, Early Childhood Development Coordinator, and Waynett Taylor, Lockhart Child Development Center, Executive Director, presented an update on the Lockhart Child Development Center. The Lockhart Child Development Center is a public-private partnership between Cabarrus County and All Saints Episcopal Church that is the result of a recommendation from the Early Childcare Task Force Advisory Board to the Board of Commissioners. The following information was addressed:

- Enrollment and Staff

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- Staff Credentials
- Lab site for Rowan-Cabarrus Community College
- Other Partnerships
- Five Star Requirement System
- Next Goal – National Accreditation

These projects continue to meet the County's Strategic Plan and Strategic Initiatives:

- Transparent and Accountable Government
- Healthy and Safe Community
- Thriving Economy
- Sustainable Growth and Development
- Culture and Recreation

A lengthy discussion ensued. During discussion, Ms. Taylor and Ms. Brown responded to questions from the Board.

4. Discussion Items for Action

4.18 Proclamation - Week of the Young Child

Carla Brown, Early Childhood Development Coordinator, read the proclamation aloud.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Strang and unanimously carried, the Board suspended the Rules of Procedure due to time constraints.

UPON MOTION of Vice Chairman Kiger, seconded by Commissioner Strang and unanimously carried, the Board adopted the proclamation.

Proclamation No. 2022-05

PROCLAMATION
WEEK OF THE YOUNG CHILD

WHEREAS, the Early Childhood Foundation of Cabarrus County along with the Cabarrus Partnership for Children, in conjunction with the North Carolina Association for the Education of Young Children (NCAEYC) and National Association for the Education of Young Children (NAEYC), are celebrating the Week of the Young Child™ April 2-8, 2022, and the Month of the Young Child throughout April; and

WHEREAS, these organizations are working to promote and inspire high quality early childhood experiences for our state's youngest citizens, that can provide a foundation of learning and success for children in Cabarrus County; and

WHEREAS, teachers and others who work with or on behalf of young children birth through age eight, who make a difference in the lives of young children in Cabarrus County deserve thanks and recognition; and

WHEREAS, public policies that support early learning for all young children are crucial to young children's futures and to the prosperity of our society.

NOW, BE IT PROCLAIMED, that the Cabarrus Board of County Commissioners for Cabarrus County, North Carolina, do hereby proclaim April 2-8, 2022 as

WEEK OF THE YOUNG CHILD™

In Cabarrus County and encourage all citizens to work to support and invest in early childhood in Cabarrus County.

Adopted this 4th day of April, 2022.

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

4.1 Active Living and Parks - Senior Center Grants

Byron Hagler, Active Living and Parks Assistant Director, presented information regarding the Senior Center General Purpose and Health Promotion and Disease Prevention grant fund updates (state approved budget) and associated budget amendments. The match for both grants is budgeted in the senior center

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salary accounts 9101 and 9103.

4.2 BOC - Appointments to Boards and Committees

Chairman Morris reported information regarding appointments to boards and committees was provided in the agenda. These appointment requests will be included in the Consent section of the April 19, 2022, regular meeting agenda.

4.3 BOC - Resolution Dissolving Advisory Board

Mike Downs, County Manager, reported the Animal Protection Advisory Board was created via resolution by the Cabarrus County Board of Commissioners in 2015 to review the Animal Shelter's policies and procedures when the Humane Society of Concord and Greater Cabarrus County operated the facility. Since then, the Animal Shelter has shifted under the oversight of the Sheriff. The board served strictly as an advisory board. They do not hold a supervisory role to the Animal Shelter or the Sheriff's Office. The current members were contacted, there was little response and no commitment of leadership. Animal Shelter and Sheriff's Office staff feel under the current organizational structure, they are able to achieve the necessary goals without an advisory board.

A brief discussion ensued.

4.4 DHS - Transportation Drug and Alcohol Policy

Charles Ratliff, Department of Human Services (DHS) Transportation Operations and Training Supervisor, reported as part of the Safety System Plan, the Federal Transportation Agency requires a drug and alcohol policy because of the special requirements of transportation. DHS has an additional separate policy along with the County policy. Mr. Ratliff presented the policy for the Board's review. He also responded to questions. Bob Bushey, Transportation Manager, was also in attendance.

4.5 DHS - Transportation Federal Transit Administration Resolution

Bob Bushey, Transportation Manager, reported Cabarrus County will no longer administer the Federal Transit Administration 5307 Grant and will begin applying directly to the Federal Transit Authority. He stated a resolution will be needed authorizing the County Manager and Cabarrus County to do so. Mr. Bushey also responded to questions from the Board.

4.6 DHS - Transportation System Safety Plan

Charles Ratliff, Department of Human Services (DHS) Transportation Operations and Training Supervisor, reported the North Carolina Department of Transportation (NCDOT) requires each transit system to create and maintain a systems safety plan. NCDOT audits each system every three years for compliance in the areas of safety, security practices and policies.

Mr. Ratliff stated, as part of Cabarrus County's audit that occurred this year, the NCDOT requires the Board's approval of the safety plan.

A discussion ensued. During discussion, Mr. Ratliff and Bob Bushey, Transportation Manager, responded to questions.

4.7 Finance - American Rescue Plan Act Funds for Broadband and Nonprofits

Wendi Heglar, Finance Director, presented a proposal to use the unallocated funds from the American Rescue Plan Act Fund for broadband and nonprofits as follows:

- Completing Access to Broadband (CAB) - $2,000,000 – county match to expand broadband in rural/underserved communities
- Habitat for Humanity - $500,000 – additional funds for the critical home repair program
- Education Foundation - $164,090 – funding needed to pilot Reading + Mentoring 4 Success program to address learning loss.
- Conflict Resolution Center - $21,361 – funding to address lost revenue resulting from the pandemic

Rodney Harris, Deputy County Manager, and Mike Downs, County Manager, provided additional information regarding the proposal.

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A discussion ensued. During discussion, Mr. Harris, Mr. Downs, and Todd Shanley, Chief Information Officer, responded to questions from the Board.

4.8 Finance - American Rescue Plan Act Funds for Cooperative Christian Ministry

Wendi Heglar, Finance Director, reported Cooperative Christian Ministries (CCM) received a $2,000,000 allocation of ARPA (American Rescue Plan Act) funds. They would like to include the Huddle Housing as an additional approved project.

Rodney Harris, Deputy County Manager, stated CCM's original allocation was for their homeless to housing project, which is to provide transitional housing for those that are experiencing homelessness. He advised the Huddle Housing is more of a longer-term housing CCM would like to be able to use those funds for. Upon approval CCM would be able to use the funds for both projects

A brief discussion ensued.

4.9 Finance - Appropriate Insurance Refund for Ambulance Repair

Kyle Bilafer, Area Manager of Operations, reported an ambulance was involved in an accident on October 23, 2021. The chassis was totaled, and the box was remounted to a new chassis. Insurance funds were received to cover the costs. Mr. Bilafer requested those funds be moved from the insurance account to the general account to cover the cost of the new chassis and remount.

A brief discussion ensued. During discussion, Jimmy Lentz, Emergency Medical Services Director, responded to questions from the Board.

4.10 Finance - Debt Refunding of Limited Obligations Bonds - 2022A

Wendi Heglar, Finance Director, presented a request for debt refunding of Limited Obligation Bonds – 2022A. She stated a public hearing was held last month. Ms. Heglar advised this will require adoption of a resolution to approve refinancing of the prior installment financing contract financings in an aggregate principal amount up to $130,000,000; the execution and delivery by the Cabarrus County Development Corporation of one or more series of limited obligation bonds related thereto; authorizing the execution and delivery of related documents in connection therewith; and providing for certain other related matters.

Rodney Harris, Deputy County Manager, provided an update regarding the loan term on the new county courthouse project. Mr. Harris advised the loan term will be a 20-year term rather than a 30-year term.

A lengthy discussion ensued. During discussion, Mr. Harris, and Mike Downs, County Manager, responded to questions from the Board.

4.11 Finance - Fire District Property Tax Budget Amendment

Wendi Heglar, Finance Director, presented a request for a fire district property tax budget amendment. She stated this budget amendment will increase Fire Districts' current year property tax collections as well as increase related districts' turnovers. Ms. Heglar also responded to questions from the Board.

4.12 Finance - Resolution Approving Installment Financing Contract 2022B Draw-Down LOBS for Various School and County Projects Up to $160,000,000

Wendi Heglar, Finance Director, reported Cabarrus County plans to enter into one or more short and/or long-term installment financing contracts, including the use of a draw down loan structure with the Cabarrus County Development Corporation or one or more third parties, for an amount not to exceed $160,000,000 to finance all or a portion of the cost of constructing and equipping public school and county facilities and various real and personal property improvements. She stated the public hearing was held March 21, 2022.

Mr. Harris, Deputy County Manager, stated this is for the courthouse, the EMS Headquarters, the Mount Pleasant Library and Senior Center, and other projects including roof replacements for the school system.

4.13 Finance - Roberta Road Middle School Road Improvements

Wendi Heglar, Finance Director, reported the bid for Roberta Road Middle School Road Improvements came in well over budget. The budget was $1.7 million, and the bid was just over $2.8 million. After value engineering the cost will be less than $2.5 million. All costs are reimbursable by the North Carolina

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Department of Transportation (NCDOT). The budget amendment increases the revenue from NCDOT as well as the expenditures.

Brian Cone, Cabarrus County Schools (CCS), Director of Architecture, Planning and Construction, presented a background of the project and estimated costs for the improvements.

A discussion ensued. During discussion, Mr. Cone responded to questions.

UPON MOTION of Vice Chairman Kiger, seconded by Commissioner Shue and unanimously carried, the Board suspended the Rules of Procedure due to time constraints.

UPON MOTION of Commissioner Shue, seconded by Commissioner Honeycutt and unanimously carried, the Board approved the budget amendment and capital project ordinance.

Date:	4/4/2022	**Amount:**	1,000,000.00
Dept. Head:	Wendi Heglar	**Department:**	Finance - School Capital Projects

☐ **Internal Transfer Within Department** ☐ **Transfer Between Departments/Funds** ☑ **Supplemental Request**

Cabarrus County School request additional funds to cover road construction for Roberta Road Middle School. Bids came in over budget. The cost will be reimbursed by NCDOT.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
390	9	7346 9802	Road Construction	1,700,000	800,000		2,500,000
390	6	7346 6439	Architects	500,000	800,000		1,300,000

Ordinance No. 2022-15

CABARRUS COUNTY
SCHOOL CAPITAL PROJECTS
BUDGET ORDINANCE

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

Section I.

A. The project authorized is for the construction and renovations of School Facilities. Details of the project are listed in section C. of this Project Ordinance.

B. The officers of this unit are hereby directed to proceed with this capital project within the terms of the Generally Accepted Accounting Principles (GAAP) and the budget contained herein.

It is estimated that the following revenues will be available to complete capital projects as listed.

Contribution from General Fund/CIF	$19,765,958
Contribution from Capital Projects Fund	9,522,511
Debt Proceeds 2020 Draw Note	46,620,222
Debt Proceeds 2022 Draw Note	55,711,930
Contribution from Capital Reserve Fund	1,662,314
NC Department of Transportation	1,300,000
TOTAL REVENUES	$134,582,935

C. The following appropriations are made as listed.

CCS Mobile Unit Renovation	$3,300,000
Concord High Fire Alarm Replacement	89,314
Northwest High Fire Alarm Replacement	89,314
JM Robinson Renovation	81,195
R. Brown McAllister Replacement	39,950,000
Roberta Road Middle School	56,604,300
CCS New High School	9,508,821
Kannapolis Middle School	138,897
AL Brown Football Stadium ADA/Drainage	228,000
AL Brown Roof Replacement	190,000
RCCC Building 1000 Boiler	62,780
RCCC Building 2000 Roof Replacement	154,500
RCCC CBTC HVAC	244,291
Contribution to Capital Reserve	5,001,114
Early College Mobile Units	1,850,000

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Deferred Maintenance Cabarrus County Schools	13,431,125
Deferred Maintenance Kannapolis City School	2,451,284
Deferred Maintenance Rowan Cabarrus Community College	1,208,000
TOTAL EXPENDITURES	$134,582,935
GRAND TOTAL – REVENUES	$134,582,935
GRAND TOTAL – EXPENDITURES	$134,582,935

Section II.

A. Special appropriations to non-profit organizations shall be distributed after the execution of an agreement which ensures that all County funds are used for statutorily permissible public purposes.

B. The County Manager or designee is hereby authorized to transfer appropriations within or between funds, or modify revenue and expenditure projections as contained herein under the following conditions:

1. The Manager may transfer amounts between objects of expenditure and revenues within a function without limitation.

2. The County Manager may transfer amounts up to $500,000 between functions of the same fund.

3. The County 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.

4. The County Manager is authorized to transfer funds from the General Fund or Capital Reserve Fund to the appropriate fund for projects approved within the Capital Improvement Plan for the current fiscal year.

5. Upon notification of funding increases or decreases to existing grants or revenues, or the award of grants or revenues, the Manager or designee may adjust budgets to match, including grants that require a County match for which funds are available.

6. The Manager or designee may adjust debt financing from estimated projections to actual funds received.

7. The County Manager may enter into and execute change orders or amendments to construction contracts in amounts less than $90,000 when the appropriate annual budget or capital project ordinance contains sufficient appropriated but unencumbered funds.

8. The County Manager may award and execute contracts which are not required to be bid or which G.S. 143-131 allows to be let on informal bids so long as the annual budget or appropriate capital project ordinance contains sufficient appropriated but unencumbered funds for such purposes.

9. The County Manager may execute contracts with outside agencies to properly document budgeted appropriations to such agencies where G.S. 153 A-248(b), 259, 449 and any similar statutes require such contracts.

10. The County Manager may reject formal bids when deemed appropriate and in the best interest of Cabarrus County pursuant to G.S. 143-129(a).

11. The County Manager may reduce revenue projections consistent with prevailing economic conditions, and also reduce expenditures correspondingly.

Section III.

This ordinance and the budget documents shall be the basis of the financial plan for the County of Cabarrus.

a. The Finance Director is hereby directed to maintain within the Capital Project Fund sufficient detailed accounting records to satisfy the requirements of the law.

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

c. Copies of this capital project ordinance shall be furnished to the Clerk to the governing Board, and to the Finance Director for direction in carrying out this project.

d. At the completion of a construction project, all unrestricted excess funds are transferred to the General Fund, Community Investment Fund or other Capital Project Fund and the portion of the Capital Project associated with the project is closed.

Adopted this 4th day of April, 2022.

CABARRUS COUNTY BOARD OF COMMISSIONERS

BY: /s/ Stephen M. Morris
Stephen M. Morris, Chairman

ATTEST:

/s/ Lauren Linker
Clerk to the Board

4.14 Fire Marshal's Office - Ordinance Approval

Steve Langer, Emergency Management Director, presented a request for approval of the proposed fire district ordinance. He stated this is the last step in the process for finalizing the fire district boundary changes that were presented to the Board in March. Mr. Langer stated the map information was forwarded to the OSFM (Office of the State Fire Marshal). The State has reviewed the maps and no further information is needed in order to move forward. He further stated a map depicting the proposed fire district boundaries is attached to the ordinance.

A discussion ensued. During discussion, Mr. Langer responded to questions from the Board. Jacob Thompson, Fire Marshal, was also in attendance.

4.15 Infrastructure and Asset Management - Courthouse Expansion Public Art Award

Kyle Bilafer, Area Manager of Operations, reported the County received 77 public art RFQs (Request for Qualifications) submittals on December 20, 2021. After several months of evaluations and interviews, the Public Art Selection Committee decided on three finalists who provided a proposal and a 60-minute interview for their project. Those interviews took place during the last week of March 2022. Staff presented the committee's selected finalist for the Courthouse Expansion Public Art Award and announced that Norman Lee was chosen.

A lengthy discussion ensued. During discussion, Mr. Bilafer responded to questions.

Sara Gay, City of Concord, Clearwater Arts Center and Studios Director, and Noelle Scott, Retired Arts Council Director, provided additional comments and information.

Commissioner Honeycutt **MOVED** to suspend the Rules of Procedure due to time constraints. Commissioner Strang seconded the motion.

Following discussion, the **MOTION** unanimously carried.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved the bid award and authorized the County Manager to execute the contract between Cabarrus County and Norman Lee, subject to revision by the County Attorney.

4.16 Infrastructure and Asset Management - Mount Pleasant Library-Senior Center-Park Complex Update

Kyle Bilafer, Area Manager of Operations, presented an update and initial draft of the Mount Pleasant Library-Senior Center Park Complex. During the presentation, Mr. Bilafer and Rodney Harris, Deputy County Manager, presented information on the projected costs and operating expenses once the complex is built.

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A lengthy discussion ensued. During discussion, Mr. Bilafer, Mr. Harris, Mike Downs, County Manager, and Londa Strong, Active Living and Parks Director, responded to questions from the Board.

The Board provided input regarding the plans and design work. It was the consensus of the Board for the project to move forward and completed in its entirety.

4.17 Planning and Development - Community Development Division- Housing and Home Improvement Budget Amendment

Kelly Sifford, Planning and Development Director, reported Cabarrus County has received $390 of program revenue for the Housing and Home Improvement Program grant. According to the grant requirements, the funds need to be allocated back to the program for expanded services.

A brief discussion ensued. During discussion, Ms. Sifford responded to questions.

5. Approval of Regular Meeting Agenda

5.1 BOC - Approval of Regular Meeting Agenda

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

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved the agenda as follows for the April 19, 2022 regular meeting.

Approval or Correction of Minutes
- Approval or Correction of Meeting Minutes

Recognitions and Presentations
- Active Living and Parks - Older Americans Month Proclamation

Consent
- Active Living and Parks - Senior Center Grants
- Appointments - Nursing Home Community Advisory Committee
- Appointments (Removals) - Industrial Facilities and Pollution Control Financing Authority
- BOC - Resolution Dissolving Advisory Board
- DHS - Transportation Drug and Alcohol Policy
- DHS - Transportation Federal Transit Administration Resolution
- DHS - Transportation System Safety Plan
- Finance - American Rescue Plan Act Funds for Broadband and Nonprofits
- Finance - American Rescue Plan Act Funds for Cooperative Christian Ministry
- Finance - Appropriate Insurance Refund for Ambulance Repair
- Finance - Debt Refunding of Limited Obligations Bonds - 2022A
- Finance - Fire District Property Tax Budget Amendment
- Finance - Resolution Approving Installment Financing Contract 2022B Draw-Down LOBS for Various School and County Projects Up to $160,000,000
- Fire Marshal's Office - Ordinance Approval
- Infrastructure and Asset Management - Mt. Pleasant Library-Senior Center-Park Complex Update
- Planning and Development - Community Development Division- Housing and Home Improvement Budget Amendment
- Tax Administration - Refund and Release Reports – March 2022

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
- Budget - Monthly Budget Amendment Report
- Budget - Monthly Financial Update
- County Manager - Monthly Building Activity Reports
- County Manager - Monthly New Development Report
- EDC - March 2022 Monthly Summary Report

6. Closed Session

6.1 Closed Session - Pending Litigation and Economic Development

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UPON MOTION of Vice Chairman Kiger, seconded by Commissioner Honeycutt and unanimously carried, the Board moved 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).

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board moved to come out of closed session.

Return to Open Session

Commissioner Honeycutt announced the Youth Leadership Institute will kick off tomorrow, Tuesday, April 5, 2022, with a retreat, attend a Cannon Baller game on May 3, 2022, and hold five sessions in June. Twenty-five students from across the County are participating.

7. Adjourn

UPON MOTION of Commissioner Shue, seconded by Vice Chairman Kiger and unanimously carried, the meeting adjourned at 7:40 p.m.

_____
Lauren Linker, Clerk to the Board

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The Board of Commissioners for the County of Cabarrus met for a Budget Meeting in the Multipurpose Room at the Cabarrus County Governmental Center in Concord, North Carolina at 4:00 p.m. on Thursday, April 14, 2022.

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

Also present were Mike Downs, County Manager; Rodney Harris, Deputy County Manager; and Lauren Linker, Clerk to the Board.

Call to Order

Chairman Morris called the meeting to order at 4:00 p.m.

Cabarrus County Schools Presentation of FY 2023 Budget Request

Dr. John Kopicki, Cabarrus County Schools (CCS), Superintendent, commended the Board for the facilities that have been provided for the schools. He also expressed appreciation for the support the Commissioners and county managers have given to the Cabarrus County School system.

Carol Herndon, CCS Chief Finance Officer presented the school's budget request via a PowerPoint presentation. The following information was presented.

- Budget Development and Process
- Funding Considerations
  - Operating Expense - Continuation
  - Operating Expense – Expansion
    - Technology
    - Operational
    - Facilities and Maintenance Department (FMD)
  - Capital Outlay
- Continuation Requests
- New Construction and Capital Improvement Projects (greater than or equal to $500,000)
- Deferred Maintenance FMD Capital
- Non-FMD Capital Outlay
- Budget Committee Recommendation
- Charter School Enrollment

Continuation Requests

Description	General	Technology	Facilities	Total
Provision to increase locally paid certified staff (64) to match state increase (Year 2 of 2021-2023 Biennium Budget) *Average increase = 2.5%*	104,365	-	-	104,365
Provision to increase locally paid non-certified staff to match state increase (Year 2 of 2021-2023 Biennium Budget) *Increase to $15.00/hour or 2.5%, whichever is greater*	282,252	53,129	123,167	458,549
Compression for non-teaching staff *One step increase every other year to reflect service years (2.5%) (average 1.25% yearly)*	166,417	19,248	68,314	253,979
Provision to maintain supplements at 12% (with 2.5% increase in salaries) * *Currently the County Budget includes funding local teacher supplement at 10.5%*	1,773,465	-	-	1,773,465
Provision to pay supplement for new teachers based on expected ADM growth	289,352	-	-	289,352
Provision for increase in employer retirement costs for locally paid staff (projected increase from 22.89% to 24.14%)	150,484	18,968	43,974	213,426
Provision for increase in hospitalization costs for locally paid staff (5% projected increase)	111,500	14,500	39,000	165,000
Inflation at 25% (Fuel and Maintenance/Repair costs)	-	-	1,189,386	1,189,386
Operational software	-	190,000	-	190,000
Provision for new school staff and expenses				
Roberta Road Middle School	177,297	-	-	177,297
Cabarrus Health Sciences Institute	245,132	10,600	-	255,732
Total Continuation	**$ 3,300,266**	**$ 306,445**	**$ 1,463,841**	**$ 5,070,552**

** CCS plans to fund via ESSER funding through June 30, 2024*

Technology Expansion Requests

Rank	Description	Funding Request	Points
1	Additional Break-fix Technicians	210,000	9.19
2	Increase Chromebook Repair Budget	170,000	7.47
3	School Sound Systems	138,000	6.33
4	ID Card Printer Refresh	54,400	4.40
	Total	**$ 572,400**	

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Operational Expansion Requests

Rank	Description	Funding Request	Points
1	Permanent Substitute Teachers	1,872,000	8.35
2	Additional Pay for Specialized Instructional Support Personnel (SISP) - Leads	50,000	8.14
3	Additional Pay – Opportunity School	19,200	7.93
4	Staff Development	195,000	7.81
5	Specialized Instructional Support Personnel (SISP)-Coordinators District Level	400,000	7.33
6	Increase in Instructional Supplies	200,000	4.91
7	Subscriptions	45,000	4.63
*	Increase stipends for VEX Robotics Coaches	205,000	
*	Professional Development for Principals – National Institute for School Leadership (NISL)	100,000	
	Total	**$ 3,086,200**	

FMD Expansion Requests

Description	Department	Funding Request
Facilities & Grounds Sustainment Maintenance	Facilities & Maintenance Department	$ 1,300,000
	Total	**$ 1,300,000**

Total Operating Expense Request Summary

Operating Expense	2021 - 2022	Continuation	Expansion	% Increase
Operating Expense	53,196,371	☆ 1,526,801	3,086,200	8.67%
Operating Expense - Technology	6,798,222	306,445	572,400	12.93%
Operating Expense – FMD	10,989,963	1,463,841	1,300,000	25.15%
Total	**$70,984,556**	**$3,297,087**	**$ 4,958,600**	**11.63%**

Ms. Herndon reviewed a long list of new construction and Capital Improvement Project needs for FY23 totaling $342,721,166. She then reviewed a list of deferred maintenance – FMD Capital projects totaling $7,074,158, and Non-FMD Capital Outlay projects totaling $1,716,000.

There was discussion throughout the presentation. During discussion, Ms. Herndon, Dr. Kopicki, and John Legrand, CCS Chief Operations Officer, responded to questions from the Board.

Commissioner Shue arrived at 4:27 p.m. and was present for the remainder of the meeting.

Kannapolis City Schools Presentation of FY 2023 Budget Request

Kevin Garay, Kannapolis City Schools (KCS), Superintendent, thanked the Board and County Manager's office for their support.

Will Crabtree, KCS Director of Business Operations, presented the school's budget request via a PowerPoint presentation. The following information was included in the presentation.

CIP

Proposal	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Future Years
A. L. Brown Intercom System	75,000.00						
A.L. Brown Campus Master Plan (Renovations/Additions)		65,906,794.00					26,001,438.00
A.L. Brown High School Camera Replacement	171,000.00						
Central Office HVAC				100,000.00			
Forest Park Elementary	424,475.00						4,174,163.00
Forest Park Elementary HVAC Uprades			3,000,000.00				
Forest Park Playground		100,000.00					
Fred L Wilson Boiler		100,000.00					
Fred L Wilson Parent Drive Paving				125,000.00			
Fred L Wilson Playground		100,000.00					
Fred L. Wilson Asbestos Abatement	126,800.00						
Fred L. Wilson Elementary Addition/HVAC Replacement		TBD					6,113,182.00
Fred L. Wilson Flooring Replacement	187,597.00						
G. W. Carver Floor Replacement	34,204.00						
Jackson Park Asbestos Abatement	44,600.00						
Jackson Park Boiler		150,000.00					
Jackson Park Elementary Addition, Roof, HVAC Replacement	335,280.00	TBD					9,331,432.00
Jackson Park Flooring Replacement	49,143.00						
Jackson Park Playground Replacement	100,000.00						
Jackson Park Renovate Restrooms				120,000.00			
Kannapolis Middle School HVAC (2005 Building)			3,000,000.00				
Kannapolis Middle School Irrigation		125,000.00					
North Kannapolis Elementary HVAC			3,000,000.00				
North Kannapolis Flooring Replacement	127,016.00						
North Kannapolis Playground Equipment	100,000.00						
North Kannapolis Roof Replacement				125,000.00			
Shady Brook Elementary HVAC			3,000,000.00				
Shady Brook Flooring							
Shady Brook Flooring Replacement	145,449.00						
Shady Brook Playground Replacement	100,000.00						
Tennis Court Renovations (A.L. Brown)			500,000.00				
Track Renovations (A.L. Brown)	366,000.00						
	2,386,564.00	66,481,794.00	12,500,000.00	470,000.00			45,620,215.00

Mr. Crabtree and Mr. Garay presented an overview of the of the following items:

- Capital Outlay buildings and grounds less than $100,000 - $2,560,000
- Capital Outlay Transportation - $196,000
- Current Expense Continuation and Local Salaries - $3,109,778
- Teacher Supplement Increase
- Charter Schools
- Current Expense Expansion - $665,000

There was discussion throughout the presentation. During discussion, Mr. Crabtree, and Mr. Garay responded to questions.

Break

The Board took a short break at 5:53 p.m. The meeting resumed at 6:03 p.m.

Rowan-Cabarrus Community College Presentation of FY 2023 Budget Request

Dr. Carol Spalding, Rowan-Cabarrus Community College (RCCC) President, Kelly Kluttz, Chief Financial Officer, and Jonathan Chamberlain, Chief Officer Division of College Environment, presented RCCC's budget request via a PowerPoint presentation. The following information was included in the presentation.

- 2018-2023 Strategic Plan Themes
- Enrollment
- Advance Technology Center
- Additional Workforce Development Programs
- FY23 Budget Requests Summary
  - Current Operating Budget Request - $3,952,154
  - Capital Budget Request - $13,909,000
  - Total Budget Request - $17,861,154
- Current Operating Expansion Requests - $197,454
- Capital Budget Requests - $13,909,000
  - Building 1000 HVAC
  - Building 2000 Back-Fill Remodels
  - Building 3000 Refresh
  - Building 1000 Space Renovation
  - Trinity Church Road Property Acquisitions
- Future Budget Requests
  - Future Capital Budget Requests
    - 2024
      - Driver Training Range - $12,935,000
      - South Campus Building 4000 Workforce Innovations - $35,335,000
    - 2026
      - College Station Classroom Buildout - $658,000
    - 2027
      - Southern Campus Site and Land Acquisition - $1,000,000
    - 2029
      - South Campus Building 5000 Technical Programs Building - $38,235,000
- Anticipated Needs
  - Growth in Transfer Programs Related to Science, Arts and Math
  - Acquire Adjacent Properties (PSNC)
  - Corporate and Continuing Education Growth
  - Large Meeting Space
- New and Expanded Programs

There was discussion throughout the presentation. During discussion, Dr. Spalding, Mr. Chamberlin, and Ms. Kluttz responded to questions.

Landfill Tipping Fee and Yard Waste Fee Increase

Kevin Grant, Environmental Management Director, reported part of the Landfill's budget proposal for FY23 includes fee increases. He stated this would be the first increase in four years. This would affect some of the landfill and yard waste tipping fees. Mr. Grant reviewed the proposed changes to the Fee Schedule. He further stated the fee increase would cover increased operating expenses and increase staffing. Mr. Grant advised there are three to four potential landfill expansion sites that could add 10 to 15 years to the facility. The proposed increase will also keep the County's fees in line with the private construction and demolition landfill in the county.

The proposed fee schedule is as follows:

FEE SCHEDULE EFFECTIVE: JULY 1, 2022

Construction & Demolition (C&D) Waste
$42 Per Ton for Loads Weighing 1/2 Ton and Higher (1 ton minimum)
$25 Flat Rate for Loads Weighing Between 501 – 1,000 Pounds
$13 Flat Rate for Loads Weighing up to 500 Pounds

Uncontaminated Yard Waste
$40 Per Ton
Mixed Debris: $45 Per Ton
Special Handling Charge: $30 Per Ton

ALL C&D WASTE LOADS SUBJECT TO STATE DISPOSAL TAX OF $2.00 PER TON
NO C&D LOADS ACCEPTED AFTER 4:45 pm, MONDAY – FRIDAY AND 11:45 am ON SATURDAY

Residential Household Trash / Bulky Waste / Yard Waste
All Small, Loose Household Trash Must Be Bagged

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Up to 5 – (32) Gallon Bags: $6.00
6 to 10 – (32) Gallon Bags: $9.00
Pickup Truck Sized or Trailer (up to 8 feet) Load: $15.00
Pickup Truck Sized or Trailer (up to 8 feet) With Sideboards Loaded over 20 inches High: $24.00

*No Household Loads on Trailers Over 8' in Length Accepted. No Box trucks.

Disposal Fees Are Eligible for a $5.00 Credit If You Bring Two (2) Kitchen Sized Trash Bags of Acceptable Recyclable Materials*

**Recyclable Materials Accepted (NO CHARGE)*
Cardboard (Flattened)
Aluminum / Steel / Tin Cans and Empty Aerosol Bottles
Mixed Paper (newspapers, magazines, phone books, junk mail, cereal boxes, etc.)
Plastic Containers (water / soda / cleaning / bathroom / food and beverage)
NO Styrofoam or Plastic Bags

Televisions / Computers / Monitors / Electronics
Residents – NO CHARGE
Businesses - $0.30 Per Pound

White Goods (Appliances) / Scrap Metal – NO CHARGE
No Propane or Gas Cylinders. Any drum or tank must be open (top, bottom, side) Fluids must be drained from any power equipment.

Used Tires – Tires Delivered By Individuals Residing in Cabarrus County Will Be Accepted in Loads of Five Or Less at NO CHARGE
2:40:36

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

General Board Discussion

A discussion ensued. During discussion, Commissioner Shue commented on concerns on the continuing escalation of operational costs for the schools. He also expressed concerns that personnel costs, which is the responsibility of the State, is shifting considerably more to the County.

Also, during discussion, Commissioner Honeycutt commented on the County tax rate.

There was lengthy discussion that included the aforementioned topics, debt bond ratings, etc.

Adjourn

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the meeting adjourned at 7:50 p.m.

_____
Lauren Linker, Clerk to the Board

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The Board of Commissioners for the County of Cabarrus met in regular session in the Commissioners' Meeting Room at the Cabarrus County Governmental Center in Concord, North Carolina at 6:30 p.m. on Tuesday, April 19, 2022.

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

live broadcast at 6:30 p.m. on Channel 22
https://www.youtube.com/cabarruscounty
https://www.cabarruscounty.us/cabcotv
1-980-729-7942 PIN 460 192 370#

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

Also present were Mike Downs, County Manager; Richard M. Koch, County Attorney; Rodney Harris, Deputy County Manager; and Lauren Linker, Clerk to the Board.

Chairman Morris called the meeting to order at 6:31 p.m.

Chairman Morris led the Pledge of Allegiance.

(A) APPROVAL OR CORRECTION OF MINUTES

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved the minutes of February 25, 2022 (Board Retreat) as presented.

(B) APPROVAL OF THE AGENDA

Chairman Morris reviewed the following changes to the agenda.

Additions:
New Business
G-1 County Manager - Public Private Partnership for Library and Senior Center Resolution

G-2 ITS - Memorandum of Understanding with Charter Communications to Support Application for GREAT Grant

Closed Session
K-1 Closed Session - Pending Litigation and Acquisition of Real Property

UPON MOTION of Commissioner Shue, seconded by Commissioner Strang and unanimously carried, the Board approved the agenda as amended.

(C) RECOGNITIONS AND PRESENTATIONS

(C-1) Active Living and Parks - Older Americans Month Proclamation

Myra Baumgardner, Cabarrus County Senior Centers Advisory Council Chair, read the proclamation aloud. Ms. Baumgardner issued an invitation to all senior citizens to participate in upcoming senior events and activities.

UPON MOTION of Commissioner Strang, seconded by Vice Chairman Kiger and unanimously carried, the Board adopted the Older Americans Month proclamation.

Proclamation No. 2022-06

OLDER AMERICANS MONTH 2022
A PROCLAMATION

Whereas, Cabarrus County includes a growing number of older Americans who contribute their strength, wisdom, and experience to our community; and

Whereas, communities benefit when people of all ages, abilities, and backgrounds are welcomed, included, and supported; and

Whereas, Cabarrus County Senior Centers Advisory Council recognizes our need to create a community that provides the services and supports older Americans need to thrive and live independently for as long as possible; and

Whereas, Cabarrus County Senior Centers Advisory Council can work to build an

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even better community for our older residents by:

- Planning programs that encourage independence.
- Ensuring activities are responsive to individual needs and preferences.
- Increasing access to services that support aging in place.

Now, therefore, the Cabarrus County Board of Commissioners do hereby proclaim May 2022 to be Older Americans Month. We urge every resident to recognize the contributions of our older citizens, help to create an inclusive society, and join efforts to support older Americans' choices about how they age in their communities.

Adopted this 19th day of April 2022.

/s/ Stephen M. Morris_____
Stephen M. Morris, Chairman
Board of Commissioners

(D) INFORMAL COMMENTS

Chairman Morris opened the meeting for Informal Public Comments at 6:37 p.m. He stated each speaker would be limited to three minutes.

Marvin Bost, resident of 3150 Mount Pleasant Road in Concord, commented on agriculture at the Cabarrus County Fair.

Jerry Anderson, resident of 133 Kennedy Avenue in Kannapolis, commented past issues with the Department of Human Services.

Jeeter Anderson, resident of 133 Kennedy Avenue in Kannapolis, commented past issues with the Department of Human Services.

Due to the inappropriate content of Jeeter Anderson's comments, Commissioner Shue requested Mr. Anderson's comment be terminated and he be escorted out of the building. Mr. Anderson was allowed to finish his comments.

There was no one else 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 - Senior Center Grants

Staff presented information regarding the Senior Center General Purpose and Health Promotion and Disease Prevention grant fund updates (state approved budget) and associated budget amendments at the work session. The match for both grants is budgeted in the senior center salary accounts 9101 and 9103.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the budget amendment.

Date: 4/19/2022 **Amount:** 2,618.00

Dept. Head: Londa Strong **Department:** Active Living & Parks

☐ **Internal Transfer Within Department** ☐ **Transfer Between Departments/Funds** ☑ **Supplemental Request**

Grant fund account updates (state approved budget) and associated budget amendments. The match for both grants are budgeted in salary accounts 00198145-9101 and 00198145-9103.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	6	8145-6364-SCGP	Senior Center General Purpose - Rev	7,010.00	118.00		7,128.00
001	9	8145-9417-SCGP	Senior Center General Purpose - Exp.	7,010.00	118.00		7,128.00
001	6	8145-6828-HPDP	Health Promotion Desease Prevention Rev.	4,680.00	2,500.00		7,180.00
001	9	8145-9356-WELL	Health Promotion Desease Prevention Exp.	4,500.00	2,500.00		7,000.00
				23,200.00	5,236.00	-	28,436.00

(F-2) Appointments - Nursing Home Community Advisory Committee

Karen Thompson's term on the Nursing Home Community Advisory Committee ends April 30th. Ms. Thompson would like to serve another term. She has served

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on this board since 2009. An exception to the length of service provision of the Appointment Policy will be needed for her.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board reappointed Karen Thompson to the Nursing Home Community Advisory Committee for a three-year term ending April 30, 2025; included an exception to the length of service provision of the Appointment Policy.

(F-3) Appointments (Removals) - Industrial Facilities and Pollution Control Financing Authority

Sherrill Laney's term on the Industrial Facilities and Pollution Control Financing Authority ended in January. He is not interested in serving another term. Mr. Laney has served on this board since 1996.

There are no current applications on file. The Authority meets on an as-needed basis and the County Attorney serves as the contact for this Authority.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board removed Sherrill Laney from the Industrial Facilities and Pollution Control Financing Authority roster and thanked him for his many years of service.

(F-4) BOC - Resolution Dissolving Advisory Board

The Animal Protection Advisory Board was created via resolution by the Cabarrus County Board of Commissioners in 2015 to review the Animal Shelter's policies and procedures when the Humane Society of Concord and Greater Cabarrus County operated the facility. Since then, the Animal Shelter has shifted under the oversight of the Sheriff. The board served strictly as an advisory board. They do not hold a supervisory role to the Animal Shelter or the Sheriff's Office. The current members were contacted, there was little response and no commitment of leadership. Animal Shelter and Sheriff's Office staff feel under the current organizational structure they are able to achieve the necessary goals without an advisory board.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the resolution.

Resolution No. 2022-13

A RESOLUTION DISSOLVING THE
CABARRUS COUNTY ANIMAL PROTECTION ADVISORY BOARD

WHEREAS, the Board of Commissioners established the Animal Protection Advisory Board in Resolution 2015-19 to review the Animal Shelter's policies and procedures when the Humane Society of Concord and Greater Cabarrus County operated the facility; and

WHEREAS, the Board served as a resource for mitigating challenges and a sounding board for new ideas in a non-supervisory nature when the Human Society operated the shelter; and

WHEREAS, the Human Society no longer operates the Animal Shelter, which is now under the control and oversight of the Sheriff; and

WHEREAS, the Animal Protection Advisory Board met monthly and has not been active since their last meeting in September of 2019; and

WHEREAS, the Board of Commissioners may create, change, abolish, and consolidate offices, positions, departments, boards, commissions, and agencies of the county government pursuant to N.C.G.S. § 153A-76, which includes the Animal Protection Advisory Board.

NOW, THEREFORE BE IT RESOLVED that the Cabarrus County Board of Commissioners hereby dissolves the Cabarrus County Animal Protection Advisory Board, effective as of April 19, 2022.

ADOPTED this 19th day of April, 2022.

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

Attest:

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/s/ Lauren Linker___
Clerk to the Board

(F-5) DHS - Transportation Drug and Alcohol Policy

Cabarrus County Transportation provides public transit and paratransit services for the residents of Cabarrus County. Part of our mission is to ensure that this service is delivered safely, efficiently, and effectively by establishing a drug and alcohol-free work environment, and to ensure that the workplace remains free from the effects of drugs and alcohol in order to promote the health and safety of employees and the general public. In keeping with this mission, Cabarrus County Transportation declares that the unlawful manufacture, distribution, dispense, possession, or use of controlled substances or misuse of alcohol is prohibited for all employees.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved and adopted the Drug and Alcohol Policy.

(F-6) DHS - Transportation Federal Transit Administration Resolution

The North Carolina Department of Transportation Public Transportation Division will no longer administer the Federal Transit Administration 5307 grant for North Carolina. Cabarrus County will now have to begin applying directly to the Federal Transit Administration for this Grant. In order to be set up with the Federal Transit Administration we will need a resolution approved giving the County Manager and Cabarrus County the authority to apply directly to the Federal government for 5307 funds.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved the Federal Transit Administration resolution.

Resolution No. 2022-14

FEDERAL TRANSIT ADMINISTRATION RESOLUTION

Resolution authorizing the filing of applications with the Federal Transit Administration, an operating administration of the United States Department of Transportation, for federal transportation assistance authorized by 49 U.S.C. Chapter 53; title 23, United States Code, or other federal statutes administered by the Federal Transit Administration.

WHEREAS, the Federal Transit Administrator has been delegated authority to award federal financial assistance for a transportation project;

WHEREAS, the grant or cooperative agreement for federal financial assistance will impose certain obligation upon the applicant, and may require the applicant to provide the local share of the project cost;

WHEREAS, the applicant has or will provide all annual certifications and assurances to the Federal Transit Administration required for the project;

NOW, THEREFORE, BE IT RESOLVED BY THE CABARRUS COUNTY BOARD OF COMMISSIONERS

1. That The County Manager is authorized to execute and file an application for federal assistance on behalf of Cabarrus County with Federal Transit Administration for federal Transit Administration for federal assistance authorized by 49 U.S.C Chapter 53, title 23, United States Code, or other federal statues authorizing a project administered by the Federal Transit Administration. Cabarrus County has received authority from the City of Concord to apply for Urbanized Area Formula Program Assistance. The City of Concord North Carolina is the designated recipient as defined by 49 U.S.C. 5307(a)(2)

2. That the County Manager is authorized to execute and file with its applications the annual certifications and assurances and other documents the Federal Transportation Administration requires before awarding a federal assistance grant or cooperative agreement.

3. That the County Manager is authorized to execute grant and cooperative agreements with the Federal Transit Administration on behalf of Cabarrus County.

Adopted this 19th day of April, 2022.

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/s/ Stephen M. Morris
Stephen M. Morris, Chairman

Attest:

/s/ Lauren Linker
Clerk to the Board

(F-7) DHS - Transportation System Safety Plan

The Transportation System Safety Plan is a plan to prepare for workplace emergencies. By auditing the workplace, training employees, obtaining and maintaining the necessary equipment, and by assigning responsibilities, human life and company resources will be preserved. The intent of this plan is to ensure all employees a safe and healthful workplace. Those employees assigned specific duties under this plan will be provided the necessary training and equipment to ensure their safety. This plan applies to emergencies that could be reasonably expected in our workplace such as fire/smoke, tornadoes, bomb threats, leaks, etc.

This emergency action plan will be reviewed annually and updated as needed to maintain compliance with applicable regulations and standards and remain up-to-date. Workplace inspection reports and incident reports will be maintained and used to provide corrections and improvements to the plan.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved and adopted the System Safety Plan.

(F-8) Finance - American Rescue Plan Act Funds for Broadband and Nonprofits

Along with unallocated funds several nonprofits decided not to accept the American Rescue Plan Act Fund. If the Board approves the funds will be allocated to:

1. Completing Access to Broadband (CAB) - $2,000,000 – county match to expand broadband in rural/underserved communities.
2. Habitat for Humanity - $500,000 – additional funds for the critical home repair program.
3. Education Foundation - $164,090 – funding needed to pilot Reading + Mentoring 4 Success program to address learning loss.
4. Conflict Resolution Center - $21,361 – funding to address lost revenue resulting from the pandemic

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved using American Rescue Plan Act Funds for the Broadband and additional nonprofits and the associated budget amendment.

Date: 4/19/2022 **Amount:** 2,685,451

Dept. Head: Wendi Heglar **Department:** Finance

☑ **Internal Transfer Within Department** ☐ **Transfer Between Departments/Funds** ☐ **Supplemental Request**

Allocate ARP funds to broadband and additional nonprofits

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
440	9	1925 974914 ARP20	Wings of Eagle Ranch	57,054		57,054	-
440	9	1925 974914 ARP27	Charity Baptist Ministries	70,000		70,000	-
440	9	1925 974914 ARP33	Mt. Pleasant Food Ministry	3,800		3,800	-
440	9	1925 974914 ARP47	Bands of Concord	6,379		6,379	-
440	9	1925 974914 ARP41	Habitat for Humanity	463,282	500,000		963,282
440	9	1925 974914 ARP62	Education Foundation	-	164,090		164,090
440	9	1925 974914 ARP63	Conflict Resolution Center	-	21,361		21,361
440	9	1925 9397 ARP	Miscellaneous	246,049		246,049	-
440	9	1925 974914 ARP55	Small Business Grants	2,500,000		120,000	2,380,000
440	9	1925 974914 ARP60	Mortgage	675,000		182,169	492,831
001	9	1925 940004	Broadband	-	2,000,000		2,000,000
001	9	2110 9101	Salaries and Wages Sheriff	10,493,074		2,000,000	8,493,074

(F-9) Finance - American Rescue Plan Act Funds for Cooperative Christian Ministry

Cooperative Christian Ministries received a $2,000,000 allocation of ARPA funds. They would like to include the Huddle Housing as an additional approved project. The project is described below:

Establish a Huddle Housing community to provide safe homes and case management for individuals struggling on low fixed incomes. Huddle Housing will provide long-term housing solutions for chronically homeless adults and those struggling on low and extremely low fixed incomes (e.g. – veterans, seniors, and individuals on disability who are capable of self-care). Include approximately 15 units and a community center.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved using American Rescue Plan Act Funds for the Huddle Housing Project.

(F-10) Finance - Appropriate Insurance Refund for Ambulance Repair

An ambulance was involved in an accident on October 23, 2021. The chassis was totaled, and the box was remounted onto a new chassis. Insurance funds were received to cover the costs.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the budget amendment.

Date: 4/19/2022 **Amount:** 141,613.00

Dept. Head: Suzanne Burgess for Kyle Bilafer **Department:** ISF - Property and Liability

☐ **Internal Transfer Within Department** ☐ **Transfer Between Departments/Funds** ☑ **Supplemental Request**

This budget amendment is to recognize insurance refunds, decrease insurance and bonds expenditure line item and transfer funds to EMS motor vehicle account to repair a wrecked ambulance involved in an accident.

	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
600	6	1919-6804	INSURANCE REFUNDS	20,000.00	61,613.00	-	81,613.00
600	9	1919-9704	CONTRIBUTION TO GENERAL FUND	68,680.00	80,000.00	-	148,680.00
600	9	1919-9640	INSURANCE AND BONDS	849,994.00	-	18,387.00	831,607.00
001	6	2730-6931	Contribution From Internal Service Fund	-	80,000.00	-	80,000.00
001	9	2730-9863	Motor Vehicles	672,652.26	80,000.00	-	752,652.26

(F-11) Finance - Debt Refunding of Limited Obligations Bonds - 2022A

The County's underwriter, Piper Sandler & Co., has advised, given appropriate market conditions, to refund all or a portion of 2020A Limited Obligation Bonds. The Public Hearing was held March 21, 2022.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the resolution approving refinancing of prior installment financing contract financings in an aggregate principal amount up to $130,000,000; the execution and delivery by the Cabarrus County Development Corporation of one or more series of limited obligation bonds related thereto; authorizing the execution and delivery of related documents in connection therewith; and providing for certain other related matters.

Resolution No. 2022-15

RESOLUTION APPROVING REFINANCING OF PRIOR INSTALLMENT FINANCING CONTRACT FINANCINGS IN AN AGGREGATE PRINCIPAL AMOUNT UP TO $130,000,000; THE EXECUTION AND DELIVERY BY THE CABARRUS COUNTY DEVELOPMENT CORPORATION OF ONE OR MORE SERIES OF LIMITED OBLIGATION BONDS RELATED THERETO; AUTHORIZING THE EXECUTION AND DELIVERY OF RELATED DOCUMENTS IN CONNECTION THEREWITH; AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS

WHEREAS, the Board of Commissioners desires to approve a proposed plan of refinancing in an aggregate principal amount of up to $130,000,000, which plan would involve the entry by the County into one or more installment financing contracts (or amendments to one or more outstanding installment financing contracts) with the Cabarrus County Development Corporation (the "Corporation") or one or more third parties pursuant to North Carolina General Statutes §160A-20, as amended, the proceeds of which would be used to refinance all or a portion of one or more installment financing contracts previously executed and delivered by the County, which prior installment financing contracts paid all or a portion of the costs of acquiring, constructing and equipping various public facilities and related improvements and costs (collectively, the "Refinanced Projects"), and under said one or more installment financing contracts (or amendments to one or more outstanding installment financing contracts) the County would secure the repayment by the County of the moneys advanced pursuant to such one or more installment financing contracts (or

amendments to one or more outstanding installment financing contracts) by granting a security interest in and lien on all or some portion of the Refinanced Projects and/or in all or some portion of the real property on which the Refinanced Projects are located;

WHEREAS, as part of said proposed plan of refinancing, the Corporation will execute and deliver one or more series of Limited Obligation Bonds in said one or more installment financing contracts (or amendments to one or more outstanding installment financing contracts) in an aggregate principal amount not exceeding $130,000,000 to finance the advancement of moneys to the County pursuant to said one or more installment financing contracts (or amendments to one or more outstanding installment financing contracts) between the County and the Corporation or one or more third parties;

WHEREAS, there have been submitted to this meeting draft forms of the following documents (the "Financing Documents") with respect to the refinancing of said one or more prior installment financing contracts and the Refinanced Projects:

(1) an Installment Financing Contract, proposed to be dated on or about June [1], 2022 (or such other date(s) as may be selected by the County), between the County and the Corporation (or one or more third parties) as counterparty (the "2022A Contract(s)"), pursuant to which the Corporation (or such one or more third parties) will advance moneys to the County to refinance all or a portion of the Prior Contract (as defined in the 2022A Contract(s)) and the Refinanced Projects financed thereby and the County agrees to make periodic installment payments (the "Installment Payments") to repay the moneys so advanced, with or without interest, as applicable;

(2) a Deed of Trust, Security Agreement and Fixture Filing (the "2022A Deed of Trust"), proposed to be dated on or about June [1], 2022, among the County as Grantor, the Corporation (or such one or more third parties) as Beneficiary and the trustee named therein, by which the County would secure its obligations to the Corporation (or such one or more third parties) under the 2022A Contract(s); and

(3) an Indenture of Trust, proposed to be dated on or about June [1], 2022 (the "2022A Trust Indenture"), between the Corporation and the trustee named therein, as trustee (the "2022A Trustee"), pursuant to which there may be executed and delivered from time to time Certificates of Participation and/or Limited Obligation Bonds, including, without limitation, the Limited Obligation Refunding Bonds (County of Cabarrus, North Carolina Installment Financing Contract), Series 2022A (collectively, the "2022A Certificates and/or Bonds"), the proceeds of which will be used to advance the moneys to the County under the 2022A Contract(s); and

WHEREAS, the obligations of the County to make Installment Payments and other payments pursuant to the 2022A Contract(s) shall constitute limited obligations of the County payable solely from currently budgeted appropriations of the County and shall not constitute a pledge of the faith and credit of the County within the meaning of any constitutional debt limitation;

WHEREAS, no deficiency judgment may be rendered against the County in any action for breach of a contractual obligation under the Contract(s), and the taxing power of the County is not and may not be pledged in any way directly or indirectly or contingently to secure any moneys due under the Contract(s); and

WHEREAS, the Board of Commissioners desires to approve the Financing Documents and to authorize other actions in connection therewith;

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

Section 1. All actions taken by or on behalf of the County to date to effectuate the proposed plan of refinancing, including the selection of Piper Sandler & Co., as Underwriter and/or Placement Agent and Nexsen Pruet, PLLC, as special counsel, are hereby ratified, approved and authorized pursuant to and in accordance with the transactions contemplated by the Financing Documents.

Section 2. The Board of Commissioners hereby finds and confirms that (i) the refinancing of all or a portion of the Prior Contract previously executed and delivered by the County and the Refinanced Projects by one or more installment financing contracts to be executed and delivered by the County is necessary and expedient for the County; (ii) the refinancing of all or a portion of the Prior Contract previously executed and delivered by the County and the Refinanced Projects by one or more installment financing contracts to be executed and delivered by the County, under the circumstances, is preferable to

a bond issue by the County; (iii) the sums to fall due under said one or more installment financing contracts to be executed and delivered by the County are adequate and not excessive for their proposed purpose; (iv) the County's debt management procedures and policies are good and its debt will continue to be managed in strict compliance with law; (v) the increase in taxes, if any, necessary to meet the sums to fall due under said one or more installment financing contracts to be executed and delivered by the County will not be excessive; and (vi) the County is not in default regarding its debt service obligations.

Section 3. The refinancing of all or a portion of the Prior Contract and the Refinanced Projects, and the granting of security interests therein, all as provided in the Financing Documents referenced in this Resolution, are hereby ratified and approved.

Section 4. Each the 2022A Contract(s) and the Deed of Trust is hereby approved in substantially the form submitted to this meeting, and each of the Chairman of the Board of Commissioners or the County Manager is hereby authorized to execute and deliver each of those documents in the name and on behalf of the County, with such changes, insertions or omissions as the persons executing such documents may approve, including but not limited to changes, insertions or omissions related to obtaining a policy of municipal bond insurance with respect to all or a portion of any Certificates and/or Bonds, their execution and delivery thereof to constitute conclusive evidence of such approval. The County Clerk is hereby authorized to affix the seal of the County to each of said documents as may be appropriate and to attest to the same.

Section 5. The 2022A Trust Indenture (including the form of Certificate and/or Bond) is hereby approved in substantially the form submitted to this meeting, with such changes, insertions or omissions as appropriate, including but not limited to changes, insertions or omissions related to obtaining a policy of municipal bond insurance with respect to all or a portion of any Certificates and/or Bonds, as the representative(s) of the County executing the 2022A Contract(s) may approve, the execution and delivery of the 2022A Contract(s) to constitute conclusive evidence of such approval. The Board of Commissioners hereby approves the sale of Certificates and/or Bonds by the Corporation in an aggregate principal amount not in excess of the amount of moneys to be advanced to the County pursuant to the 2022A Contract(s).

Section 6. Each of the Chairman of the Board of Commissioners, the County Manager and the Finance Director are authorized to approve all details of the refinancing of all or a portion of the Prior Contract and the related portion of the Refinanced Projects, including, without limitation, the amount advanced under the 2022A Contract(s) and the aggregate principal amount of the 2022A Limited Obligation Refunding Bonds (which shall not exceed $130,000,000), the maturities, the principal amounts and the interest amounts of the Installment Payments and the 2022A Limited Obligation Refunding Bonds, which interest amounts (calculated with respect to the 2020A Limited Obligation Refunding Bonds) shall not exceed [6.5]% per annum on an effective interest cost basis, the prepayment terms and prices (which shall not exceed 103% of the principal amount being prepaid) and the Underwriters' discount (exclusive of any original issue discount) or Placement Agents' compensation (which shall not exceed 2.0% of the principal amount of the 2022A Limited Obligation Refunding Bonds). Execution of the 2022A Contract(s) by the Chairman of the Board of Commissioners or the County Manager shall conclusively evidence such approval of all such details of said refinancing.

Section 7. The Chairman of the Board of Commissioners, the County Manager, the Finance Director and the County Attorney are hereby authorized to take any and all such further action, including approval of modifications to the Financing Documents, and to execute and deliver for and on behalf of the County such other documents and certificates (including, without limitation, agreements with securities depositories, financing statements, one or more escrow deposit agreements, one or more contracts of purchase or purchase agreements, one or more placement agreements, one or more private placement agreements or other offering documents or memoranda, tax certificates and agreements and other documents and agreements (including repurchase agreements) relating to the investment of the proceeds from the execution and delivery of the 2022A Contract(s) as they may deem necessary or advisable to carry out the intent of this resolution and to effect the refinancing pursuant to the 2022A Contract(s) and the other Financing Documents. The Clerk to the Board is hereby authorized to affix the seal of the County to such documents and certificates as may be appropriate and to attest to the same and to execute and deliver the same as may be needed. In addition, said officers are hereby authorized to cooperate with the Underwriters and/or Placement Agents in preparing and filing such filings under state securities or "blue sky" laws (including special consents to service of process) as the Underwriters and/or Placement Agents may

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request and as the Chairman of the Board of Commissioners, the County Manager or the Finance Director shall determine.

Section 8. The Finance Director shall prepare and file a sworn statement of debt with the LGC and the Clerk to the Board in accordance with North Carolina General Statutes Section 159-150.

Section 9. The County covenants that, to the extent permitted by the Constitution and laws of the State of North Carolina, it will do and perform all acts and things to comply with the requirements of the Internal Revenue Code of 1986, as amended (the "Code"), in order to assure that interest paid with respect to the 2022A Limited Obligation Refunding Bonds will not be includable in the gross income of the owners thereof for purposes of federal income taxation, except to the extent that the County obtains an opinion of bond counsel to the effect that noncompliance would not result in interest with respect to the 2022A Limited Obligation Refunding Bonds being includable in the gross income of the owners of the 2022A Limited Obligation Refunding Bonds for purposes of federal income taxation.

Section 10. This Resolution shall become effective immediately upon its adoption.

Thereupon, upon motion of Commissioner Diane R. Honeycutt, seconded by Commissioner Lynn W. Shue, the foregoing resolution entitled "RESOLUTION APPROVING REFINANCING OF PRIOR INSTALLMENT FINANCING CONTRACT FINANCINGS IN AN AGGREGATE PRINCIPAL AMOUNT UP TO $130,000,000; THE EXECUTION AND DELIVERY BY THE CABARRUS COUNTY DEVELOPMENT CORPORATION OF ONE OR MORE SERIES OF LIMITED OBLIGATION BONDS RELATED THERETO; AUTHORIZING THE EXECUTION AND DELIVERY OF RELATED DOCUMENTS IN CONNECTION THEREWITH; AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS" was adopted and passed by the following roll call vote:

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

NOES: None

(F-12) Finance - Fire District Property Tax Budget Amendment

This budget amendment will increase Fire Districts' current year property tax collections as well as increase related districts' turnovers. Per the Fire Tax Districts budget ordinance, Section V. (7), upon notification of funding increases of revenues, the Manager may adjust budgets to match.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the budget amendment.

Date: 4/19/2022 **Amount:** 535,000.00

Dept. Head: Wendi Heglar (Prepared by Katrina Myers-Arnold) **Department:** Finance

☐ Internal Transfer Within Department ☐ Transfer Between Departments/Funds ☑ Supplemental Request

To increase Fire Districts' current year property tax collections as well as increase related districts' turnovers. Per the Fire Tax Districts budget ordinance, Section V. (7), upon notification of funding increases of revenues, the Manager may adjust budgets to match.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
430	6	2710-6011	Property Tax Current Year Coll	5,909,748.00	535,000.00		6,444,748.00
430	9	2710-975601	Con Rural	51,095.00	5,000.00		56,095.00
430	9	2710-9773	Rimer Fire	212,868.00	25,000.00		237,868.00
430	9	2710-9774	Mt Mitchel	103,322.00	35,000.00		138,322.00
430	9	2710-9775	Gold H VFD	41,311.00	5,000.00		46,311.00
430	9	2710-9776	Mt Plesant	565,737.00	35,000.00		600,737.00
430	9	2710-9777	Kann Rural	222,337.00	10,000.00		232,337.00
430	9	2710-9778	Georgevill	276,666.00	25,000.00		301,666.00
430	9	2710-9779	Flowes St	449,361.00	20,000.00		469,361.00
430	9	2710-9780	Odell	834,387.00	85,000.00		919,387.00
430	9	2710-9781	Richf VFD	11,363.00	5,000.00		16,363.00
430	9	2710-9783	Jackson Pk	237,112.00	25,000.00		262,112.00
430	9	2710-9784	Cold Water	317,938.00	25,000.00		342,938.00
430	9	2710-9785	Allen	465,666.00	50,000.00		515,666.00
430	9	2710-9786	Midland	775,508.00	75,000.00		850,508.00
430	9	2710-9788	Northeast	190,941.00	25,000.00		215,941.00
430	9	2710-9798	Harris VFD	1,154,136.00	85,000.00		1,239,136.00

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(F-13) Finance - Resolution Approving Installment Financing Contract 2022B Draw-Down LOBS for Various School and County Projects Up to $160,000,000

Cabarrus County plans to enter into one or more short and/or long-term installment financing contracts, including the use of a drawn down loan structure with the Cabarrus County Development Corporation or one or more third parties, for an amount not to exceed $160,000,000 to finance all or a portion of the cost of constructing and equipping public school and county facilities and various real and personal property improvements. The public hearing was held March 21, 2022.

The next required step in the financing is the final approval by adoption of the attached Resolution approving the installment contract financing in an amount not-to-exceed $160,000,000. The LOBS are scheduled for issuance in June 2022, subject to approval by the Local Government Commission.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the Resolution Approving Installment Contract Financing for Various Public Projects in an Aggregate Principal Amount up to $160,000,000 and Execution and Delivery by the Cabarrus County Development Corporation of Limited Obligation Bonds Related thereto, Authorizing the Execution and Delivery of Related Documents in Connection therewith, and Providing for Certain other Related Matters.

Resolution No. 2022-16

RESOLUTION APPROVING LONG-TERM INSTALLMENT CONTRACT FINANCINGS OF VARIOUS PUBLIC PROJECTS IN AN AGGREGATE PRINCIPAL AMOUNT UP TO $160,000,000; AUTHORIZING INTERIM INSTALLMENT CONTRACT FINANCINGS FOR SUCH PROJECTS IN AN AGGREGATE PRINCIPAL AMOUNT UP TO $160,000,000; AUTHORIZING THE EXECUTION AND DELIVERY BY THE CABARRUS COUNTY DEVELOPMENT CORPORATION OF ONE OR MORE SERIES OF LIMITED OBLIGATION BONDS AND/OR CERTIFICATES OF PARTICIPATION RELATED THERETO, AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS

WHEREAS, the Board of Commissioners desires to undertake a proposed plan of financing in an aggregate principal amount of up to $160,000,000, which plan would involve the entry by the County into one or more long-term installment financing contract(s) with the Cabarrus County Development Corporation (the "Corporation") or one or more other third parties pursuant to North Carolina General Statutes §160A-20, as amended, the proceeds of which would be used to pay all or a portion of the costs of (i) the acquisition, construction, installation and equipping of one or more new buildings to be used as new court house facilities for the County, (ii) various site improvements related thereto, (iii) the acquisition, construction, installation and equipping of a new public middle school, (iv) the acquisition, construction, installation and equipping of a new public high school, (v) the acquisition, construction, installation and equipping of a new replacement public elementary school, (vi) the acquisition, construction, installation and equipping of a new emergency services headquarters and related facilities, (vii) the acquisition, construction, installation and equipping of a new public library and senior center, (viii) the acquisition, construction, installation and equipping of a new emergency equipment warehouse/information technology facility, (ix) the acquisition of land for a new regional public park facility, (x) the acquisition, construction, installation and equipping of multiple improvements at Frank Liske Park, (xi) the acquisition, construction, installation and equipping of a new radio tower, (xii) the acquisition, construction, installation and equipping of a new public park facility, (xiii) the construction, installation and equipping of replacement parking lots and driveways at Mt. Pleasant High School, (xiv) the construction, installation and equipping of roof replacements at various public school sites, (xv) the acquisition, construction, installation and equipping of one or more new public schools and related facilities, (xvi) the acquisition, construction, installation and equipping of one or more new public buildings and related facilities, (xvii) the acquisition of any necessary rights-of-way and easements related to each of the foregoing (i) through (xvi) and (xviii) various real and personal property improvements related to each of the foregoing (i) through (xvi) (collectively, the "2022B Projects"), and under said one or more long-term installment financing contract(s) the County would secure the repayment by the County of the moneys advanced pursuant to such one or more long-term installment financing contract(s) by granting a security interest in and lien on all or some portion of the 2022B Projects and/or all or some portion of the real property upon which the 2022B Projects are located;

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WHEREAS, as part of said proposed plan of financing, the Corporation may also execute and deliver one or more series of Limited Obligation Bonds and/or Certificates of Participation in said one or more long-term installment financing contract(s) in an aggregate principal amount not exceeding $160,000,000 to finance the advancement of moneys to the County pursuant to said one or more long-term installment financing contract(s) between the County and the Corporation or one or more other third parties;

WHEREAS, as part of the proposed plan of financing for the 2022B Projects, the Board of Commissioners further desires to authorize interim financing, which may utilize a draw-down loan structure, for all or some portion of the 2022B Projects in an aggregate principal amount of up to $160,000,000, which would involve the entry by the County into one or more short-term installment financing contract(s) with one or more third parties pursuant to North Carolina General Statutes §160A-20, as amended, the proceeds of which would be used to provide interim financing for all or some portion of the 2022B Projects pending execution and delivery of said one or more long-term financing contract(s) and the related Limited Obligation Bonds and/or Certificates of Participation, if any, and under said one or more short-term installment financing contract(s) the County would secure the repayment by the County of the moneys advanced pursuant to such short-term installment financing contract(s) by granting a security interest in and lien on all or some portion of the 2022B Projects and/or all or some portion of the real property upon which the 2022B Projects are located; and

WHEREAS, as part of said proposed plan of financing, the Corporation may also execute and deliver one or more series of Limited Obligation Bonds and/or Certificates of Participation in said one or more short-term installment financing contract(s) in an aggregate principal amount not exceeding $160,000,000 to finance the advancement of moneys to the County pursuant to said one or more short-term installment financing contract(s) between the County and the Corporation or one or more other third parties;

WHEREAS, there have been submitted to this meeting draft forms of the following documents (the "Financing Documents") with respect to the financing for the 2022B Projects:

(1) an Installment Financing Contract, proposed to be dated on or about June [1], 2022 (or such other date(s) as may be selected by the County), between the County and the Corporation (or one or more third parties) as counterparty (the "Contract(s)"), pursuant to which the Corporation (or such one or more third parties) will advance moneys to the County for the costs of the 2022B Projects and the County agrees to make periodic installment payments (the "Installment Payments") to repay the moneys so advanced, with or without interest, as applicable;

(2) a Deed of Trust, Security Agreement and Fixture Filing (the "Deed of Trust"), proposed to be dated on or about June [1], 2022, among the County as Grantor, the Corporation (or such one or more third parties) as Beneficiary and the trustee named therein, by which the County would secure its obligations to the Corporation (or such one or more third parties) under the Contract(s);

(3) an Indenture of Trust, proposed to be dated on or about June [1], 2022 (the "Trust Indenture"), between the Corporation and the trustee named therein, as trustee (the "Trustee"), pursuant to which there may be executed and delivered from time to time Certificates of Participation and/or Limited Obligation Bonds, including, without limitation, the Limited Obligation Bonds (County of Cabarrus, North Carolina Installment Financing Contract), Series 2022B (collectively, the "Certificates and/or Bonds"), the proceeds of which will be used to advance the moneys to the County under the Contract(s); and

(4) a Contract of Purchase to be dated on or about June [1], 2022 (the "Contract of Purchase"), pursuant to which the 2022B Limited Obligation Bonds would be purchased from time to time by the purchaser(s) of the 2022B Limited Obligation Bonds;

WHEREAS, the obligations of the County to make Installment Payments and other payments pursuant to the Contract(s) shall constitute limited obligations of the County payable solely from currently budgeted appropriations of the County and shall not constitute a pledge of the faith and credit of the County within the meaning of any constitutional debt limitation;

WHEREAS, no deficiency judgment may be rendered against the County in any action for breach of a contractual obligation under the Contract(s), and the taxing power of the County is not and may not be pledged in any way directly or indirectly or contingently to secure any moneys due under the Contract(s); and

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WHEREAS, the Board of Commissioners desires to approve the Financing Documents and to authorize other actions in connection therewith;

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

Section 1. All actions taken by or on behalf of the County to date to effectuate the proposed financing, including the selection of Nexsen Pruet, PLLC, as special counsel, are hereby ratified, approved and authorized pursuant to and in accordance with the transactions contemplated by the Financing Documents.

Section 2. The Board of Commissioners hereby finds and confirms that (i) the 2022B Projects and the financing thereof by one or more installment financing contracts is necessary and expedient for the County; (ii) financing of the 2022B Projects by one or more installment financing contracts, under the circumstances, is preferable to a bond issue by the County; (iii) the sums to fall due under said one or more installment financing contracts are adequate and not excessive for their proposed purpose; (iv) the County's debt management procedures and policies are good and its debt will continue to be managed in strict compliance with law; (v) the increase in taxes, if any, necessary to meet the sums to fall due under said one or more installment financing contracts will not be excessive; and (vi) the County is not in default regarding any of its debt service obligations.

Section 3. The acquisition, construction and equipping of the 2022B Projects, the financing thereof and the granting of security interests therein, all as provided in the Financing Documents referenced in this Resolution, are hereby ratified and approved.

Section 4. Each of the Contract(s), the Contract of Purchase and the Deed of Trust is hereby approved in substantially the form submitted to this meeting, and each of the Chairman of the Board of Commissioners or the County Manager is hereby authorized to execute and deliver each of those documents in the name and on behalf of the County, with such changes, insertions or omissions as the persons executing such documents may approve, including but not limited to changes, insertions or omissions related to obtaining a policy of municipal bond insurance with respect to all or a portion of any Certificates and/or Bonds, their execution and delivery thereof to constitute conclusive evidence of such approval. The County Clerk is hereby authorized to affix the seal of the County to each of said documents as may be appropriate and to attest to the same.

Section 5. The Trust Indenture (including the form of Certificate and/or Bond) is hereby approved in substantially the form submitted to this meeting, with such changes, insertions or omissions as appropriate, including but not limited to changes, insertions or omissions related to obtaining a policy of municipal bond insurance with respect to all or a portion of any Certificates and/or Bonds, as the representative(s) of the County executing the Contract(s) may approve, the execution and delivery of the Contract(s) to constitute conclusive evidence of such approval. The Board of Commissioners hereby approves the sale of Certificates and/or Bonds by the Corporation in an aggregate principal amount not in excess of the amount of moneys to be advanced to the County pursuant to the Contract(s).

Section 6. Each of the Chairman of the Board of Commissioners, the County Manager and the Director of Finance are authorized to approve all details of the financing of the 2022B Projects, including, without limitation, the amount advanced under the Contract(s) and the aggregate principal amount of any Certificates and/or Bonds (which shall not exceed $160,000,000), the maturities, the principal amounts and the interest amounts (if any) of the Installment Payments and any Certificates and/or Bonds, which interest amounts may be either fixed or variable rates and, if fixed rates, (calculated with respect to any Certificates and/or Bonds) shall not exceed [22.00%] per annum on an effective interest cost basis, the prepayment terms and prices (which shall not exceed [103]% of the principal amount being prepaid). Execution of the Contract(s) by the Chairman of the Board of Commissioners or the County Manager shall conclusively evidence such approval of all such details of said financing.

Section 7. The Chairman of the Board of Commissioners, the County Manager, the Director of Finance and the County Attorney are hereby authorized to take any and all such further action, including approval of modifications to the Financing Documents, and to execute and deliver for and on behalf of the County such other documents and certificates (including, without limitation, agreements with securities depositories, financing statements, one or more contracts of purchase or purchase agreements, one or more placement agreements, one or more private placement agreements or other offering documents or

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memoranda, tax certificates and agreements and other documents and agreements (including repurchase agreements) relating to the investment of the proceeds from the execution and delivery of the Contract(s)) as they may deem necessary or advisable to carry out the intent of this resolution and to effect the financing pursuant to the Contract(s) and the other Financing Documents. The County Clerk is hereby authorized to affix the seal of the County to such documents and certificates as may be appropriate and to attest to the same and to execute and deliver the same as may be needed.

Section 8. The Finance Director shall prepare and file a sworn statement of debt with the LGC and the Clerk to the Board in accordance with North Carolina General Statutes Section 159-150.

Section 9. The County covenants that, to the extent permitted by the Constitution and laws of the State of North Carolina, it will do and perform all acts and things to comply with the requirements of the Internal Revenue Code of 1986, as amended (the "Code"), in order to assure that interest paid with respect to the 2022B Limited Obligation Bonds will not be includable in the gross income of the owners thereof for purposes of federal income taxation, except to the extent that the County obtains an opinion of bond counsel to the effect that noncompliance would not result in interest with respect to the 2022B Limited Obligation Bonds being includable in the gross income of the owners of the 2022B Limited Obligation Bonds for purposes of federal income taxation.

Section 10. This Resolution shall become effective immediately upon its adoption.

Thereupon, upon motion of Commissioner Diane R. Honeycutt, seconded by Commissioner Lynn W. Shue, the foregoing resolution entitled "RESOLUTION APPROVING LONG-TERM INSTALLMENT CONTRACT FINANCINGS OF VARIOUS PUBLIC PROJECTS IN AN AGGREGATE PRINCIPAL AMOUNT UP TO $160,000,000; AUTHORIZING INTERIM INSTALLMENT CONTRACT FINANCINGS FOR SUCH PROJECTS IN AN AGGREGATE PRINCIPAL AMOUNT UP TO $160,000,000; AUTHORIZING THE EXECUTION AND DELIVERY BY THE CABARRUS COUNTY DEVELOPMENT CORPORATION OF ONE OR MORE SERIES OF LIMITED OBLIGATION BONDS AND/OR CERTIFICATES OF PARTICIPATION RELATED THERETO, AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS" was adopted and passed by the following vote:

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

NOES: None

(F-14) Fire Marshal's Office - Ordinance Approval

At the March 2022 meeting, the board took action and requested staff to forward GIS generated data to the Office of the State Fire Marshal reflecting the recommended fire tax district changes to the following districts: Flowes Store, Georgeville, Allen, Harrisburg, and Midland. No additional information is needed from the State Fire Marshal's Office to allow adoption of this ordinance.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the proposed fire district ordinance.

Ordinance No. 2022-16

AN ORDINANCE CHANGING THE BOUNDAIRES OF THE RURAL FIRE PROTECTION DISTRICTS WITHIN CABARRUS COUNTY

WHEREAS, notwithstanding N.C.G.S. 69-25.11, the Cabarrus County Board of Commissioners may change the boundaries of fire districts in Cabarrus County by ordinance pursuant to section 19.1 of Chapter 558 of the 1987 Session Laws, as added by N.C. Sess. Laws 2006-1, and amended by N.C. Sess. Laws 2010-17; and

WHEREAS, the Cabarrus County Board of Commissioners held a public hearing on this ordinance on March 21, 2022, after public notice was given on February 23, 2022; and

WHEREAS, a map showing the proposed changes to the rural fire protection districts within Cabarrus County were made available in the office of the Clerk to the Board of Commissioners; and

WHEREAS, no area in the proposed fire districts will be in more than one district; and

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WHEREAS, no area in the proposed fire districts will be within the corporate limits of a municipality.

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

Section 1. Revision of Rural Fire Protection District Boundaries.
The boundaries of the Rural Fire Protection Districts within Cabarrus County, North Carolina are revised as indicated in the map identified as "Proposed Fire Districts", which is attached to this ordinance and identified as Attachment A.

Sec. 2. Effective date.
This ordinance shall become effective on July 1, 2022.

ADOPTED this 19th day of April, 2022.

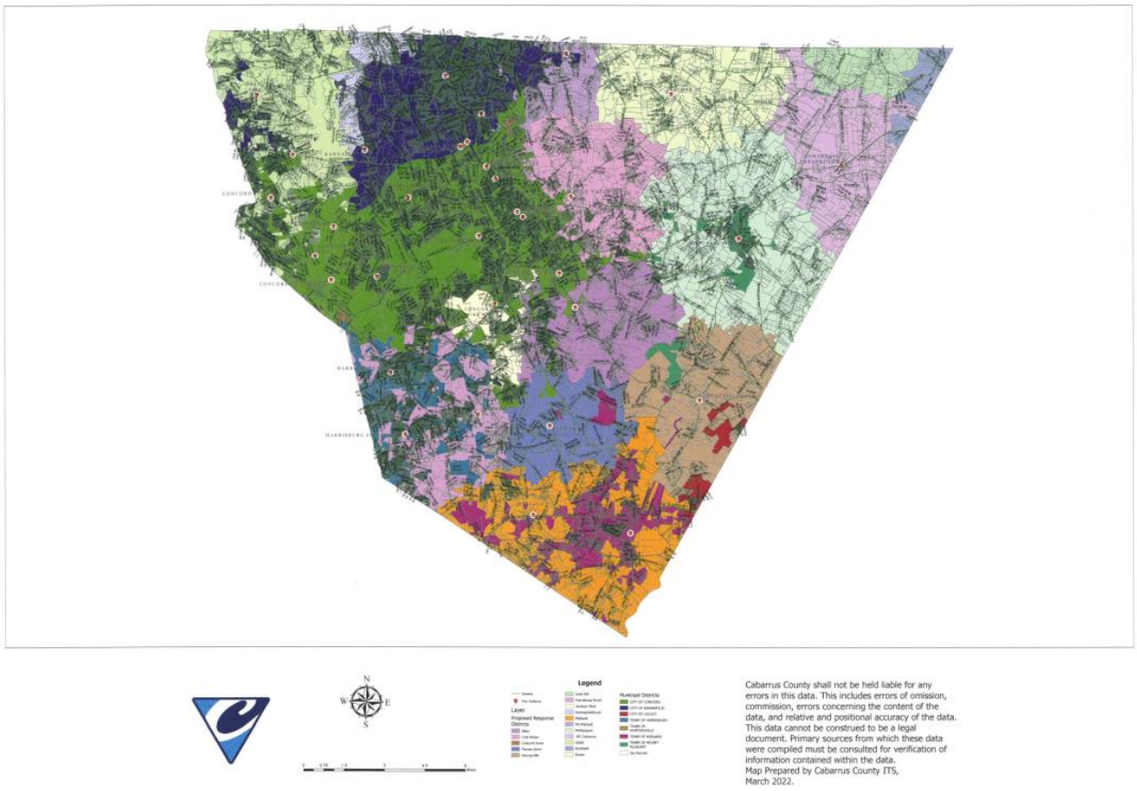
/s/ Stephen M. Morris
Stephen M. Morris, Chairman
Cabarrus County Board of Commissioners

Attest:

/s/ Lauren Linker
Clerk to the Board

Attachment A

Proposed Fire Districts



(F-15) Infrastructure and Asset Management - Mount Pleasant Library-Senior Center-Park Complex Update

Staff provided an update on the programming, community engagement, and cost estimating processes taking place for the planned Mount Pleasant Library-Senior Center-Park complex at the work session.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved the scope of the project and cost as outlined by county staff.

(F-16) Planning and Development - Community Development Division - Housing and Home Improvement Budget Amendment

Community Development staff has received $390 of program revenue for the Housing and Home Improvement program that is required by the grant rules to be allocated back to the program to expand services. The associated budget amendment is attached.

UPON MOTION of Commissioner Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board adopted the budget amendment.

Date: 4/19/2022 **Amount:** 390.00

Dept. Head: Kelly Sifford **Department:** Community Development

☐ **Internal Transfer Within Department** ☐ **Transfer Between Departments/Funds** ☑ **Supplemental Request**

Allocate Housing and Home Improvement Program consumer contributions per grant guidelines.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	6	3250-6622	Home Improvement Program Fees	370.00	390.00		760.00
001	9	3250-9493-HHIFA	HHIFA Operations	25,370.00	390.00		25,760.00

(F-17) Tax Administration - Refund and Release Reports – March 2022

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 Honeycutt, seconded by Commissioner Shue and unanimously carried, the Board approved the March 2022 Refund and Release Reports as submitted, including the NCVTS Refund Report, and granted authority to the Tax Collector to process the refunds and releases. The report is hereby incorporated into the minutes by reference and in on file with the Clerk to the Board.

(G) NEW BUSINESS

(G-1) County Manager - Public Private Partnership for Library and Senior Center Resolution

Rodney Harris, Deputy County Manager, requested the Board approve the resolution for entering into the lease related to the public-private partnership for the library and senior center in Afton Ridge.

UPON MOTION of Commissioner Strang, seconded by Commissioner Honeycutt and unanimously carried, the Board approved the resolution.

Resolution No. 2022-17

RESOLUTION APPROVING LEASE FINANCING OF CERTAIN REAL PROPERTY; THE EXECUTION AND DEVLIVERY THEREOF; AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS

WHEREAS, the County of Cabarrus, North Carolina (the "County") is a validly existing political subdivision of the State of North Carolina, existing as such under and by virtue of the Constitution, statutes and laws of the State of North Carolina (the "State");

WHEREAS, the County has the power, pursuant to § 160A-20 of the General Statutes of North Carolina to (1) purchase real and personal property, (2) enter into installment financing contracts in order to finance and refinance the purchase of real and personal property used, or to be used, for public purposes and (3) grant a security interest in some or all of the property purchased to secure repayment of the purchase price;

WHEREAS, the Board of Commissioners (the "Board") has determined that it is in the best interest of the County to finance all or a portion of the costs of acquisition of certain real property and improvements thereon (collectively, the "Property") through a financing lease between the County and CK LAKEPOINTE CORPORATE CENTER, LLC (the "Lease");

WHEREAS, a draft form of the Lease and the related exhibits and addendums thereto have been submitted to this meeting with respect to the proposed financing of the Property; and

DRAFT

WHEREAS, the obligations of the County to make lease payments and any other payments, if any, pursuant to the Lease shall constitute limited obligations of the County payable solely from currently budgeted appropriations of the County and shall not constitute a pledge of the faith and credit of the County within the meaning of any constitutional debt limitation;

WHEREAS, no deficiency judgment may be rendered against the County in any action for breach of a contractual obligation under the Lease, and the taxing power of the County is not and may not be pledged in any way directly or indirectly or contingently to secure any moneys due under the Lease; and

WHEREAS, the Board of Commissioners desires to approve the Lease and to authorize other actions in connection therewith;

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

Section 1. All actions taken by or on behalf of the County to date to effectuate the proposed financing are hereby ratified, approved and authorized pursuant to and in accordance with the transactions contemplated by the Lease.

Section 2. The Board of Commissioners hereby finds and confirms that (i) the financing of the Property through the Lease is necessary and expedient for the County; (ii) the financing of the Property through the Lease, under the circumstances, is preferable to a bond issue by the County; (iii) the sums to fall due under the Lease are adequate and not excessive for their proposed purpose; (iv) the County's debt management procedures and policies are good and its debt will continue to be managed in strict compliance with law; (v) the increase in taxes, if any, necessary to meet the sums to fall due under the Lease will not be excessive; and (vi) the County is not in default regarding any of its debt service obligations.

Section 3. Each of the Chairman of the Board of Commissioners, the County Manager and the Finance Director are authorized to approve all details of the financing of the Property, including, without limitation, the aggregate amount of the lease payments under the Lease (which shall not exceed $15,000,000). Execution of the Lease by the Chairman of the Board of Commissioners or the County Manager shall conclusively evidence such approval of all such details of said financing.

Section 4. The Chairman of the Board of Commissioners, the County Manager, the Finance Director and the County Attorney are hereby authorized to take any and all such further action, including without limitation filing one or more applications with the North Carolina Local Government Commission seeking approval of the plan of financing and approval of any modifications to the Lease and the related exhibits and addendums thereto, and to execute and deliver for and on behalf of the County such other documents and certificates as they may deem necessary or advisable to carry out the intent of this resolution and to effect the financing pursuant to the Lease and the related exhibits and addendums thereto. The County Clerk is hereby authorized to affix the seal of the County to such documents and certificates as may be appropriate and to attest to the same and to execute and deliver the same as may be needed.

Section 5. The Finance Director shall prepare and file a sworn statement of debt with the LGC and the Clerk to the Board in accordance with North Carolina General Statutes Section 159-150.

Section 6. This Resolution shall become effective immediately upon its adoption.

Thereupon, upon motion of Commissioner Barbara C. Strang, seconded by Commissioner Diane R. Honeycutt, the foregoing resolution entitled "RESOLUTION APPROVING LEASE FINANCING OF CERTAIN REAL PROPERTY; THE EXECUTION AND DELIVERY THEREOF; AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS" was adopted and passed by the following vote:

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

NOES: None

(G-2) ITS - Memorandum of Understanding with Charter Communications to Support Application for GREAT Grant

Todd Shanley, Chief Information Officer, presented a request for approval of a memorandum of understanding with Charter Communications to support an application for the GREAT (Growing Rural Economies with Access to Technology)

DRAFT

grant program. Mr. Shanley stated the proposal will extend broadband services to 250 customers in Cabarrus County that have less than 25 Mb download speeds. The project proposal exceeds $1 million, and the County's participation would be $50,000. He reviewed a map of the areas in the County that would be affected by this grant.

The GREAT Grant is a competitive grant program that provides funding to private sector broadband providers to deploy last-mile broadband infrastructure to unserved areas of North Carolina. The North Carolina Department of Information Technology administers the program. The Current Operations Appropriations Act of 2021, S.L. 2021-180, appropriated $350 million from the American Rescue Plan Act (ARPA) for the GREAT Grant program. The legislation also expanded eligibility for this round of funding. The GREAT Grant encourages private broadband provider grantees to partner with local governments by providing prioritizing projects with local monetary and non-monetary support.

Charter Communications has asked to partner with Cabarrus County to obtain a GREAT Grant. The attached Memorandum of Understanding documents that Cabarrus County supports Charter's application.

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

UPON MOTION of Vice Chairman Kiger, seconded by Commissioner Honeycutt and unanimously carried, the Board authorized the County Manager to execute the Memorandum of Understanding with Charter Communications, subject to review and approval from the County Attorney.

(H) REPORTS

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

Commissioner Honeycutt announced the Senior Game Follies will be held April 26th at 6 p.m. at the Laurette Center in Kannapolis.

Commissioner Strang announced the Town of Midland has scheduled the ribbon-cutting ceremony for the Veterans Memorial at Rob Wallace Park on May 30th at 10 a.m.

Vice Chairman Kiger announced Active Living and Parks will hold the Roly Poly Festival on May 28th from 10 – 2 at Rob Wallace Park. Frank Liske Park is celebrating its 40th anniversary on June 4th, the June Bug 5K is June 4th at 9 a.m. at Frank Liske Park. Paddle Boats and Mini Golf at Frank Liske Park are now open on weekends at 11 a.m. Discovery Day Camp begins June 20th for nine weeks.

Vice Chairman Kiger also announced, from the Town of Harrisburg, the Run the Burg 5K sponsored by the YMCA is Saturday, April 30th. July 4th parade applications are now open.

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

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

- Adult Care Home Community Advisory Committee – 9 Vacant Positions
- Concord Planning and Zoning Commission (ETJ) – 1 Vacant Position
- Harrisburg Fire Advisory Board (ETJ) – 1 Vacant Position
- Home and Community Care Block Grant Committee – 1 Vacant Position
- Industrial Facilities and Pollution Control Financing Authority – 1 Vacant Position
- Juvenile Crime Prevention Council – 2 Vacant Positions
- Mental Health Advisory Board – 1 Vacant Position
- Nursing Home Community Advisory Committee – 9 Vacant Positions
- Planning and Zoning Commission – 1 Vacant Position
- Region F Aging Advisory Committee – 1 Vacant Position
- Transportation Advisory Board – 6 Vacant Positions
- Youth Commission – 11 Vacant Positions

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

(H-3) Budget – Monthly Budget Amendment Report

DRAFT

The Board received the monthly budget amendment report for informational purposes. No action was required of the Board.

(H-4) Budget – Monthly Financial Update

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

(H-5) County Manager – Monthly Building Activity Reports

The Board received the Cabarrus County Construction Standards Dodge Report for March 2022 and the Cabarrus County Commercial Building Plan Review Summary for March 2022 for informational purposes. No action was required of the Board.

(H-6) 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-7) Economic Development Corporation – March 2022 Monthly Summary Report

The Board received the Cabarrus Economic Development Corporation (EDC) monthly report for the month of March 2022 for informational purposes. No action was required of the Board.

(I) GENERAL COMMENTS BY BOARD MEMBERS

Vice Chairman Kiger commented on informal public comments that cross the line.

Chairman Morris commented on inappropriate informal public comments that have been presented at several meetings. He asked for input from the County Attorney.

Richard Koch, County Attorney, offered suggestions for the informal comment section for future meetings. Mr. Koch advised tonight's comments are regarding a court matter involving a juvenile, the records are sealed, and County staff are not allowed by law, to discuss the matter. Mr. Koch also advised he and the Deputy County Attorney did look into the matter.

County Manager Downs stated there was a state review of the matter in addition to the local review.

Commissioner Strang commented that before the meeting, the individuals referred to in the aforementioned comments were demanding personal information from citizens in the audience.

Commissioner Shue commented on the inappropriate comments given earlier tonight. He advised this type of behavior should not be tolerated.

Chairman Morris asked for direction from the Board for a statement to be read at the beginning of the informal comment period to advise citizens what is appropriate.

There was consensus from the Board for staff to prepare a statement for the Boards' approval to be read at the beginning of informal comments.

(J) WATER AND SEWER DISTRICT OF CABARRUS COUNTY

None.

(K) CLOSED SESSION

(K-1) Closed Session - Pending Litigation and Acquisition of Real Property

UPON MOTION of Commissioner Honeycutt, seconded by Vice Chairman Kiger and unanimously carried, the Board moved to go into closed session to discuss matters related to pending litigation and acquisition of real property as authorized by NCGS 143-318.11(a)(3) and (5).

UPON MOTION of Commissioner Honeycutt seconded by Commissioner Shue and unanimously carried, the Board moved to come out of closed session.

(L) ADJOURN

DRAFT

UPON MOTION of Vice Chairman Kiger, seconded by Commissioner Strang and unanimously carried, the meeting adjourned at 7:47 p.m.

_____
Lauren Linker, Clerk to the Board

DRAFT

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

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:

ATTACHMENTS:

- Changes to the Agenda

CABARRUS COUNTY BOARD OF COMMISSIONERS
CHANGES TO THE AGENDA
JUNE 20, 2022

ADDITIONS:

New Business

G-2 Finance - Budget Amendment for Debt Refunding of Limited Obligations Bonds - 2022A

G-3 Infrastructure and Asset Management - Purchase of Courtroom Pews

Closed Session

K-1 Closed Session - Pending Litigation, Economic Development and Acquisition of Real Property

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Recognitions and Presentations

SUBJECT:
Active Living and Parks - July Park and Recreation Month Proclamation

BRIEF SUMMARY:
The U.S. House of Representatives designated July as Parks and Recreation month. This has been celebrated since 1985. This year's theme is "We Rise Up" bringing attention to how important it is to rise up and support the profession. Every day, park and recreation professionals rise up for their communities in service of equity, climate-readiness, and overall health and well-being.

REQUESTED ACTION:
Motion to adopt the proclamation.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Londa Strong, Director
Perry Gabriel, Sr. Park Program Manager

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:
This item was approved by the Board for inclusion on the Agenda.

ATTACHMENTS:

- Proclamation

PROCLAMATION
July 2022 Park and Recreation Month
"We Rise Up"

WHEREAS, parks, recreation, and senior centers are an integral part of communities throughout this country, including Cabarrus County; and

WHEREAS, parks, recreation, and senior centers promotes health and wellness, and improving the physical and mental health of people who utilize and live near parks and senior centers; and

WHEREAS, parks, recreation, and senior centers promotes time spent in nature, which positively impacts mental health by increasing cognitive performance and well-being, and alleviating illnesses such as depression and attention deficit disorder; and

WHEREAS, parks, recreation and senior centers encourages physical activities by providing space for popular sports, hiking trails, swimming pools, and many other activities designed to promote active lifestyles; and

WHEREAS, parks, recreation, and senior centers provide programming and educational activities such as sports, camps, and environmental education which are critical to childhood development; and

WHEREAS, parks, recreation, and senior centers increase the County's economic prosperity through increased property values, increased tourism, attraction and retention of businesses, and crime reduction; and

WHEREAS, parks, recreation, and senior centers are fundamental to the environmental well-being of the County; and

WHEREAS, parks, recreation, and senior centers are essential and adaptable infrastructure that makes our County resilient in the face of natural disasters and pandemics; and

WHEREAS, parks, recreation, senior centers, and natural recreation areas ensure the ecological beauty of our County and provide a place for our children and adults to connect with nature and recreate outdoors; and

WHEREAS, the U.S. House of Representatives has designated July as Parks and Recreation Month; and

WHEREAS, local parks in North Carolina generated over $6 billion dollars in economic activity and provided over 37,000 jobs ranking North Carolina as 10th in the nation; and

WHEREAS, Cabarrus County recognizes the benefits derived from parks, recreation, and senior centers.

NOW THEREFORE, BE IT RESOLVED, that the Cabarrus County Board of Commissioners do hereby proclaim July 2022 as Park and Recreation Month in Cabarrus County.

Adopted this 20th day of June 2022.

_____

Stephen M. Morris, Chairman
Cabarrus County Board of Commissioners

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Recognitions and Presentations

SUBJECT:
Human Resources - Recognition of Senior Parks Program Manager Perry Gabriel on His Retirement from Cabarrus County Government

BRIEF SUMMARY:
After 33 years of service to Cabarrus County and its citizens, Perry Gabriel will retire on June 29, 2022 from his position as Senior Parks Program Manager.

REQUESTED ACTION:
Recognize Perry Gabriel and express appreciation for his many years of dedicated service to the citizens of Cabarrus County.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Lundee Covington, Human Resources Director
Londa Strong, Active Living and Parks Director

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:
This item was approved by the Board for inclusion on the Agenda.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Active Living and Parks - Cox Mill Easement Request from Concord Parks and Recreation

BRIEF SUMMARY:
The future Jim Ramseur Park is to be developed at 1252 Cox Mill Road in Concord, which is a 28.6-acre site directly adjacent to Cox Mill Elementary School. It was purchased by the City in 2020 to serve as the site of Concord's first Community Park in the Northwest. Parks and Recreation is working with the firm Woolpert located out of South Charlotte on design of the park.

With the majority of the park boundary being adjacent to Cox Mill Elementary School, and the existing fields at the back of the site currently operated by the Odell Athletic association, the first of these easement requests consists of an area of approximately 5.42 acres adjacent to and include the existing driveway for access to the park site, and improvements "resurfacing" of the driveway. This request is for a permanent access, maintenance and greenway easement.

Secondly, the City requests a sanitary sewer easement in order to connect to the existing sewer lift station on the school property, and to improve the station to accommodate sewer for the future park. This existing station is located behind the existing basketball courts next to the school playground.

Thirdly, the City is requesting a sidewalk easement along Cox Mill Road in order to install a public sidewalk in the future to assist with connectivity.

The three easement requests adjacent to Cox Mill Elementary School are as follows:

1. Permanent Access and Greenway Easement - 5.315 acres

2. Permanent Public Sanitary Sewer Easement - 0.164 acres
3. Permanent sidewalk easement - 0.381 acres

The Park project has entered Design Development, and Construction Documents phase, and is expected to be ready for construction by the Spring/Summer of 2023 contingent upon funding.

This was presented at the May Cabarrus County School Board Meeting and was approved.

REQUESTED ACTION:
Motion to approve the request by the City of Concord Parks and Recreation Department for easements required from Cabarrus County to assist in the development, maintenance, utility access and connectivity for the planned J.E. “Jim” Ramseur Park.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Londa Strong, Active Living and Parks Director
Jason Pauling, Concord Parks and Recreation Planner
Sheila Lowry, Concord Parks and Recreation Department Assistant Director

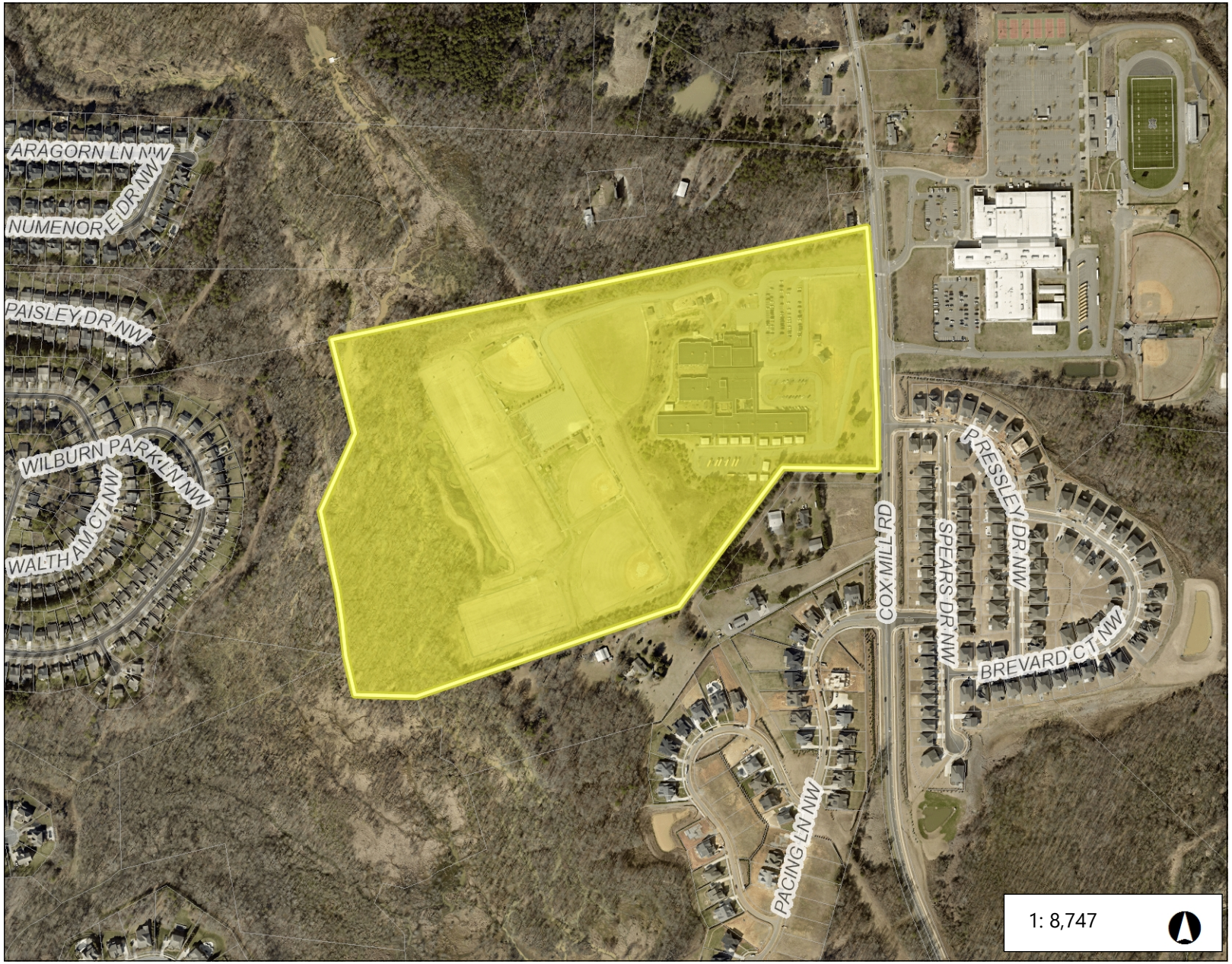
BUDGET AMENDMENT REQUIRED:
No

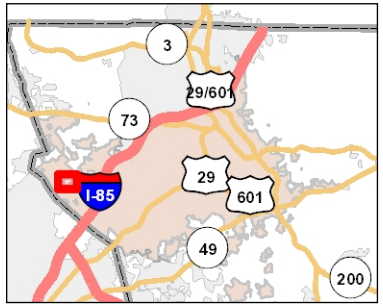
COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:
This item was approved by the Board for inclusion on the Agenda as a Consent item.

ATTACHMENTS:

- Cox Mill Easement
- NW Park

CABARRUS COUNTY - COX MILL ELEMENTARY SCHOOL





Legend

- Address Point
- Parcels
- Speedways & Race Tracks
- Airports & Airstrips
- Railroad
- Highways
  - Interstate
  - NC Highway
  - US Highway
- Roads
- Parks
- Cabarrus County

Notes

PID# 4680-32-1476

65.08 Acres

1,457.9 0 728.94 1,457.9 Feet

WGS_1984_Web_Mercator_Auxiliary_Sphere

© Latitude Geographics Group Ltd.

This map is a user generated static output from an Internet mapping site and is for reference only. Data layers that appear on this map may or may not be accurate, current, or otherwise reliable.

THIS MAP IS NOT TO BE USED FOR NAVIGATION

Concord
NORTH CAROLINA
PARKS & RECREATION

J.E. “Jim” Ramseur Park

Master Plan

April 22, 2022

Cabarrus County
Soil and Water
Conservation

Driveway / connection
to future developments
(Phase 2)

Cox Mill Road

Intersections to be evaluated by TIA for
phases 1 and 2 with City Transportation-
and NCDOT

Potential vehicular /
connection to school

Bridge Connection to
Clarke Creek Greenway

Proposed Access,
Maintenance &
Greenway Easement

Proposed Sanitary
Sewer Easement

Proposed
Sidewalk
Easement

Odell Sports Fields

Cox Mill
Elementary
School

Key

1. Future Recreation Center & Outdoor Education (Phase 2)
2. (6) Pickle Ball Courts & (2) Shade Structures
3. Open Lawn/Event Space
4. Parking (+/- 256 Spaces)
5. Splash Pad
6. Adventure / Obstacle Playground
7. Restrooms & Pavilion
8. (2) Basketball Courts w/Restroom/Shelter
9. Maintenance Area
10. Greenway Trail / Boardwalks
11. Pedestrian Bridge / Boardwalk
12. Small & Large Dog Park

- Proposed Pavilion
- Asphalt Pavement
- Concrete Walks
- Boardwalk / Bridge
- Play Area
- 10’ Multi-Use Trail
- Natural Surface Trail
- 100 Year Flood Elevation
- Wetland
- Property Lines

WOOLPERT
ARCHITECTURE | ENGINEERING | GEOSPATIAL

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Active Living and Parks - Matching Incentive Grant Update Proposal

BRIEF SUMMARY:
The proposed changes to the current Incentive Grant Guidelines are below. The highlighted areas include the proposed changes (strikethrough)/additions (red lettering):
Under Eligibility:

B. Provide a new recreational or park facility on eligible property or renovate an existing recreational or park facility. ~~NOTE: Elementary School Park facilities are the only school parks eligible for renovations.~~

E. The project must remain open to the public, intact, maintained, and used for its intended purpose for fifteen years, unless the sponsoring organization reimburses the county for any grant funds provided or upon mutual agreement from the county.

Under Matching Incentive Grant Program:

I. The sponsoring organization will be responsible for any expenses not reflected in the grant application once the application is approved.

For Further Information Contact:
~~Byron A. Haigler, Park Program Manager~~
~~704-920-3360~~
~~Email: BAHaigler@cabarruscounty.us~~
~~Cabarrus County Active Living & Parks~~

Ian Sweeney, Project & Events Manager
Phone: 704-920-3488
Email: IJSweeney@cabarruscounty.us
Cabarrus County Active Living and Parks

Revised 6/20/22

REQUESTED ACTION:
Motion to approve the proposed updates to the current Matching Incentive Grant Guidelines.

EXPECTED LENGTH OF PRESENTATION:

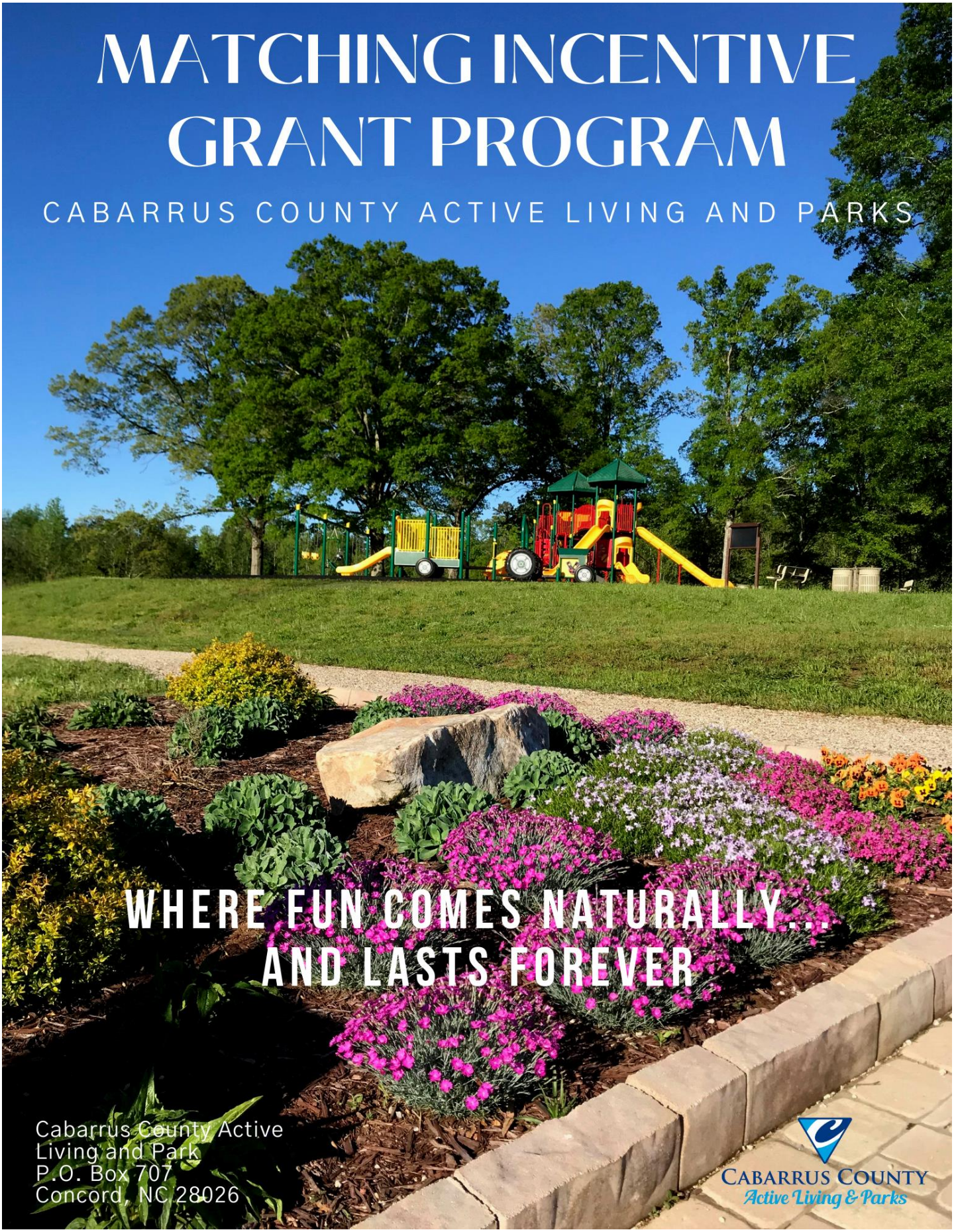
SUBMITTED BY:
Byron Haigler, Assistant Active Living and Parks Director

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.

ATTACHMENTS:

- Matching Incentive Grant Proposed Guidelines


MATCHING INCENTIVE GRANT PROGRAM
CABARRUS COUNTY ACTIVE LIVING AND PARKS
WHERE FUN COMES NATURALLY...
AND LASTS FOREVER
Cabarrus County Active Living and Park
P.O. Box 707
Concord, NC 28026
CABARRUS COUNTY
Active Living & Parks

P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT GUIDELINES

FUNDING AVAILABLE: Up to 50% of project cost. Actual amount of funds available for the grants will be determined with the approval of the FY Budget.

PURPOSE: To provide seed money for civic and community groups to construct, improve or acquire recreational and park facilities in Cabarrus County.

SPONSORSHIP: A project must be sponsored by non-profit civic or community group. The sponsoring organization must have elected officers, by-laws, and bank accounts. Examples of groups which can apply for funds are: PTO's, civic clubs, youth sports organizations, church organizations, garden clubs, athletic or recreation associations. The Active Living & Parks Department will determine which organizations meet the qualifications. Donations from corporations, grants, or individuals may be used to match county funds to construct or improve recreation facilities on publicly owned land in Cabarrus County. In-kind contributions are not eligible as a match.

ELIGIBILITY: To be eligible, a project must meet the following criteria:

A. The project must be located on public property owned by Cabarrus County, the boards of education, a municipality within the county, or property leased to the county for a minimum of fifteen years. Projects on school property must be consistent with the respective school system's long-range plans. Projects on park property must be consistent with the Parks Department's long-range plans.

B. Provide a new recreational or park facility on eligible property or renovate an existing recreational or park facility. ~~NOTE: Elementary School Park facilities are the only school parks eligible for renovations.~~

C. The project must be open to the public on a non-discriminatory basis upon completion, subject to

such reasonable restrictions as may be agreed upon by the parties and stipulated as such in the application.

D. The property the project is located on must remain unlocked and open to the public. (Gates may be locked at a reasonable hour agreed on by the Cabarrus County Active Living & Parks Department.)

E. The project must remain open to the public, intact, maintained, and used for its intended purpose for fifteen years, unless the sponsoring organization reimburses the county for any grant funds provided or upon mutual agreement from the county.

GENERAL INFORMATION:

A. Grant Priority Rating

Level 1 – Highest Priority

New recreation facilities/ opportunities or renovation of existing recreation facilities/ opportunities Examples include, but are not limited to: Athletic sports fields, athletic courts, playgrounds, hiking and jogging trails, physical fitness courses, improvements to existing facilities

Level 2 – Moderate Priority

New support facilities for recreation opportunities or renovation of existing recreation support facilities

Examples include, but are not limited to: Outdoor lighting, landscaping projects, picnic shelters & facilities, irrigation systems, restroom & concession facilities

Level 3 – Lowest Priority

Acquiring property for recreation facilities/ opportunities

B. Expendable maintenance equipment is eligible with certain restrictions. Examples include, but are not limited to Tractors, ATVs, UTVs, Mowers, etc. Expendable equipment must remain on the school/recreation property at all times. Applicants must provide documentation of the equipment's storage and scheduled maintenance plan. Ineligible supplies include, but are not limited to concession equipment, PA systems, bats, balls, uniforms, etc.

C. Project funds spent prior to application cannot be included toward an organization's match of county funds (exceptions: funds spent on planning, architectural, engineering, permitting and/or related services provided that all of Cabarrus County's public bidding requirements have been met).

D. Funds from governmental agencies cannot be used to match Incentive Grant funds.

E. Sponsoring organizations must have a minimum of 50% of the total project cost available at the time of application.

F. The sponsoring organization's match must be cash.

G. Provisions must be made for continuing maintenance and repair of the project once it is completed.

H. Maintenance Agreement Form (or letter of responsibility) must be signed by School Principal/Mayor/Manager, Project Coordinator, and Director of Facilities, Operation and Construction/Director of Business Operations.

LAND ACQUISITION PROJECTS

A. A "Notice of Limitation of Use" assurance must be part of the application and if approved for a Cabarrus County Matching Incentive Grant, the assurance must be made part of the project site's public property records. The "Limitation of Use" assures that the property described in the application and the dated project boundary map has been acquired and/or developed with Matching Incentive Grant monies and will in **perpetuity be used for public outdoor recreation purposes.**

Sample NOTICE OF LIMITATION OF USE Assurance Form

The (Applicant's Name) understands that **IF** the property identified on the project boundary map of this application is acquired and/or developed with financial assistance provided by Cabarrus County Active Living & Parks Department in accordance with the Matching Incentive Grant program, **THEN**, this property may not be converted to other than public outdoor recreation uses (whether by transfer, sale, or in any other

manner) without the express written approval of the Cabarrus County Active Living & Parks Department.

B. The Matching Incentive Grant applicant must pay **all** costs associated with the purchase of property (attorney fees, title search, survey, recording fees, etc.).

C. If the property is not in the name of Cabarrus County, a municipality, and/or school, the property must be leased to one of the government agencies for a minimum of fifteen years

APPLICATION AND AWARD PROCEDURES:

A. Completed applications must be submitted to the Department between the **first Monday in May through the second Friday in June.** Incomplete applications will not be considered.

B. Eligible applicants must be present at the **June (the third Thursday)** Active Living & Parks Commission Meeting to present their projects to the Commission. Each applicant will be allotted 5 minutes for presentation purposes.

The Property Committee of the Active Living & Parks Commission and the department staff will review all applications and make recommendations to the full Commission for funding.

If additional grant funds are still available after the initial grants are approved and awarded, a seconded cycle of applications will be accepted. Applications will be accepted from the **first Tuesday following Labor Day until the second Friday in October** for the second cycle. The same procedures will apply to both cycles of applications.

C. The Active Living & Parks Commission will prioritize the Incentive Grant projects that will be recommended for approval to the Board of County Commissioners. All projects, including those not recommended for funding (if any), will be presented to the Board of County Commissioners for their consideration as well.

D. Upon approval of the projects by the Board of Commissioners, the Active Living & Parks Department will provide written confirmation of the grant to the sponsor, indicating the amount of the award, instructions, conditions, etc.

MATCHING INCENTIVE GRANT PROGRAM:

A. Project must begin within sixty (60) days of notification of project approval and be completed by June 30th of the following fiscal year.

B. Municipalities and boards of education may administer projects on municipal or school owned property. If the government entity administers the project with all monies paid to them, they must provide a summary of the expenditures at the conclusion of the project.

C. In order to assure standards of quality, all improvements will be made under the supervision of the Active Living &Parks Department.

D. Project plans and specifications must be approved by the Cabarrus County Active Living & Parks Department, School Principal, and the Director of Facilities, Operation and Construction/Director of Business

E. Operations. Projects shall not deviate from the approved plans and program descriptions without prior approval of the Cabarrus County Active Living & Parks Department. Failure to comply will result in revocation of the grant award.

F. Project plans and specifications must be submitted for a review period of at least 5 working days to the Director of Facilities, Operation and Construction of Cabarrus County Schools and/or the Director of Business Operations of Kannapolis City Schools.

G. Any organization responsible for the operations and maintenance of a project completed on property not owned by the county must assume all general liability for the completed structure. The agency supervising the project construction will be liable for the project during the

construction period. This includes all utilities (water, sewage, etc.), maintenance, upkeep and supervision of the facility. Builders' risk insurance is required from all contractors.

H. The sponsoring organization must submit its matching funds directly to Cabarrus County Active Living & Parks Department. Cabarrus County will be responsible for the expenditures of all funds unless other arrangements have been made and approved by the County Manager.

I. The sponsoring organization will be responsible for any expenses not reflected in the grant application once the application is approved.

J. Expenditures made by the county are subject to Cabarrus County and State of North Carolina purchasing procedures.

K. If the project is at a school, the Principal and the Director of Facilities, Operations and Construction/Director of Business Operations must approve the grant request. If on municipal or county property, the respective city or county official must approve the grant request.

I. Failure to comply with any of these requirements may result in revocation of funds.

J. All public utilities must be in the name of the sponsoring organization.

For Further Information Contact:

~~Byron A. Haigler, Park Program Manager~~
~~704-920-3360~~
~~Email: BAHaigler@cabarruscounty.us~~
~~Cabarrus County Active Living & Parks~~

Ian Sweeney, Project & Events Manager
Phone: 704-920-3488
Email: IJSweeney@cabarruscounty.us
Cabarrus County Active Living and Parks

Post Office Box 707 Concord, NC 28026-0707
Fax: 704-920-3494

Revised June 30, 1989	Updated 6/30/06
Revised June 14, 1991	Updated 01/18/07
Revised June 23, 1992	Updated 01/28/08
Revised June 27, 1994	Updated 01/05/09
Revised April 27, 1995	Updated 10/15/09
Revised May 23, 1996	Updated 03/18/11
Revised June 23, 1997	Updated 04/17/12
Revised June 10, 1998	Updated 04/01/13
Updated June 7, 1999	Updated 04/04/14
Updated June 14, 2000	Updated 02/19/15
Updated June 19, 2001	Revised 10/15/15
Updated June 11, 2002	Revised 6/20/22
Updated June 18, 2003	
Revised March 1, 2004	
Updated June 15, 2005	

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT CHECKLIST

Applicant_____

Project Name_____

In order for Matching Incentive Grant Application to be complete, all items listed must be included. If item is not applicable to project, please indicate NA.

_____ 1. Matching Incentive Grant Checklist

_____ 2. Incentive Grant Applicant Information Form

_____ 3. Project Narrative

_____ 4. Minutes of Group Presentation(s)

_____ 5. Budget Information
   a. Budget Information Form
   b. 3 Itemized Estimates/Quotes from Contractors/Vendors for any purchases over $1,000.00

_____ 6. Maintenance Agreement

_____ 7. Design Drawings/Site Plan Form
   a. Designs
   b. Site Plan

_____ 8. Land Acquisition Form (if applicable)

_____ 9. Current Bank Statement

Dates to Remember:

Second Friday in June – Grant Application Deadline

Third Friday in June – Grant Application Presentations
Cabarrus County Active Living & Parks Commission

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT SIGNATURE PAGE

By signing our names below, we attest to having seen and read the following pages. We also acknowledge that we agree with and support the scope of the project.

Attachment A	Matching Incentive Grant Applicant Information Form
Attachment B	Matching Incentive Grant Project Narrative
Attachment C	Matching Incentive Grant Budget Information Form & Itemized Estimates/ Quotes
Attachment D	Matching Incentive Grant Maintenance Agreement Form
Attachment E	Matching Incentive Grant Design/ Site Plan Form
Attachment F	Matching Incentive Grant Land Acquisition Form

_____ _____

Director of Facilities, Operations & Construction/Director of Business Operations (if applicable) ***Date***

_____ _____

School Principal/Mayor/Manager ***Date***

_____ _____

Project Coordinator ***Date***

Attachment A

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT APPLICANT INFORMATION FORM

1. APPLICANT INFORMATION			
ORGANIZATION NAME		NON-PROFIT _____YES _____NO	
ADDRESS	PHONE NUMBER	FAX NUMBER	OTHER NUMBER
PROJECT COORDINATOR'S NAME			
EMAIL ADDRESS			
ADDRESS	PHONE NUMBER	FAX NUMBER	OTHER NUMBER
SCHOOL PRINCIPAL'S NAME (IF PROJECT LOCATED ON SCHOOL PROPERTY)			
EMAIL ADDRESS			
ADDRESS	PHONE NUMBER	FAX NUMBER	OTHER NUMBER
2. PROJECT INFORMATION			
DESCRIPTIVE TITLE OF PROJECT			
PROJECT SITE			
STREET ADDRESS	CITY	STATE	ZIPCODE
AREAS AFFECTED BY PROJECT: (SCHOOLS, MUNICIPALITIES, ETC.)		_____ NEW PROJECT _____ON-GOING PROJECT	START DATE _____ COMPLETION DATE _____
WILL A FEE BE CHARGED FOR USE OF FACILITY/PROJECT? _____YES _____NO	ON-GOING MAINTENANCE FOR PROJECT WILL BE PROVIDED BY:		
ESTIMATED FUNDING: APPLICANT $ COUNTY $ IN-KIND $ TOTAL $	TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL DATA IN THIS APPLICATION IS TRUE AND CORRECT. THE DOCUMENT HAS BEEN AUTHORIZED BY THE GOVERNING BODY OF THE APPLICANT AND THE APPLICANT WILL COMPLY WITH THE ATTACHED ASSURANCES IF THE GRANT IS AWARDED. TYPED NAME OF PROJECT COORDINATOR SIGNATURE OF PROJECT COORDINATOR _____		

Attachment B

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT PROJECT NARRATIVE

The PROJECT NARRATIVE gives the applicant an opportunity to describe and justify the need for the project being proposed, describe the levels of public involvement, citizens served, and planning and operation/maintenance for the proposed project. Please provide concise but detailed explanations for each section, using the section headings listed below. Include the information from the Scoring Sheet in narrative.

Title it: **PROJECT NARRATIVE FOR (PROJECT NAME)**

1. Project Description

Describe the project by listing the new, additional and/or renovated recreation facilities and support facilities that will be provided if the grant is awarded.

- Will this project provide the first recreation facility built with grant funding?
- Why is the project needed?
- What is the project designed to accomplish?
- Who will the project serve (clientele and area)?
- If the project includes renovation, justify the renovation, such as the age of the facility or overuse.
- If applicable, explain the need for land acquisition.

2. Project Planning

Describe all planning efforts and methods used to identify the need for this project.

- How were priorities established?
- Does this project correspond to the Livable Community Blueprint?

3. Public Involvement

Describe how community citizens have been involved in developing plans for the proposed project and the level of public support for the project. Consider public meetings for discussing the project, presentations to civic/community groups. Attach a copy of minutes or support documentation.

4. Operation and Maintenance

Describe who will be responsible for the development, operation, programming and maintenance of the site upon completion. Attach the Maintenance Agreement Form.

5. Citizens Served

To what extent will persons with disabilities be served by the proposed project? Is the project designed to meet or exceed the Americans with Disabilities Act Accessibility Guidelines?

Applicant_____

PROJECT NARRATIVE FOR _____

(Name & Location of Project) (Attach additional sheet if necessary)

1. Project Description

2. Project Planning

3. Public Involvement

4. Operation and Maintenance

5. Citizens Served

Attachment C

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT BUDGET INFORMATION FORM

Applicant_____

Project Name_____

BUDGETED ITEM	AMOUNT
Architectural/Engineering Fees	$
Materials	$
Construction	$
Permits/Inspections	$
Land Acquisition	$
Demolition/Removal	$
Other	$
	$
	$
	$
TOTAL	$

NOTE: Three itemized estimates/quotes from contractors/vendors should be attached.

Attachment D

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT MAINTENANCE AGREEMENT FORM

Applicant_____

Project Name_____

It is understood that _____
(Organization)

is submitting a Matching Incentive Grant Application to Cabarrus County Active Living & Parks Department

for _____
(Project)

at_____.
(Facility)

(Type of Maintenance) _____

_____

_____

_____

will be performed by _____
(Organization/Company)

on a regular schedule consisting of _____

_____

_____.

_____ _____
Director of Facilities, Operation & Construction/Director of Business Operations (if applicable) ***Date***

_____ _____
School Principal/Mayor/Manager ***Date***

_____ _____
Project Coordinator ***Date***

Note: Any equipment purchased with Cabarrus County funding will remain with the County if the association disbands.

Attachment E

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT DESIGN/SITE PLAN FORM

Applicant_____

Project Name_____

The attached Design/Drawings for the _____
(Project)

at _____
(Facility)

are being submitted as a Cabarrus County Active Living & Parks Department Matching Incentive Grant Application and meet the approval of_____.
(Property Owner)

_____ _____
Director of Facilities, Operation & Construction/Director of Business Operations (if applicable) ***Date***

_____ _____
School Principal/Mayor/Manager ***Date***

_____ _____
Project Coordinator ***Date***

Attachment F

Cabarrus County Active Living & Parks Department
P.O. Box 707, Concord, NC 28026-0707

MATCHING INCENTIVE GRANT LAND ACQUISITION FORM

This Landowner Agreement is entered into effective the_____day of_____, 20___by _____(*either an individual residing at____,_____North Carolina_____or _____, a North Carolina corporation/limited liability company/partnership, with its principal place of business at _____,_____North Carolina_____) (hereafter, the "**Landowner**"); Cabarrus County, North Carolina, with its principal place of business at 65 Church Street, Concord, North Carolina 28025 (the "**County**"); and _____, a North Carolina non-profit corporation with its principal place of business at__, _____North Carolina _(" **Applicant**").

WHEREAS, Landowner is the sole and exclusive owner in fee simple of the real estate and all improvements thereon located at_____,_____, North Carolina _____totaling approximately_____acres and more particularly described in **Exhibit A** attached hereto and incorporated herein (hereafter, the "Property") (*need to attach a legal metes and bounds description of the real property as **Exhibit A**); and

WHEREAS, **Applicant** and **Landowner** jointly and severally represent to the **County** that **Applicant** and **Landowner** have entered into a conditional purchase agreement for **Applicant's** purchase of the Property, conditioned upon, among other things, **Landowner's** agreement to sell the Property for an aggregate purchase price of $_____and **Applicant's** approval for receipt of funds in the aggregate amount of $_____(the "Funds") pursuant to the **County** Matching Grants Incentive Program for the County's fiscal year 20____-20_____, offered by the **County** through the County Active Living & Parks Department (the "**Department**"), (hereafter, the above referenced Matching Grants Incentive Program may be referred to as the "Program"); and

WHEREAS, Applicant hereby represents to **Landowner** that **Applicant** has applied for or will timely apply for receipt of the Funds pursuant to the Program in order to purchase the Property; and

WHEREAS, Landowner hereby represents to the **Applicant** and the **County** that it is aware of and agrees to the restrictive uses for the Property that will be imposed by the **County** on the **Applicant's** use of the Property in order for **Applicant** to be considered for award of the Funds; and

WHEREAS, Landowner understands that the **Department** must evaluate all applications for Program funds, which are awarded on a limited basis, and that **Applicant** may or may not be granted the Funds pursuant to the Program.

NOW THEREFORE, in consideration of the premises and other good and valuable consideration, the sufficiency of which is hereby acknowledged, the parties agree as follows:

1. **Guarantee of Purchase Price to Applicant/Title to Property. Landowner** and **Applicant** represent and warrant to the **County** that they have agreed, respectively, to the sell and purchase the Property for an aggregate purchase price of $____(the "Purchase Price") upon the terms and conditions more fully set forth in the purchase agreement by and between the **Landowner** and the **Applicant**, which is attached hereto as **Exhibit B** and incorporated as if more fully set forth herein. Such terms and conditions include, without limitation, a provision that **Landowner** is the sole and exclusive owner of the Property and has the sole and exclusive unencumbered right to transfer fee simple title to the **Applicant** by North Carolina General Warranty Deed, free and clear of all encumbrances whatsoever except for ad valorem property taxes not yet due and payable.

2. **Right to Purchase. Landowner** represents and warrants to the **County** and **Applicant** that the Purchase Price and **Applicant's** right to purchase the Property shall remain in effect until the **Department** releases the names of the recipients of the Program funds. The **Department** warrants and represents that it will use its best efforts to announce the recipients of the Program funds no later than_____, 20__.

3. **Environmental Warranties and Representations.** In addition to any other representations and warranties provided the **Applicant** by the **Landowner** with respect to the Property, **Landowner** represents and warrants to the **County** and the **Applicant** that the Property is not currently and to the best knowledge of the **Landowner** after due investigation, has never been in violation of any federal, state or local laws, rules, regulations, or ordinances pertaining to environmental matters of any kind or nature and to the best of **Landowner's** knowledge, no adjoining property is or has ever been in violation of any federal, state or local laws, rules, regulations or ordinances pertaining to environmental matters of any kind or nature.

4. **Obligation to Purchase.** Notwithstanding any term or condition of this or any other agreement regarding the Property, no term or condition of this Agreement or any other agreement shall be construed to require **Applicant** to purchase the Property in the event: (1) **Landowner** is in default under this or any other agreement by and between **Applicant** and **Landowner** with regard to the Property; or (2) **Applicant** is not the recipient of the full amount of the Funds under the Program. Furthermore, no term or condition of this or any other agreement shall be construed to impose a duty, express or implied, upon the **County** or the **Department** to award the Funds or any portion thereof to the **Applicant**.

5. **Landowner** understands that in the event the **Landowner** is in default under the terms and conditions of **Exhibit B**, if any **Landowner** representations and warranties set forth herein are false or misleading, or in the event **Applicant** is not the recipient of the full amount of the Funds, neither **Applicant** nor the **County** is under any express or implied obligation whatsoever to purchase the Property.

6. **Miscellaneous.** This agreement shall be governed by the laws of the state of North Carolina. For purposes of enforcement of this Agreement, the parties agree to the exclusive jurisdiction of the courts of Cabarrus County, North Carolina without application of any conflicts of laws provisions of any jurisdiction. Paragraph headings are for convenience only and shall not be deemed to be a controlling part of this Agreement. In the event any provision of this Agreement is deemed for any reason to be unenforceable, the remaining provisions shall remain in full force and effect. No party hereto may assign this Agreement without the express prior written consent of the other parties hereto. However, this Agreement shall be deemed binding upon any successor in interest to the **Landowner** and any other permitted successors and/or assigns of the parties. No provision of this or any other agreement shall be construed to imply a joint venture, partnership or agency agreement between or among the parties hereto.

LANDOWNER: **APPLICANT:**

_____ _____

By :_____(Seal) By :_____(Seal)

Name:_____ Name: _____

Title:_____ Title: _____

READ AND AGREED TO:

CABARRUS COUNTY, NORTH CAROLIINA

By: _____

Name: _____

Title: Director, Active Living & Parks Department of Cabarrus County

This instrument has been audited in accordance with the Local Government Budget and Fiscal Control Act. By: _____, Pam DuBois, Finance Director, Cabarrus County, North Carolina

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Board of Equalization and Review

BRIEF SUMMARY:
Audy Dover and Bernard Felder currently serve as regular members and William Ferriss currently serves as an alternate member of the Cabarrus County Board of Equalization and Review. Each have terms expiring June 30, 2022. Each have expressed their desire to remain on the Board. Mr. Dover has served on the Board since his initial term in 2005, so an exception to the "length of service" provision of the appointment policy will be needed for his approval.

REQUESTED ACTION:
Motion to reappoint Audy Dover and Bernard Felder to the Cabarrus County Board of Equalization and Review as regular members for three-year terms ending June 30, 2025; including an exception to the length of service provision of the Appointment Policy for Mr. Dover.

Motion to reappoint William Ferriss to the Cabarrus County Board of Equalization and Review as an alternate member for a one-year term ending June 30, 2023.

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.

ATTACHMENTS:

- Memo to BOC
- Roster
- Applications on File

Cabarrus County Tax Administration
David Thrift – Tax Administrator

May 16, 2022

MEMORANDUM

To: Cabarrus County Board of Commissioners

From: David Thrift, Tax Administrator

Re: Appointments to the Cabarrus County Board of Equalization and Review

Mr. Audy Dover and Mr. Bernard Felder currently serve as members and Mr. William Ferriss currently serves as an alternate member of the Cabarrus County Board of Equalization and Review. Each have terms expiring June 30, 2022. Each have expressed their desire to remain on the Board. Mr. Dover has served on the Board since his initial term in 2005, so an exception to the "length of service" provision of the appointment policy will be needed for his approval.

Based on the quality of their prior service and their commitment to this Board I recommend Mr. Dover, Mr. Felder and Mr. Ferriss for reappointment at this time.

David Thrift
Tax Administrator

65 Church Street S. (28025)
P.O. Box 707 Concord, NC 28026-0707
Phone: 704.920.2166 • Fax: 704.920.2111
Website: www.cabarruscounty.us

BOARD OF EQUALIZATION AND REVIEW
5 Members - Appointed by County Commissioners
3-Year Terms

Bernard Felder	**APPOINTMENT:**	**03/20/2017**
9932 Clarkes View Place NW		**(unexpired term)**
Concord, NC 28027	**REAPPOINTMENT:**	**06/18/2018**
	APPOINTMENT:	**06/17/2019****
	TERM EXPIRING:	**06/30/2022**

Audy R. Dover (Vice Chair)	**APPOINTMENT:**	**01/24/2005**
557 Cabarrus Avenue		**(unexpired term)**
Concord, NC 28025	**REAPPOINTMENT:**	**07/14/2005**
	REAPPOINTMENT:	**06/16/2008**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/20/2011**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/17/2013**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/20/2016**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/17/2019**
	TERM EXPIRING:	**06/30/2022**

Helen McInnis	**APPOINTMENT:**	**07/21/2014**
5517 Hammermill Drive		**(unexpired term)**
Harrisburg, NC 28075	**REAPPOINTMENT:**	**06/15/2015**
	APPOINTMENT:	**03/20/2017**
		(unexpired term)
	REAPPOINTMENT:	**06/19/2017**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/15/2020**
	TERM EXPIRING:	**06/30/2023**

Glen Tucker	**APPOINTMENT:**	**06/20/2011**
4551 Windy Road	**REAPPOINTMENT:**	**06/18/2012**
Concord, NC 28027	**REAPPOINTMENT:**	**06/15/2015**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/18/2018**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/21/2021**
	TERM EXPIRING:	**06/30/2024**

Keith Troutman	**APPOINTMENT:**	**06/20/2011**
60 Burrage Road	**REAPPOINTMENT:**	**06/18/2012**
Concord, NC 28025	**REAPPOINTMENT:**	**07/21/2014***
(exception to appt. policy)	**REAPPOINTMENT:**	**06/19/2017**
(exception to appt. policy)	**REAPPOINTMENT:**	**06/15/2020**
	TERM EXPIRING:	**06/30/2023**

ALTERNATE

William Ferriss	**APPOINTMENT:**	**06/17/2019**
1417 12th Fairway Drive	**REAPPOINTMENT:**	**06/15/2020**
Concord, NC 28027	**REAPPOINTMENT:**	**06/21/2021**
	TERM EXPIRING:	**06/30/2022**

Note: At its June 20, 2011 meeting, the Board staggered terms for one, two and three year appointments for continuity.

Note: The Board of Equalization and Review meets as needed beginning on the 1st Monday in April or May at the Governmental Center at 3:00 p.m.

***Keith Troutman served as an "alternate" beginning June 29, 2011. He was appointed to a three-year term as a regular member on July 21, 2014.**

Note: Helen McInnis served as an "alternate" beginning July 21, 2014. She was appointed to an unexpired term as a regular member on March 20, 2017.

****** While Bernard Felder was serving as an alternate he was appointed as a regular member on June 17, 2019 to fill the position vacated by Mary Stewart.**

Board of Equalization and Review
Applications on File
May 17, 2022

Adam Carriker	11618 Getaway Lane	Charlotte, NC 28215
Audy Dover*^	557 Cabarrus Avenue	Concord, NC 28025
Bernard Felder*	9932 Clarkes View Place	Concord, NC 28027
William Ferris*	1417 12th Fairway Drive	Concord, NC 28027
Monica Long	3714 Ayrshire Court	Harrisburg, NC 28075
Leah Sikes	2405 Geneva Drive	Concord, NC 28025

*Current member.
^An exception to the length of service provision of the Appointment Policy will be needed.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Centralina Workforce Development Board

BRIEF SUMMARY:
The terms on the Centralina Workforce Development Board for members Tracie Hampton and Milton Chicas, Private Sector representatives, end June 30, 2022. Both are recommended to be appointed to serve another term. Ms. Hampton resides in Mecklenburg County and Mr. Chicas resides in Gaston County. An exception to the residency provision of the Appointment Policy will be needed for them.

REQUESTED ACTION:
Motion to reappoint Tracie Hampton and Milton Chicas as Private Sector representatives, to the Centralina Workforce Development Board for two-year terms ending June 30, 2024; including an exception to the residency provision of the Appointment Policy for Ms. Hampton and Mr. Chicas.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
David Hollars, Executive Director, Centralina Workforce Development Board
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.

ATTACHMENTS:

- Letter of Recommendation
- Roster
- Applications on File

CENTRALINA
Workforce Development
Board

9815 David Taylor Drive, Suite 100
Charlotte, North Carolina 28262
(704) 348-2717 Fax: (704) 899-5624
E-Mail: dhollars@centralina.org
www.centralinaworks.com

May 3, 2022

Mr. Mike Downs, Manager
Cabarrus County
PO Box 707 / 65 Church Street
Concord, NC 28026-0707

Dear Mr. Downs:

The purpose of this letter is to give you notice of appointments needed from the Cabarrus County Commissioners to the **Centralina Workforce Development Board (WDB**).

The information attached describes the appointments needed at this time.

We ask that Cabarrus County complete the necessary actions for reappointments as requested under the *"Specific Requests"* section as soon as possible but no later than July 1, 2022. ***Please inform me as soon as possible of your decision(s).***

If you have any questions, please contact me at (704) 348-2717 or by e-mail at dhollars@centralina.org. Thank you for your continued support.

Sincerely,

David L. Hollars, Executive Director
Centralina Workforce Development Board

Attachments

C: Steve Morris, Cabarrus County Commission Chair
Angela Poplin, Cabarrus County Clerk

CABARRUS COUNTY - CURRENT MEMBERSHIP

Cabarrus County has four (4) members on the twenty-four (24) member Centralina Workforce Development Board (WDB). The Cabarrus County Commissioners will select and approve nominations for WDB members based on the slate of nominations presented by the appropriate agencies and organizations listed under "General Information" and “Membership”. Each WDB member is appointed to serve a two-year term. Upon approval by the county commissioners, individuals may be reappointed.

NAME	REPRESENTING	TERM EXPIRES	ATTENDANCE (Last10 meetings)	
Tracie Hampton	Private Sector	06/30/2022	Present – 10	Proxies - 0
Milton Chicas	Private Sector	06/30/2022	Present – 6	Proxies – 4
Dr. Carol Spalding	Education	06/30/2023	Present – 8	Proxies - 2
Beatriz Rodriguez	Private Sector	06/30/2023	Present – 4	Proxies – 1

SPECIFIC REQUESTS

Please reappoint the following individuals or obtain nominations and appoint two (2) individuals to fill the terms of July 1, 2022 - June 30, 2024. Nominations and appointments to fill the categories of ***Private Sector/Business*** are requested.

Ms. Tracie Hampton (Westrock Coffee) is eligible for reappointment as one of the Private Sector representatives. Tracie is an excellent Board member and serves as chair of the Board’s Outreach/Communications Focus Team. Her expertise and experience are invaluable to the Board. Tracie Hampton has been contacted and has agreed to be reappointed for another 2-year term.

The Centralina WDB requests that Ms. Tracie Hampton be reappointed as a PRIVATE SECTOR representative for Cabarrus County

Mr. Milton Chicas (KAIM Consulting, LLC.) is eligible for reappointment as one of the Private Sector representatives. Milton is an excellent Board member and serves on the Board’s Outreach/Communications Focus Team. His expertise and experience in the Commercial Construction industry are invaluable to the Board. Milton Chicas has been contacted and has agreed to be reappointed for another 2-year term

The Centralina WDB requests that Mr. Milton Chicas be reappointed as a PRIVATE SECTOR representative for Cabarrus County

If an individual does not wish to be reappointed to the WDB or the County chooses not to reappoint, please obtain necessary nominations for appointments. Please supply David Hollars at the Centralina WDB a list of nominations and appointees (including name, title, company/agency, address, phone numbers, and e-mail) as soon as possible but no later than **July 1, 2022**.

CENTRALINA WORKFORCE DEVELOPMENT BOARD
(Formerly PRIVATE INDUSTRY COUNCIL)

CENTRALINA COUNCIL OF GOVERNMENTS

(2-year terms)

Dr. Carol Spalding **1012 Westlake Drive** **Kannapolis, NC 28081**	**(Education)**	**APPOINTMENT: 02/15/16*** **(UNEXPIRED TERM)** **REAPPOINTMENT: 06/19/17*** **REAPPOINTMENT: 06/17/19*** **REAPPOINTMEMT: 06/21/21*** **TERM EXPIRING: 06/30/23**
Beatriz Rodriguez **1509 Pine Creek Road** **Gastonia, NC 28056**	**(Private Sector)**	**APPOINTMENT: 04/19/21*** **(UNEXPIRED TERM)** **REAPPOINTMENT: 06/21/21*** **TERM EXPIRING: 06/30/23**
Tracie Hampton **8812 Deerland Court** **Huntersville, NC 28078**	**(Private Sector)**	**APPOINTMENT: 06/16/14*** **REAPPOINTMENT: 06/20/16*** **REAPPOINTMENT: 06/18/18*** **REAPPOINTMENT: 06/15/20*^** **TERM EXPIRING: 06/30/22**
Milton Chicas **2210 Wynbourne Drive** **Gastonia, NC 28056**	**(Private Sector)**	**APPOINTMENT: 06/21/10** **REAPPOINTMENT: 06/18/12*** **REAPPOINTMENT: 06/16/14*** **REAPPOINTMENT: 06/20/16*^** **REAPPOINTMENT: 06/18/18*^** **REAPPOINTMENT: 06/15/20*^** **TERM EXPIRING: 06/30/22**

*** Exception to the Appointment Policy "residency" provision.**
^ Exception to the Appointment Policy "length of service" provision.

Centralina Workforce Development Board

Applications on File
May 5, 2022

Shalini Byker		7779 Windsor Forest Place	Harrisburg, NC 28075
Milton Chicas*	Current member	2210 Wynbourne Drive	Gastonia, NC 28056
Tracie Hampton*	Current member	8812 Deerland Court	Huntersville, NC 28078
Ronald Long		1567 Dale Earnhardt Boulevard	Kannapolis, NC 28083
Millicent Malit**		3178 Helmsley Court	Concord, NC 28027
Norman McCullough		2315 Montford Ave NW	Concord, NC 28027
Crystal Nesbit		1217 Opal Street	Kannapolis, NC 28083
Christine Plough		2572 Brackley Place NW	Concord, NC 28027
Elizabeth Poole		210 Ravine Circle SE	Concord, NC 28025
Catherine Whiteford		106 Somerset Court, Apt. 26	Concord, NC 28027

*An exception to the residency provision of the Appointment Policy would be needed.
**An exception to the multiple service provision of the Appointment Policy would be needed.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Mount Pleasant Planning Board and Board of Adjustment (ETJ)

BRIEF SUMMARY:
The terms of Mount Pleasant Planning Board and Board of Adjustment (ETJ) members Bridget Fowler and Whit Moose, Jr. ends June 30th. The Town Board met and recommends both be reappointed to serve another term. Mr. Moose has served on this Board since 2004. An exception to the length of service provision of the Appointment Policy will be needed for him.

REQUESTED ACTION:
Motion to reappoint Bridget Fowler and Whit Moose, Jr. to the Mount Pleasant Planning Board and Board of Adjustment as ETJ representatives for three-year terms ending June 30, 2025; including an exception to the length of service provision of the Appointment Policy for Mr. Moose.

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.

ATTACHMENTS:

- Roster
- Applications on File

MT. PLEASANT PLANNING BOARD AND BOARD OF ADJUSTMENT

3-Year Terms

3 Members - Appointed by Mt. Pleasant
2 Members - Appointed by Cabarrus County

COUNTY APPOINTEES (EXTRATERRITORIAL JURISDICTION)

Bridget Fowler	**APPOINTMENT:**	**08/19/19**
P.O. Box 87		
Mt. Pleasant, NC 28124	**TERM EXPIRING:**	**06/30/22**

William Whitaker Moose, Jr.	**APPOINTMENT:**	**06/15/04**
P. O. Box 206	**REAPPOINTMENT:**	**07/23/07**
Mt. Pleasant, NC 28124	**REAPPOINTMENT:**	**07/19/10**
	REAPPOINTMENT:	**06/17/13***
	REAPPOINTMENT:	**06/20/16***
	REAPPOINTMENT:	**08/19/19***
	TERM EXPIRING:	**06/30/22**

***Exception to the "length of service" provision of the Appointment Policy was granted.**

(The Town of Mt. Pleasant combined the Mt. Pleasant Planning and Zoning Board and the Mt. Pleasant Zoning Board of Adjustment in 1986.)

Members must live within the extraterritorial jurisdictional area of the Town of Mt. Pleasant.

MT. PLEASANT PLANNING BOARD AND BOARD OF ADJUSTMENT

Applications on File

May 10, 2022

Bridget Fowler*	P.O. Box l87	Mt. Pleasant, NC 28124
William Whitaker Moose, Jr.*^	P.O. Box 206	Mt. Pleasant, NC 28124

*Current Member

^An exception to the length of service provision of the Appointment Policy would be needed.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Public Health Authority of Cabarrus County

BRIEF SUMMARY:
The terms for the following members on the Public Health Authority end June 30, 2022: Steve Morris (Board of Commissioners), Asha Rodriquez (Atrium Health-Cabarrus), Daryle Adams (Kannapolis City Schools), and Dr. Kimberly Dehler (Dentist). All are recommended for reappointment to serve another term. Dr. Dehler resides in Mecklenburg County. An exception to the residency provision of the Appointment Policy will be needed for her.

REQUESTED ACTION:
Motion to reappoint Steve Morris (Board of Commissioners), Asha Rodriquez (Atrium Health-Cabarrus), Daryle Adams (Kannapolis City Schools), and Dr. Kimberly Dehler (Dentist) to the Public Health Authority of Cabarrus County for three-year terms ending June 30, 2025.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Raquesha B. Franklin, Clerk to the Board, Cabarrus County Public Health Authority

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.

ATTACHMENTS:

- Roster
- Applications on File

PUBLIC HEALTH AUTHORITY OF CABARRUS COUNTY

9-Member Board
3-year terms

Member	Representing	Date of Appointment
Dr. Dan Hagler 355 Redwood Lane NW, Unit A Concord, NC 28027	Expertise in Infectious Diseases	Appointment: 07/21/20 Term Ending: 06/30/23
Dr. Lara Pons 1886 Waldeck Court Mt. Pleasant, NC 28124	Family Medicine Physician	Appointment: 06/19/17 Reappointment: 06/15/20 Term Ending: 06/30/23
Cecilia Plez 4799 Asherton Place NW Concord, NC 28027	Public Member (Unaffiliated With Foregoing)	Appointment: 06/21/21 Effective: 07/01/21 Term Ending: 06/30/24
Mark Spitzer 2115 Golfcrest Drive Kannapolis, NC 28081	Public Member (Unaffiliated With Foregoing)	Appointment: 06/18/18^ Reappointment: 06/21/21^ Term Ending: 06/30/24
Dr. Chip Buckwell 1506 Daybreak Ridge Road Kannapolis, NC 28081	Public Member (Unaffiliated With Foregoing)	Appointment: 03/21/22 (unexpired term) Term Ending: 06/30/24
Steve Morris P. O. Box 707 Concord, NC 28026	Member, Cabarrus Co. Board of Commissioners	Appointment: 07/15/13 (unexpired term) Reappointment: 06/20/16 Reappointment: 07/29/19 Term Ending: 06/30/22
Asha Rodriquez 9611 Ashley Green Court Concord, NC 28027	Member, Atrium Health-Cabarrus Local Governing or Advisory Board	Appointment: 12/20/21 (unexpired term) Term Ending: 06/30/22
Daryle Adams 234 Scenic Drive Concord, NC 28025	Leadership Representative, Kannapolis City Schools	Appointment: 06/21/21 (unexpired term) Effective: 07/01/21 Term Ending: 06/30/22
Dr. Kimberly Dehler 130 Wendover Heights Circle Charlotte, NC 28211	Dentist	Appointment: 10/21/19^ Term Ending: 06/30/22

(10/21/96 – Adoption of Resolution Establishing Authority with Board members)
(05/97 – Re-adoption of Public Health Authority Resolution)
(4/20/98 Health Board Dissolved)

^Exception to the Appointment Policy "residency" provision.
***Exception to the Appointment Policy "length of service" provision.**

The Public Health Authority Board has transitioned to a 9-member board effective July 1, 2019, under new by-laws adopted by the Board on May 14, 2019 and approved by the Cabarrus County Board of Commissioners on June 17, 2019.

CHA Board Meetings effective April 9, 2012:
Cabarrus Health Alliance, Board Room
300 Mooresville Road
Kannapolis, North Carolina 28081

Cabarrus Health Alliance Board members have not ever been compensated.

Public Health Authority of Cabarrus County
Applications on File
May 20, 2022

Daryle Adams	Current Member	234 Scenic Drive	Concord, NC 28025
Dr. Kimberly Dehler^	Current Member	130 Wendover Heights Circle	Charlotte, NC 28211
Angel Lugo*		4615 Dovefield Lane	Kannapolis, NC 28081
Jason Riopelle		1631 McManus Road	Midland, NC 28107
Asha Rodriquez	Current Member	9611 Ashley Green Court	Concord, NC 28027

*An exception to the multiple service provision of the Appointment Policy would be needed.
^An exception to the residency provision of the Appointment Policy would be needed.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Transportation Advisory Board

BRIEF SUMMARY:
Transportation Advisory Board (TAB) members Judy Coble (LIFE Center), and Jon Bradley (County Safety Manager) have terms ending June 30, 2022. Both are willing to serve another term. Ms. Coble has served on the TAB since 2013 and also resides in Rowan County. An exception to the length of service and residency provisions of the Appointment Policy will be needed for her.

REQUESTED ACTION:
Motion to reappoint Judy Coble (LIFE Center), and Jon Bradley (County Safety Manager) to the Transportation Advisory Board for three-year terms ending June 30, 2025; including an exception to the length of service and residency provisions of the Appointment Policy for Ms. Coble.

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.

ATTACHMENTS:

- Roster
- Applications on File

TRANSPORTATION ADVISORY BOARD
18 MEMBERS

Appointee	Agency Represented	Term of Appointment
Vacant	**Citizen Advocate/ Retired**	**APPOINTMENT:** **TERM EXPIRING: 06/30/21**
Charles Hendrix **185 Corban Avenue SE** **Concord, NC 28025** ***(6/15/20 – Exception to Appt. Policy)***	**Citizen Advocate/ ADA**	**APPOINTMENT: 01/21/14** **REAPPOINTMENT: 05/15/17** **REAPPOINTMENT: 06/15/20** **TERM EXPIRING: 06/30/23**
Art Whittaker **30102 Westridge Court** **Albemarle, NC 28001** ***(11/15/15 – Exception to Appt. Policy)*** ***(06/18/18 – Exception to Appt. Policy)*** ***(06/21/21 – Exception to Appt. Policy)***	**County Schools**	**APPOINTMENT: 11/16/15** **REAPPOINTMENT: 06/18/18** **REAPPOINTMENT: 06/21/21** **TERM EXPIRING: 06/30/24**
Amy Nance **DHS Employee** **Dept. of Human Services** **1303 S. Cannon Boulevard** **Kannapolis, NC 28083**	**Human Services DSS**	**APPOINTMENT: 06/15/20** **TERM EXPIRING: 06/30/23**
Mitchell Burris **401 Laureate Way** **Kannapolis, NC 28081** ***(06/21/21 – Exception to Appt. Policy)***	**Law Enforcement**	**APPOINTMENT: 09/21/15** **REAPPOINTMENT: 06/18/18** **REAPPOINTMENT: 06/21/21** **TERM EXPIRING: 06/30/24**
Vacant	**Hispanic Community**	**APPOINTMENT:** **TERM EXPIRING: 06/30/21**
Anthony Hodges **DHS Employee** **Dept. of Human Services** **1303 S. Cannon Boulevard** **Kannapolis, NC 28083** ***(05/15/17 – Exception to Appt. Policy)*** ***(08/18/18 – Exception to Appt. Policy)*** ***(06/21/21 – Exception to Appt. Policy)***	**Human Services Aging**	**APPOINTMENT: 05/15/17** **(unexpired term)** **REAPPOINTMENT: 06/18/18** **REAPPOINTMENT: 06/21/21** **TERM EXPIRING: 06/30/24**
Vacant	**Midland Area**	**APPOINTMENT:** **TERM EXPIRING:**

Skip Kraft	**Vocational/Sheltered Workshops**	**APPOINTMENT: 07/20/15**
100 B Willow Road		**REAPPOINTMENT: 06/18/18**
Salisbury, NC 28147		**REAPPOINTMENT: 06/21/21**
(07/20/15 – Exception to Appt. Policy)		**TERM EXPIRING: 06/30/24**
(06/18/18 – Exception to Appt. Policy)		
(06/21/21 – Exception to Appt. Policy)		
(Ex Officio Member)		

Megan Shuping	**Cab. Health Alliance Healthy Cabarrus**	**APPOINTMENT: 06/18/18 (unexpired term)**
99 Hillside Avenue SW		**REAPPOINTMENT: 06/17/19**
Concord, NC 28025		**TERM EXPIRING: 06/30/22**
(6/17/19 – Exception to Appt. Policy)		

Ann Benfield	**Head Start**	**APPOINTMENT: 07/20/15**
653 Marigold Drive		**REAPPOINTMENT: 06/18/18**
Kannapolis, NC 28083		**REAPPOINTMENT: 06/21/21**
(06/21/21 – Exception to Appt. Policy)		**TERM EXPIRING: 06/30/24**

Vacant	**NC Mental Health**	**APPOINTMENT:**
		TERM EXPIRING: 06/30/18
(Ex Officio Member)		

Judy Coble	**LIFE Center**	**APPOINTMENT: 08/19/13**
Coltrane LIFE Center		**REAPPOINTMENT: 06/20/16**
321 Corban Avenue SE		**REAPPOINTMENT: 06/17/19**
Concord, NC 28025		**TERM EXPIRING: 06/30/22**
(Ex Officio Member)		
(8/19/13 – Exception to Appt. Policy)		
(6/20/16 – Exception to Appt. Policy)		
(6/17/19 – Exception to Appt. Policy)		

Michelle Dietrich	**Cabarrus EMS**	**APPOINTMENT: 01/16/18 (unexpired term)**
Cabarrus EMS		
31 Willowbrook Drive		**REAPPOINTMENT: 06/17/19**
Concord, NC 28027		**TERM EXPIRING: 06/30/22**
(6/17/19 – Exception to Appt. Policy)		

Vacant	**Social Work (Blind)**	**APPOINTMENT:**
		TERM EXPIRING: 06/30/21
(EX Officio Member)		

Jon Bradley	**County Safety Mgr.**	**APPOINTMENT: 08/19/19**
P.O. Box 707		
Concord, NC 28026		**TERM EXPIRING: 06/30/22**
(8/19/19 – Exception to Appt. Policy)		

James Polk	**Citizen Advocate/**	**APPOINTMENT: 01/21/14**
224 Deal Street SE	**Aging**	**REAPPOINTMENT: 05/15/17**
Concord, NC 28025		**REAPPOINTMENT: 06/15/20**
(1/21/14 – Exception to Appt. Policy)		**TERM EXPIRING: 06/30/23**
(5/15/17 – Exception to Appt. Policy)		
(6/15/20 – Exception to Appt. Policy)		
Vacant	**Local Clergy**	**APPOINTMENT:**
		TERM EXPIRING:

Established July 22, 1991; Expanded March 26, 2001 (Effective July 1, 2001); Additional Members added December 17, 2001 and April 21, 2003

Note: On July 20, 2009, per the Transportation Department, the addition of the "Local Clergy" position was added to the roster at the request of the State.

Note: On June 20, 2011, the "retired" position was reclassified as "law enforcement" and "Lifespan" was reclassified as "citizen advocate/retired".

Note: On November 16, 2015, the "Human Services Aging position was reclassified as "Hispanic Community"; the "Human Services - DSS" position to Human Services – Aging", "Human Services" position to "Human services – DSS"; and "Supported Employment" position to "Vocational/Sheltered Workshops".

Transportation Advisory Board
Applications on File
May 24, 2022

Jon Bradley	Current member	P.O. Box 707	Concord, NC 28026
Judy Coble*^	Current member	321 Corban Avenue SE	Concord, NC 28025
Carson Cone		1208 Doncastle Court	Concord, NC 28027
Jennifer Cotton		10024 Fox Trotter Lane	Midland, NC 28107
Kenneth Wortman		5681 Mountaineer Lane	Concord, NC 28025

*The length of service provision of the Appointment Policy will be needed.
^The residency provision of the Appointment Policy will be needed.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments and Removals - Juvenile Crime Prevention Council

BRIEF SUMMARY:
The terms for the following Juvenile Crime Prevention Council (JCPC) members end June 30, 2022: Jamica La Franque (At-large), Beth Street (District Attorney/Designee), Terry Wise (Substance Abuse Professional), and Michelle Wilson (At-large). At the JCPC's May meeting, the Council unanimously voted to recommend all four to be reappointed to serve another term. Michelle Wilson has served on the JCPC since 2009. An exception to the length of service provision of the Appointment Policy will be needed for her.

Additionally, the Council voted to accept the resignation of JCPC member Perry Gabriel (Active Living and Parks), who is retiring next month.

REQUESTED ACTION:
Motion to remove Perry Gabriel (Active Living and Parks) from the Juvenile Crime Prevention Council roster and thank him for his service.

Motion to reappoint Jamica La Franque (At-large), Beth Street (District Attorney/Designee), Terry Wise (Substance Abuse Professional), and Michelle Wilson (At-large) to the Juvenile Crime Prevention Council for two-year terms ending June 30, 2024; including an exception to the length of service provision of the Appointment Policy for Ms. Wilson.

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.

ATTACHMENTS:

- Resignation Letter
- Roster
- Applications on File

CABARRUS COUNTY
America Thrives Here

To: Joanie Bischer, Administrative Assistant, JCPC

Megan Baumgardner, JCPC Chair

From: Perry Gabriel, Sr. Park Manager

Re: Resignation

Date: May 10, 2022

This letter is to inform you that I will be resigning from my position with JCPC effective June 29, 2022 due to my retirement from Cabarrus County at that time. The May 2022 meeting will be my last as I will be out of town for the June 2022 meeting. It has been a pleasure working with the JCPC council over the last 12 years and I wish you and all the programs well in the future.

Thank you.

Active Living & Parks
331 Corban Ave., Concord, NC 28025 • PO Box 707, Concord, NC 28026
Phone 704-920-3484 • Fax 704-920-3494
cabarruscounty.us/alp

JUVENILE CRIME PREVENTION COUNCIL
2-Year Terms

	Appointee	Representing	Term of Appointment
(1)	Amy Jewell 9287 Naron Lane Harrisburg, NC 28075	School Superintendent (Designee)	Appointment: 07/21/20**** Term Ending: 09/30/22
(2)	Matthew Greer 41 Cabarrus Avenue W Concord, NC 28025	Police Chief (Designee)	Appointment: 10/18/21 Term Ending: 09/30/23
(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)	LaShay Avery 5025 Lydney Circle Waxhaw, NC 28173	Area Mental Health Director (Designee)	Appointment: 11/15/21 (unexpired term) 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^^ Reappointment: 09/20/21^ Term Ending: 09/30/23
(8)	Rodney Harris P. O. Box 707 Concord, NC 28026-0707	County Manager (or Designee)	Appointment: 12/21/20< (unexpired term) Reappointment: 09/20/21 Term Ending: 09/30/23
(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* Reappointment: 09/20/21* Term Ending: 09/30/23
(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 Reappointment: 12/20/21 Term Ending: 12/31/22
(12a)	Vacant	Student < 18 CCS	Appointment: Term Ending: 06/30/20
(12b)	Vacant	Student <18 KCS	Appointment: Term Ending: 06/30/23
(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^ Reappointment: 06/21/21^ Term Ending: 06/30/23
(14)	Judge Steve Grossman County Courthouse P. O. Box 70 Concord, NC 28026-0070	Chief District Court Judge (Designee)	Appointment: 06/21/21 Term Ending: 06/30/23
(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* Reappointment: 09/20/21* Term Ending: 09/30/23

(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* Reappointment: 09/20/21* Term Ending: 09/30/23
(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* Reappointment: 06/21/21* Term Ending: 06/30/23
(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: 0717/18 Reappointment: 07/21/20 Term Ending: 06/30/22
(19c)	Joy Butler 2024 Breezewood Drive Charlotte, NC 28262	Appointment: 07/21/20 (unexpired term) Reappointment: 09/20/21^ Term Ending: 09/30/23
(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* Reappointment: 06/21/21* Term Ending: 06/30/23
(19f)	Megan Baumgardner (Chairman) 7120 Macedonia Ch. Rd. Concord, NC 28027	Appointment: 01/19/10 (unexpired term) Reappointment: 06/21/10 Reappointment: 06/18/12 Reappointment: 06/16/14 Reappointment: 06/20/16*< Reappointment: 06/18/18*< Appointment: 08/19/19*< (unexpired term) Reappointment: 09/21/20*< Term Ending: 09/30/22
(19g)	Marta Meares 178 Mary Circle Concord, NC 28025	Appointment: 05/18/09 (unexpired term) Reappointment: 09/21/09 Reappointment: 09/19/11 Reappointment: 09/16/13 Reappointment: 09/21/15* Reappointment: 10/16/17* Reappointment: 09/16/19* Reappointment: 09/20/21* Term Ending: 09/30/23

* 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
May 26, 2022

Addul Ali		2012 Carolina Avenue	Kannapolis, NC 28081
Andrea Bonds		1410 Moss Creek Drive	Harrisburg, NC 28075
Deborah Caldwell		1308 Mistletoe Ridge Place NW	Concord, NC 28025
Janie Caldwell*		14 Nelson Avenue	Charlotte, NC 28216
Mary Caldwell		3300 Rock Hill Church Road	Concord, NC 28025
Chelsea Carpenter		8219 Scarlet Oak Court	Harrisburg, NC 28075
Jennifer Cotton		10024 Fox Trotter Lane	Midland, NC 28107
Christopher Covington		1100 Seasons Place NW, Apt 301	Concord, NC 28027
Willie Fisher		341 Courtland Court	Kannapolis, NC 28081
Ashley Fitch		6115 The Meadows Lane	Harrisburg, NC 28075
Ann Fleming		385 Freedom Street SW	Concord, NC 28025
Kimberly Grant-Flythe		3288 Oulten Street SW	Concord, NC 28025
Kevin Griffin		10298 Avenue NW	Concord, NC 28027
Suzanne Irvin		1001 Valley Street	Kannapolis, NC 28081
Mandee LaCroix**		3044 Champion Lane SW	Concord, NC 28025
Jamica La Franque	Current Member	3852 French Fields Lane	Harrisburg, NC 28075
Jack Lambert		14 Union Street N	Concord, NC 28025
Yolanda Lowery		2271 Drake Mill Lane SW	Concord, NC 28025
Jennifer McBride		486 Camrose Circle NE	Concord, NC 28025

Norman McCullough		2315 Montford Avenue NW	Concord, NC 28025
Myia Payne		12530 Palomino Drive	Midland, NC 28107
Christine Plough		2572 Brackley Place NW	Concord, NC 28025
David Roundtree		6186 Roseway Court	Harrisburg, NC 28075
Clairesa Scales		11623 Baystone Place	Concord, NC 28025
Kim Sexton-Lewter		1832 Mary Wynn Court	Kannapolis, NC 28081
Taina Shaw		455 Caldwell Drive SE	Concord, NC 28025
Kimberly Shipp		P.O. Box 1905	Kannapolis, NC 28082
Amanda Smith		5352 Apple Glen Drive	Harrisburg, NC 28075
Grace Smith		7895 Waterway Drive NW, Apt. 306	Concord, NC 28027
Beth Street	Current Member	509 Burrage Road	Concord, NC 28025
Kevin Vinson**		P.O. Box 8012	Concord, NC 28027
Devante' Watkins		3590 Coventry Commons Ave SW	Concord, NC 28027
Cynthia Wilkerson		4415 Tom Reid Road	Concord, NC 28025
Michelle Wilson^	Current Member	41 Eastcliff Drive SE	Concord, NC 28025
Terry Wise	Current Member	391 Knoll Court SE	Concord, NC 28025

*An exception to the residency provision of the Appointment Policy would be needed.
**An exception to the service on multiple boards provision of the Appointment Policy would be needed.
^An exception to the length of service provision of the Appointment Policy would be needed.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments and Removals - Tourism Authority of Cabarrus County

BRIEF SUMMARY:
The Cabarrus County Tourism Authority has 4 seats that need to be appointed for the term commencing July 1, 2022 and ending on June 30, 2025. The nominating group and their nominees are as follows:

- Cabarrus County - Seat # 7 Alan Benson*^
- Cabarrus County Tourism Authority - Seat #8 Angela Brown
- Cabarrus Regional Chamber of Commerce - Seat # 9 Paige Grochoske
- Cabarrus County Tourism Authority - Seat # 12 Jay White*

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

REQUESTED ACTION:
Motion to remove Tammy Whaley and Pritesh Nagarji from the Cabarrus County Tourism Authority roster and thank them for their many years of service.

Motion to appoint Paige Grochoske (Seat #9), and Angela Brown (Seat #8) to the Cabarrus County Tourism Authority for three-year terms commencing July 1, 2022 and ending June 30, 2025.

Motion to reappoint Alan Benson (Seat #7), and Jay White (Seat #12), to the Cabarrus County Tourism Authority for three-year terms commencing July 1, 2022 and ending June 30, 2025; including an exception to the residency provision of the Appointment Policy for Mr. Benson.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
John Mills, Executive Vice President
Cabarrus County Convention and Visitors Bureau

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.

ATTACHMENTS:

- Letter of Recommendation
- Letter of Recommendation
- Letter of Recommendation
- Roster
- Applications on File

CABARRUS
COUNTY CVB

May 25,2022

Dear Cabarrus County Board of Commissioners:

This letter is to notify you of the nominee for seat #8 on the Cabarrus County Tourism Authority Board of Directors. The nominee is:

Angie Brown

The Tourism Authority would like to appoint Angie Brown for Seat #8 for three (3) years commencing July 1, 2022 and ending on June 30, 2025.

Sincerely

Owen Parker
Chairman, Board of Directors
Cabarrus County Tourism Authority

The Chamber
LEADING BUSINESS IN CABARRUS

March 14, 2021

Mrs. Donna Carpenter, President/CEO
Cabarrus County Convention and Visitors Bureau
10099 Weddington Road, Suite 102
Concord, North Carolina 28027

Dear Donna,

On behalf of The Chamber, Leading Business in Cabarrus, we would like for Paige Grochoske of The Chamber to serve a first term on the Cabarrus County Convention and Visitors Bureau Board of Directors to fill the Chamber At-Large seat number nine (9), beginning July 1, 2022 and expire on June 30, 2025.

Thank you for your consideration.

Best regards,

Barbi Jones
Executive Director

CABARRUS
COUNTY CVB

May 25, 2022

Dear Cabarrus County Board of Commissioners:

This letter is to notify you of the nominee for seat #12 on the Cabarrus County Tourism Authority Board of Directors. The nominee is:

Jay White

The Tourism Authority would like to reappoint Jay White for Seat #12 for three (3) years commencing July 1, 2022 and ending on June 30, 2025.

Sincerely

Owen Parker
Chairman, Board of Directors
Cabarrus County Tourism Authority

TOURISM AUTHORITY
12 Members
3-Year Terms

Appointee	Seat Number	Term of Appointment
BOC MEMBER OR COUNTY MANAGER (AT-LARGE)		
Diane R. Honeycutt County Commissioner P.O. Box 707 Concord, NC 28026	4	APPOINTMENT: 07/18/16 (unexpired term) REAPPOINTMENT: 06/18/18 REAPPOINTMENT: 06/21/21 TERM EXPIRING: 06/30/24
HOTELIER (AT-LARGE)		
Alan Benson 9015 Meadowmont View Drive Charlotte, NC 28269 *(exception to appt. policy)	7	APPOINTMENT: 09/21/20* TERM EXPIRING: 06/30/22
AT-LARGE		
Mike Downs P.O. Box 707 Concord, NC 28026	1	APPOINTMENT: 06/15/20 TERM EXPIRING: 06/30/23
NOMINATED BY CABARRUS COUNTY TOURISM AUTHORITY		
AT-LARGE		
Terry Crawford 5576 Yorke Street NW Concord, NC 28027	5	APPOINTMENT: 06/18/18 REAPPOINTMENT: 06/21/21 TERM EXPIRING: 06/30/24
HOTELIER		
Pritesh Nagarji P.O. Box 1919 Huntersville, NC 28070-1919 *(exception to appt. policy)	8	APPOINTMENT: 02/17/14* (unexpired term) REAPPOINTMENT: 06/20/16* REAPPOINTMENT: 06/17/19* TERM EXPIRING: 06/30/22
TOURISM ACTIVIST		
Greg Walter 12539 Overlook Mountain Drive Charlotte, NC 28216 *(exception to appt. policy)	2	APPOINTMENT: 06/15/20* TERM EXPIRING: 06/30/23
TOURISM ACTIVIST		
Steve Steinbacher 1513 Hansom Lane Concord, NC 28027	10	APPOINTMENT: 05/21/18 (unexpired term) REAPPOINTMENT: 06/15/20 TERM EXPIRING: 06/30/23

HOTELIER

Vinay Patel	**11**	**APPOINTMENT: 06/21/21***
9230 Hollybush Lane		**EFFECTIVE: 07/01/21**
Charlotte, NC 28277		**TERM EXPIRING: 06/30/24**

***(exception to appt. policy)**

AT-LARGE

Jay White	**12**	**APPOINTMENT: 07/17/18**
5601 Meadow Bluff Court		**(unexpired term)**
Concord, NC 28027		**REAPPOINTMENT: 06/17/19**
		TERM EXPIRING: 06/30/22

NOMINATED BY THE CABARRUS REGIONAL CHAMBER OF COMMERCE

HOTELIER

Owen Parker	**6**	**APPOINTMENT: 06/18/18**
11588 Crossroads Place		**REAPPOINTMENT: 06/21/21**
Concord, NC 28025		**TERM EXPIRING: 06/30/24**

At-LARGE

Tammy Whaley	**9**	**APPOINTMENT: 08/19/13**
6551 Derby Lane NW		**(unexpired term)**
Concord, NC 28027		**REAPPOINTMENT: 06/20/16**
		REAPPOINTMENT: 06/17/19
		TERM EXPIRING: 06/30/22

AT-LARGE

Patricia Horton	**3**	**APPOINTMENT: 06/19/17**
1951 Highway 73 East		**REAPPOINTMENT: 06/15/20**
Concord, NC 28025		**TERM EXPIRING: 06/30/23**

Meetings: 4th Wednesday of each month - 8:00 A.M. Location is announced.

Note: The Board ratified the change in term expiration for members of the Tourism Authority as set forth in Article 4, Section 4.3, (Composition; Appointment; Term.) of the Authority's bylaws, as adopted by the Authority on July 22, 2008.

Seats 10, 11 and 12 were added per Senate Bill 1357 by the General Assembly, Session 2009.

Note: In order to align with current Cabarrus County Tourism Authority legislation and by-laws, the Board transferred Angie Brown from Seat #5 to Seat #11 and transferred Jennifer Parsley from Seat #11 to Seat #5 as requested from the CVB Board of Directors.

Cabarrus County Tourism Authority
Applications on File
May 26, 2022

Alan Benson*<	9015 Meadowmont View Drive	Charlotte, NC 28269
Angela Brown	2664 Kinsley Avenue NW	Concord, NC 28027
Sujit Chemburkar	8213 Appaloosa Lane	Charlotte, NC 28215
Tyler Conley	3719 Solen Drive	Harrisburg, NC 28075
Kevin Crutchfield^	9817 Mt. Pleasant Road S	Midland, NC 28107
Paige Grochoske	153 Franklin Avenue NW	Concord, NC 28025
Devante' Watkins	3590 Coventry Commons Avenue SW	Concord, NC 28027
Jay White^	5601 Meadow Bluff Court	Concord, NC 28027

*Current member.
^ An exception to the multiple service provision of the Appointment Policy would be needed.
<An exception to the residency provision of the Appointment Policy would be needed.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments (Removals) - Adult Care Home Community Advisory Committee

BRIEF SUMMARY:
Adult Care Home Community Advisory Committee member Ed Burns' term ended May 31, 2022. He is not interested in serving another term. Mr. Burns has served on this committee since 2009. It is requested to remove his name from the roster.

Richard Bovard has resigned from his position on the committee. It is also requested to remove his name from the roster.

REQUESTED ACTION:
Motion to remove Ed Burns and Richard Bovard from the Adult Care Home Community Advisory Committee roster and thank them for their service.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Rachel Kiel, Regional Ombudsman
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.

ATTACHMENTS:

- Removal Request
- Removal Request
- Roster

DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF AGING AND ADULT SERVICES
OFFICE OF THE STATE LONG-TERM CARE OMBUDSMAN

NOTIFICATION REQUESTING REMOVAL OF COMMUNITY ADVISORY COMMITTEE MEMBER(S)

TO: Clerk/County Manager: Lauren Linker
FROM: Rachel Kiel**, Regional Ombudsman** **Region:** F
Volunteer Name: Ed Burns **County Served:** Cabarrus
Date: May 2, 2022
County Committee Assignment: ☒ **Adult Care Home** ☐ **Nursing Home** ☐ **Joint**
Date of Appointment: 05/18/2009

Reason for Request Summary: Does not want to apply for re-appointment at the end of his term.

COVID-19 Related: YES ☐ **NO** ☒

Volunteers are a vital part of the services that support older adults in your county. However, the volunteer indicated above has been de-designated by the Office of the State Long-Term Care Ombudsman and is no longer eligible for continued service for the following reason:

____ Conflict of Interest
1. G.S. 131 E-128 (f) Nursing Home
2. G.S. 131 D-31 (g) Adult Care Home
3. 45 CFR §1324.21

____ Failure to attend required on-going training or complete required orientation and training.
1. G.S. 131 E- 128 (g) Nursing Home
2. G.S. 131 D- 31 (h) Adult Care Home

Dates offered: _____ _____ _____

___5_ Other (Non-attendance at quarterly meetings and facility visits)
1. As determined by the Long-Term Care Ombudsman Program Policies and Procedures
2. As determined by the committee by-laws
3. As determined by resignation of the member
4. As determined by removal of designation by the Office of the State Long-Term Care Ombudsman
5. Expiration of term
6. Committee member is deceased

This is an official notification to the Board of Commissioners to remove named individual from service on the above-mentioned committee (HB 248, July 2017). Should you have any questions, please contact Rachel Kiel, **Regional Ombudsman,** 704-348-2739. Thank you in advance for your prompt attention to this matter.

9815 David Taylor Drive, Suite 100 | Charlotte, NC 28262
Phone: 704-372-2406 *Fax:* 704-347-47610

Revised 08/25/2021

DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF AGING AND ADULT SERVICES
OFFICE OF THE STATE LONG-TERM CARE OMBUDSMAN

NOTIFICATION REQUESTING REMOVAL OF COMMUNITY ADVISORY COMMITTEE MEMBER(S)

TO: Clerk/County Manager : Lauren Linker
FROM: Rachel Kiel , Regional Ombudsman Region: F
Volunteer Name: Richard Bovard County Served: Cabarrus
Date: 4-14-22
County Committee Assignment: x Adult Care Home Nursing Home Joint
Date of Appointment: 3/7/2019

Reason for Request:

COVID-19 Related: YES NO:x

Volunteers are a vital part of the services that support older adults in your county. However, the volunteer indicated above has been de-designated by the Office of the State Long-Term Care Ombudsman and is no longer eligible for continued service for the following reason:

_____ Conflict of Interest

1. G.S. 131 E-128 (f) Nursing Home
2. G.S. 131 D-31 (g) Adult Care Home
3. 45 CFR §1324.21

_____ Failure to attend required on-going training or complete required orientation and training.

1. G.S. 131 E- 128 (g) Nursing Home
2. G.S. 131 D- 31 (h) Adult Care Home

Dates offered: _____ _____ _____

__3___ Other (Non-attendance at quarterly meetings and facility visits)

1. As determined by the Long-Term Care Ombudsman Program Policies and Procedures
2. As determined by the committee by-laws
3. As determined by resignation of the member
4. As determined by removal of designation by the Office of the State Long-Term Care Ombudsman
5. Expiration of term
6. Committee member is deceased

This is an official notification to the Board of Commissioners to remove named individual from service on the above-mentioned committee (HB 248, July 2017). Should you have any questions, please contact Rachel Kiel **, Regional Ombudsman, 704-348-2739**. Thank you in advance for your prompt attention to this matter.

ADULT CARE HOME COMMUNITY ADVISORY COMMITTEE
(Formerly Domiciliary Home Community Advisory Committee)
3-Year Term
17-Member Board

Ed Burns	**APPOINTMENT:**	**05/18/09**
4222 Mackenzie Court	**REAPPOINTMENT:**	**06/21/10**
Concord, NC 28027	**REAPPOINTMENT:**	**05/20/13**
	REAPPOINTMENT:	**03/21/16***
	REAPPOINTMENT:	**04/15/19***
	TERM EXPIRING:	**05/31/22**
Sandra Miller	**APPOINTMENT:**	**07/18/11**
1120 Brigadoon Court	**REAPPOINTMENT:**	**07/16/12**
Concord, NC 28025	**REAPPOINTMENT:**	**08/17/15**
	REAPPOINTMENT:	**08/20/18***
	REAPPOINTMENT:	**07/19/21***
	TERM EXPIRING:	**07/31/24**
Diamond Staton-Williams	**APPOINTMENT:**	**07/21/14**
6626 Burkwood Court	**REAPPOINTMENT:**	**08/17/15**
Harrisburg, NC 28075	**REAPPOINTMENT:**	**08/20/18**
	REAPPOINTMENT:	**07/19/21***
	TERM EXPIRING:	**07/31/24**
Diane Carlson	**APPOINTMENT:**	**10/19/15**
4429 Turnberry Court	**REAPPOINTMENT:**	**09/19/16**
Concord, NC 28027	**REAPPOINTMENT:**	**10/21/19**
	TERM EXPIRING:	**10/31/22**
Helen McInnnis	**APPOINTMENT:**	**02/18/19***
5517 Hammermill Drive	**REAPPOINTMENT:**	**02/17/20***
Harrisburg, NC 28075	**TERM EXPIRING:**	**02/29/23**
Richard Bovard	**APPOINTMENT:**	**04/15/19**
9170 U.S. 601	**REAPPOINTMENT:**	**07/21/20**
Midland, NC 28107	**TERM EXPIRING:**	**04/30/23**
Angela Foard	**APPOINTMENT:**	**10/18/21**
3991 Quiet Stream Drive		
Concord, NC 28025	**TERM EXPIRING:**	**10/31/22**

(10 VACANT Positions)
*** Exception to Appointment Policy**

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments (Removals) - Cabarrus County Youth Commission

BRIEF SUMMARY:
The Cabarrus County Youth Commission has several members who graduated in May of 2022. We request that their names be removed from the roster.

Tisha Abdul - Cox Mill High School
Nisha Jakkinpali - Hickory Ridge High School
Lainey Rose Lancaster - Mount Pleasant High School

Additionally, several Cabarrus County Youth Commissioner members terms have ended. We request that their names be removed from the roster.

Emma Hogle - Central Cabarrus High School
Neerali Parikh - Concord High School
Tizita Henderson - Hickory Ridge High School
Kylie Greenelsh - Mount Pleasant High School
Natellie Anderson - Early College High School

We are currently accepting new applications and look forward to interviewing in the fall.

REQUESTED ACTION:
Motion to remove the following members be removed from the Cabarrus County Youth Commission roster and thank them for their service: Tisha Abdul (Cox Mill High School), Nisha Jakkinpali (Hickory Ridge High School), Lainey Rose Lancaster (Mount Pleasant High School), Emma Hogle (Central Cabarrus High School), Neerali Parikh (Concord High School), Tizita Henderson (Hickory Ridge High School), Kylie Greenelsh

(Mount Pleasant High School), and Natellie Anderson (Early College High School).

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Tracy LeCompte, Cooperative Extension 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.

ATTACHMENTS:

- Removal Request
- Roster

N.C. Cooperative Extension
Cabarrus County Center
cabarrus.ces.ncsu.edu

715 Cabarrus Avenue W
Concord, NC 28027
P: 704-920-3310

May 13, 2022

Cabarrus County Commissioners
65 Church Street
Concord NC 28025

Dear Commissioners,

The 2021-2022 Youth Commission had a great year and is looking forward to kicking off a new year in the fall.

We have had multiple members who graduated in May of 2022. We request that their appointments be terminated and removed from the roster.

Tisha Abdul - Cox Mill High School
Nisha Jakkinpali - Hickory Ridge High School
Lainey Rose Lancaster - Mt. Pleasant High School

Additionally, a few Youth Commissioner terms have come to an end. We request that their appointments be removed from the roster.

Emma Hogle - Central Cabarrus High School
Neerali Parikh - Concord High School
Tizita Henderson - Hickory Ridge High School
Kylie Greenelsh - Mt. Pleasant High School
Natellie Anderson - Early College High School

We are currently accepting new applications and look forward to interviewing in the fall.

Thank you for your continued support of this program.

Yours in 4-H,



Tracy LeCompte
County Extension Director, Cabarrus County Center

NC State University and N.C. A&T State University commit themselves to positive action to secure equal opportunity regardless of race, color, national origin, religion, political beliefs, family and marital status, sex, age, veteran status, sexual identity, genetic information or disability. NC State, N.C. A&T, U.S. Department of Agriculture, and local governments cooperating.

Cabarrus County Youth Commission
22 Members
2-Year Terms

Name	Graduating	School	Term	
Makhi Nash	2024	A.L. Brown High School	APPOINTMENT: TERM EXPIRING:	01-18-22 06-30-23
		A.L. Brown High School	APPOINTMENT: TERM EXPIRING:	
Emma Hogle	2023	Central Cabarrus High School	APPOINTMENT: TERM EXPIRING:	10-19-20 06-30-22
		Central Cabarrus High School	APPOINTMENT: TERM EXPIRING:	
Adit Kamdar	2025	Concord High School	APPOINTMENT: TERM EXPIRING:	10-18-21 06-30-23
Neerali Parikh	2023	Concord High School	APPOINTMENT: TERM EXPIRING:	10-19-20 06-30-22
Tisha Abdul	2022	Cox Mill High School	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	01-22-19 10-19-20 06-30-22
Vanessa Hurtado		Cox Mill High School	APPOINTMENT: TERM EXPIRING:	10-18-21 06-30-23
Nisha Jakkinpali	2022	Hickory Ridge High School	APPOINTMENT: TERM EXPIRING:	10-19-20 06-30-22
Tizita Henderson	2022	Hickory Ridge High School	APPOINTMENT: TERM EXPIRING:	01-19-21 06-30-22
		Jay M. Robinson High School	APPOINTMENT: TERM EXPIRING:	
		Jay M. Robinson High School	APPOINTMENT: TERM EXPIRING:	
Lainey Lancaster	2022	Mt. Pleasant High School	APPOINTMENT: REAPPOINTMENT: TERM EXPIRING:	12-16-19 10-18-21 06-30-23
Kylie Greenelsh	2023	Mt. Pleasant High School	APPOINTMENT: TERM EXPIRING:	10-19-20 06-30-22

		Northwest Cabarrus High School	APPOINTMENT: TERM EXPIRING:	
		Northwest Cabarrus High School	APPOINTMENT: TERM EXPIRING:	
		West Cabarrus High School	APPOINTMENT: TERM EXPIRING:	
		West Cabarrus High School	APPOINTMENT: TERM EXPIRING:	
Nattellie Anderson	2024	At Large	APPOINTMENT: TERM EXPIRING:	10-19-20 06-30-22
		At Large – Early College High School	APPOINTMENT: TERM EXPIRING:	
		At Large	APPOINTMENT: TERM EXPIRING:	
		At Large	APPOINTMENT: TERM EXPIRING:	

Note: The Board of Commissioners changed the terms to end on June 30 on March 19, 2012.

Note: Two (2) additional At-large positions were added per revised Youth Council's by-laws adopted by the Board of Commissioners July 21, 2014.

Note: The official name of the Cabarrus County Youth Council was amended to the Cabarrus County Youth Commission at the Board of Commissioners' meeting on February 16, 2015.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Cabarrus County Tourism Authority - FY2023 Budget Approval

BRIEF SUMMARY:
The Cabarrus County Tourism Authority's FY2023 proposed annual operating budget is $5,766,060. The Tourism Authority is funded by Occupancy Tax and is not supported by the County's General Fund. The Tourism Authority's Board of Directors approved the FY2023 proposed budget on April 27, 2022.

REQUESTED ACTION:
Motion to approve the Cabarrus County Tourism Authority's FY2023 Budget of $5,766,060.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
John Mills, CVB Executive Vice President

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.

ATTACHMENTS:

- CCTA FY2023 Budget Statement
- CCTA FY2023 Budget

FY2023 Budget Message

April 27, 2022

Cabarrus County CVB Board of Directors and Cabarrus County Board of Commissioners:

While the COVID pandemic has had an unprecedented impact on the tourism and hospitality industry, there are already signs pointing to a quicker than anticipated recovery. In the second half of 2021 Occupancy Tax revenues exceeded Occupancy Tax revenues from the same period in 2019, before the pandemic began. The recovery is being driven primarily by leisure travelers. This includes travelers who are in town visiting friends and family, experiencing Great Wolf Lodge, or attending an event. Business travel and group travel have yet to return to pre pandemic levels. Groups that were hopeful to start having meetings were delayed as COVID cases began increasing in January 2022. We have worked with our tourism partners to try and reschedule those events and we are hopeful to welcome them to Cabarrus County very soon. The addition of the new turf fields has created greater opportunities for more youth sporting events. The out-of-town groups that utilized the new fields in 2021 are already planning to return in 2022. During the budget process decisions were made utilizing the Bureau's Mission and Vision Statements.

MISSION

Drive visitation to Cabarrus County
to generate the maximum impact through hotel stays
and visitor spending.

VISION

To continually grow and sustain
a dynamic travel industry to become the
number one economic force for Cabarrus County

The budget for FY2023 of $5,766,060 represents an increase of 45% over FY2022. Lodging revenues are expected to increase by $1,779,997 compared to FY2022. The Bureau is still not operating at pre pandemic staffing levels. A few of the lost positions will be added back in over the next year to handle increased visitor demand. Also, the organization is going through a rebranding strategy and plans to launch new advertising campaigns in the summer of 2022. A new research partner, Zartico, has come online and the data their platform provides will allow the Bureau to have never before seen insights into the visitor economy of Cabarrus County.

I would like to thank the individuals who contributed to the preparation of the FY2023 budget and offer them my sincere gratitude.

Respectfully submitted,

Donna Carpenter
President/CEO - Cabarrus County Tourism Authority

Revenues:

The CCTA receives 99% of its revenue through a 6% Occupancy Tax levied on guests who stay in Cabarrus County Hotels. This tax rate is not expected to change in FY2023.

Occupancy Tax:

Actual FY2021	3,748,424
Budget FY2022	3,950,003
Budget FY2023	5,730,000

Occupancy Taxes are budgeted to increase by 45% in FY2023. Occupancy Tax revenues are based on the following assumptions:

- There is one new hotel scheduled to open in May of 2022. The property is a WoodSprings Suites and will cater primarily to extended stay guests.

- Occupancy Tax forecasting is based on factors including Smith Travel Research monthly forecasts which predict visitor travel within the Cabarrus County market. Additional information is obtained through information exchange with the lodging properties within Cabarrus County as well as an analysis of any citywide/countywide events.

- Actual occupancy performance for the second half of 2021 was used as a barometer to estimate occupancy tax revenue recovery from the pandemic.

- Leisure travel has driven the recovery in the short term since the beginning of the pandemic. Group and business travel are still lagging behind pre pandemic levels. We are hopeful that cancelled meetings and conventions will be able to reschedule their events in FY2023. Average Daily Rates on lodging properties have rebounded faster than economists were predicting.

- Occupancy Tax revenue received in July 2022 from June 2022 occupancy will be accrued back into June 2022 for FY2022 accrual statements. For this purpose, there will be zero revenue recognized in July 2022 while there will be 2 months recognized in June 2023.

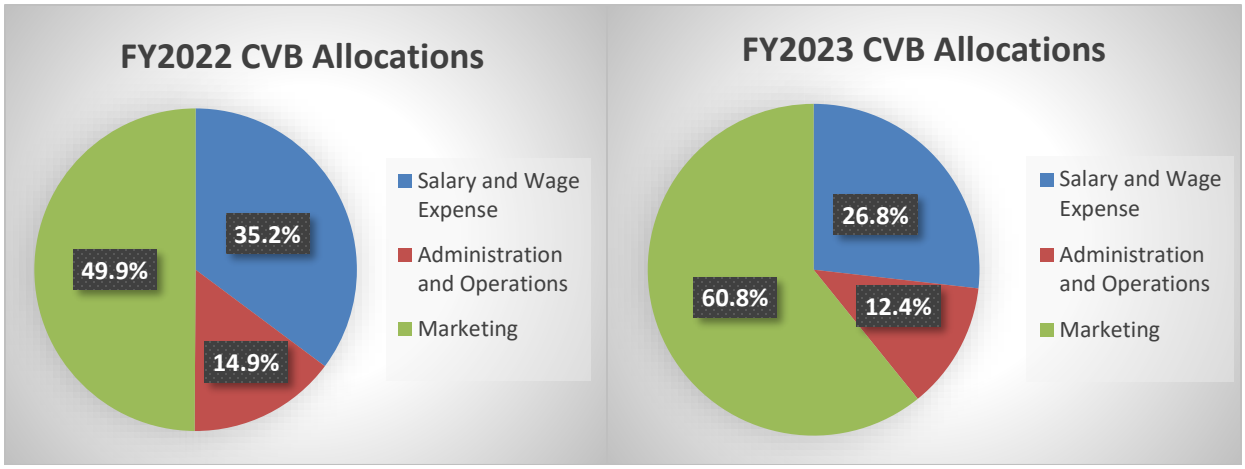
Other Revenue:

- Other revenue of $36,060 includes cooperative advertising opportunities, interest on cash deposits, Celebrate Cabarrus, and retail sales in the visitor center.

- The CCTA currently maintains the County approved reserve rate of 17% in its Fund Balance.

Expenditures:

The CVB operates on a zero-based budget; therefore, all revenues received in FY2023 are budgeted to be expended. Expenditures for the CVB are divided into three categories. They are Salary and Wage Expense, Administration and Operations, and Sales and Marketing Activities. The following charts illustrate how expenditures are budgeted in FY2023 compared to FY2022.



Salary and Wage Expense:

Actual FY2021	1,112,632
Budget FY2022	1,338,558
Budget FY2023	1,545,395

- The Bureau currently operates with 14 employees at 13 Full Time Equivalents (FTE's). There were 21 employees prior to the pandemic.
- The Bureau will be adding back positions that were lost during the pandemic. These positions include 1 full time and 1 part time Visitor Services team members and 1 full time Sales Manager.
- Salary and hourly labor costs include 3% merit increases based on performance.
- Medical insurance premiums are forecasted to increase by 10% in FY2023. Dental increases are forecasted at 5% while Life Insurance and Long-Term Disability are forecasted to increase by 15%. Mandatory Local Government Retirement funding by the CVB in FY2022 was 12.02% and is forecasted to be 13.58% in FY2023.

Administration and Operations:

Actual FY2021	543,125
Budget FY2022	582,719
Budget FY2023	714,253

- The Administration fee charged by the County for collecting the Occupancy tax will be 5%, the maximum amount that is legislated by the state. The Bureau is currently in a 10-year agreement with the County for another 5% for sports facility upgrades that will be recognized in the Sales and Marketing section of this budget.

- The CCTA office lease at 10099 Weddington Rd will remain unchanged in FY2023.

- New Lease accounting regulations were instituted according to GASB in FY2022 where leases are structured as use assets. Lease Payments are recognized in the budget as Debt Service – Lease and Principal.

Sales and Marketing:

Actual FY2021	986,114
Budget FY2022	2,052,286
Budget FY2023	3,506,412

Allocated Marketing Expenses:

- For FY2023 the CCTA budget has pre-allocated expenditures of $507,297 or 14.5% of the total Sales and Marketing expenses. These allocations include:
    1. Charlotte Motor Speedway agreement - $220,797
    2. Cabarrus County Sports Facility agreement - $286,500

Market Groups

The CCTA Marketing Activities are divided into three groups in addition to Media Relations, Web, Partnership, and Visitor Services.

1. Group – Includes Corporate, Sports, Associations, SMERF (Social, Military, Education, Religious, Fraternal) Group Tour, Group Destination Services
2. Leisure – Markets to the transient leisure traveler
3. Bureau – Includes non-specific market items such as Marketing Agreements, Destination Management, Research, and Organizational Dues.

Sales and Services Budget FY2022 $300,043 / FY2023 $500,000

Advertising

FY2022 – $26,650 FY2023 –$41,000

The FY23 advertising spend will be spent in the Sports, State Associations & Religious markets. All advertising dollars will be spent on proven industry web sites and on advertising in industry print publications. All advertising will be targeted to a rights holder and placed in specific time frames to increase destination exposure.

Business Development

FY2022 – $31,250 FY2023 - $34,350

The majority of this spend is on a yearly membership for Cvent. Cvent is a platform that 3rd party meeting planners (rights holders) can search to find destinations and hotels to host conventions/events. Dollars left over for research, product development and competition analyzation.

Collateral Production:

FY2022 - $5,250 FY2023 - $7,500

Collateral production expenses: ad creation & profile sheets to be given away at tradeshows.

Dues & Subscriptions:

FY2022 - $13,500 FY2023 - $15,650

Organization memberships include Association Executives of North Carolina and Meeting Planners International. Membership provides discounts to group sponsored tradeshows.

Familiarization/Site Inspections:

FY2022 - $28,500 FY2023 – $59,650

The group sales team will host familiarization tours and site inspections in FY2023 as the meetings industry is starting to see some recovery. These tours allow for continued relationship building while showcasing the destination.

Agreements/Bids:

FY2022 - $99,200 FY2023 - $184,200

Agreement expense is for sponsorships of confirmed groups in FY2023. There are groups that had to cancel in FY2021 & FY22 due to the pandemic. As groups are rebooking in FY2023 these dollars will help secure business for the destination. There is also a budget in place to handle in the year for the year booked opportunities.

Tradeshows:

FY2022 - $81,699 FY2022 - $93,450

Tradeshow expense includes registration and travel to regional and national industry tradeshows that offer opportunities to interact with potential clients. Tradeshows will be focused on the following market segments: Sports & State Association and 3rd Party Meeting Planners.

Destination Services:

FY2022 - $18,944 FY2023- $64,200

The Destination Services budget helps provides services to meeting planners and their attendees who book conventions and events in Cabarrus County. Services includes welcome amenities, recommendations for off property facilities, attractions, transportation and offering itinerary suggestions. Other services include housing system, VIP welcome gifts, attendance-boosting materials, and destination guides.

Leisure Marketing Budget FY2022 $891,095 / FY2023 $1,646,641

For FY2023, we will leverage insights gathered through data and analytics to help us optimize our targeting and audience segmentation as we roll out our new brand. Increasing overall spend comparable to 2019 numbers by $915,000 will allow us to leverage our asset library we have been building during FY2022. This will allow us to showcase and tell our destination story in media we have had to suspend over the last two years. The integrated plan will include traditional and digital advertising, video, public relations, social media, promotions, research, and other marketing activation strategies.

The strategy behind this approach is designed to increase awareness of the new Cabarrus County and drive traffic to visitcabarrus.com, which will help build the county's perception as an ideal place for families, motorsports enthusiasts and general travelers to visit, thereby increasing occupancy and spend within the county.

Agency Budget: FY2022 $697,411 / FY2023 $1,278,000

FY2022	FY2023
Agency Fee - $150,000	Agency Fee - $168,000
Paid Media - $547,411	Paid Media - $1,110,000
Total: $697,411	Total: $1,278,000

The agency will complement and collaborate with the in-house staff to optimize budgeted paid-media and expand where necessary. Approximately 77% of the leisure budget will be allocated to execute an integrated, awareness-generating marketing and communications plan including paid advertising, digital media, SEO, messaging and creative development, and public/media relations through ideation, implementation and continued monitoring and analysis.

Measurable Promotions & Activation:

As we move visitors through the travel funnel from awareness to consideration, we will design and execute promotions and in our target markets to inspire travel to Cabarrus County. We will host pop-up events and give away free tickets to different attractions in Cabarrus County, as well as activate online contests rewarding those who have planned and booked travel to Cabarrus County. These efforts will help us measure intent and visitation.

Media/Public Relations Budget: FY2022 $37,396 / FY2023 $105,071

Adjustments have been made to increase the spend by 181%, which will cover PR Agency fees in support of the annual PR communications/ marketing plan including but not limited to annual PR plan development, media pitching, and reporting. We will continue to focus and build upon the opportunities established in FY2022 on a local, regional, national, and international level. Activities, processes, and tools from the year prior that aid in reaching travel writers and engaging the local community in overall tourism awareness and its impact on our area will remain.

Public relations efforts will supplement paid media targeting in drive markets but will extend into national markets to maximize impressions and exposure during throughout the year. Pitching cadence will be frequent and strategically focused on top travel trends and events. We will continue to target media and markets for on-site television inclusion, similar to the programing we have had success with featuring Cabarrus County on local TV morning programming in FY2022.

Web Technology Budget: FY2022 $65,000 / FY2023 $74,700

Leisure site:
Site performance, analytics/ reporting, SEO monitoring and overall site maintenance to support the leisure website will remain our focus. An increase of 15% will allow us to develop and implement landing pages to provide content to elevate the user experience. Based on the monthly data and research from SEO monitoring and reporting, content will be refreshed frequently to help us maintain our page rankings.

- Content Updates/landing pages
- Barberstock
- Hosting & Maintenance
- Business Website hosting, Firefold, Firebase
- Simpleview API Forms & Listings maintenance
- CRM Tool
- Domain renewals/purchases

Partnership – FY2022 $80,400 / FY2023 $146,050

The Partnership department strives to ensure our hospitality stakeholders are given opportunities to interact with each other forming alliances and gaining resources to make the visitor experience exceptional and their organization successful. This year's budget will allow our partners stay on top of trends to navigate the ever-changing hospitality industry and to benchmark with other tourism professionals.

Educational and networking events are being reworked this year with more robust speakers along with destination immersive networking events called Destination Mystery Tours replacing the Fuse events.

Celebrate Cabarrus and National Travel & Tourism Week celebrations will be our signature events. The local high school tourism academies and culinary departments will be invited to attend and participate in both events to keep them engaged in tourism and fill the local pipeline with future professionals.

Local and regional industry events are back on the radar giving support to and offering opportunities to meet, network and benchmark with area tourism professionals.

Visitor Services –FY2022 $40,420 / FY2023 $83,950

The goal of Visitor Services is to create and enhance the experience for visitors who have chosen Cabarrus County as their destination, so they stay longer, come back, and tell everyone about their great experience. This is done through the Visitor Center that the CCTA operates and offsite events.

Visitor Services will continue to engage visitors using ad specialty items as giveaways in the Visitor Center as well as during events at the tracks, parades, and other local engagement opportunities.

Local and regional industry events are back on the radar giving support to and offering opportunities to meet, network and benchmark with area tourism professionals.

With the influx of new faces in hospitality, Destination Training is more critical than ever. They will be held quarterly and will give our partners an opportunity to get their folks immersed in Cabarrus County which enables them to talk about our area from an experience standpoint.

Staff education has been added back into this year's budget and will participate in a national educational event geared towards visitor center operations.

Bureau Budget – FY2022 $637,932 / FY2023 $950,000

- Pre-allocated agreements with the Charlotte Motor Speedway and Cabarrus County Sports Fund Development totaling $507,297 are budgeted in this category.

- Additional marketing agreements to be continued in FY2023 include Concord Mills Mall, Cabarrus Economic Development Corporation, and Cabarrus Arts Council.

- The Bureau will continue its efforts to utilize research as a basis for making sales and marketing decisions. In FY2022 a new research platform called Zartico was brought online to better measure trends in the visitor economy in Cabarrus County. This includes measuring geo location data and credit card spend on items such as lodging, food, and transportation. Additional insights allow the Bureau to see how visitors move around the destination at event times and to measure Visitor/Resident ratios at various points of interest around the County.

FY2023 Operating Budget

		JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	FY2023 Budget	FY2022 Budget	FY2023 Budget Difference	FY2021	FY2020	FY2019
REVENUE																			
4000	OCCUPANCY TAX	0	580,000	485,000	465,000	515,000	465,000	460,000	410,000	410,000	450,000	500,000	990,000	5,730,000	$ 3,950,003	$ 1,779,997	$ 3,748,424	$ 4,133,247	$ 5,711,875
4010	INTEREST ON INVESTMENTS	230	230	230	230	230	230	230	230	230	230	230	230	2,760	$ 2,760	$ -	$ 2,264	$ 3,490	$ 3,560
4020	ADVERTISING REVENUES	0	0	0	0	0	0	0	0	0	0	25,000	0	25,000	$ 15,000	$ 10,000		$ 2,662	$ 28,567
4030	MISC REVENUE	0	0	0	0	0	5,000	0	0	0	0	0	0	5,000	$ 2,500	$ 2,500		$ 6,346	$ 3,234
4040	FUND BALANCE APPROPRIATED	0	0	0	0	0	0	0	0	0	0	0	0	0	$ -	$ -		$ 22,861	$ 15,000
4060	ITEMS FOR RESALE	200	200	200	300	300	300	200	200	300	300	400	400	3,300	$ 3,300	$ -	$ 3,182	$ 12,487	$ 17,945
	TOTAL REVENUE	430	580,430	485,430	465,530	515,530	470,530	460,430	410,430	410,530	450,530	525,630	990,630	**5,766,060**	**$ 3,973,563**	**$ 1,792,497**	**$ 3,753,870**	**$ 4,181,093**	**$ 5,780,181**
OPERATING BUDGET:																			
SALARIES																			
5000	SALARIES	45,889	77,519	116,279	77,519	77,519	77,519	77,519	77,519	116,279	77,519	77,519	116,279	1,014,878	$ 837,552	$ 177,326	$ 718,186	$ 868,326	$ 885,295
5010	HOURLY LABOR	6,590	6,205	7,747	5,165	5,165	5,165	5,165	5,165	7,747	5,165	5,685	11,195	76,159	$ 112,061	$ (35,902)	$ 75,401	$ 196,369	$ 237,178
5020	FICA	3,227	5,260	7,690	5,126	5,126	5,126	5,126	5,126	7,690	5,126	5,260	7,845	67,728	$ 58,712	$ 9,016	$ 49,584	$ 64,710	$ 68,652
5030	MEDICARE	729	1,199	1,798	1,199	1,199	1,199	1,199	1,199	1,798	1,199	1,199	1,803	15,720	$ 13,715	$ 2,005	$ 11,656	$ 15,766	$ 16,270
5040	MEDICAL INSURANCE	12,240	12,240	12,240	12,240	13,444	13,444	13,444	13,444	13,444	13,444	13,444	13,444	156,512	$ 133,424	$ 23,088	$ 115,526	$ 178,756	$ 165,724
5050	RETIREMENT	10,843	10,843	16,264	10,843	10,843	10,843	10,843	10,843	16,264	10,843	10,843	10,843	140,958	$ 113,404	$ 27,554	$ 83,982	$ 99,637	$ 90,238
5060	WORKMENS COMP	2,600	0	200	0	0	0	0	0	0	0	0	0	2,800	$ 2,700	$ 100	$ 1,871	$ 2,496	$ 2,036
5070	DEFERRED 401K	3,992	3,992	3,992	5,988	3,992	3,992	3,992	3,992	3,992	3,992	5,992	3,992	51,900	$ 45,590	$ 6,310	$ 38,808	$ 53,848	$ 50,955
5080	PERFORMANCE INCENTIVES	0	0	0	0	0	0	0	0	0	0	0	15,000	15,000	$ 10,000	$ 5,000	$ 15,453	$ 13,061	$ 15,000
5090	UNEMPLOYMENT INSURANCE	150	100	150	150	100	100	900	700	900	300	40	150	3,740	$ 11,400	$ (7,660)	$ 2,165	$ 2,171	$ (280)
	TOTAL SALARY AND WAGES EXPENSE	86,260	117,358	166,360	118,230	117,388	117,388	118,188	117,988	168,114	117,588	119,982	180,551	**1,545,395**	**$ 1,338,558**	**$ 206,837**	**$ 1,112,632**	**$ 1,495,141**	**$ 1,531,068**
ADMINISTRATION & OPERATIONS																			
6000	ADMIN FEE	0	29,000	24,250	23,250	25,750	23,250	23,000	20,500	20,500	22,500	25,000	49,500	286,500	$ 197,500	$ 89,000	$ 187,421	$ 206,662	$ 285,594
6004	CAPITAL OUTLAY	0	0	0	0	0	0	0	0	0	0	0	0	0	$ -			$ 19,718	$ 18,357
6010	EMPLOYEE/COMMUNITY RELATIONS	200	300	300	300	300	1,200	800	300	400	300	300	300	5,000	$ 2,800	$ 2,200	$ 1,407	$ 6,522	$ 8,267
6020	INSURANCE	7,648	0	175	0	0	0	0	0	0	0	0	0	7,823	$ 6,875	$ 948	$ 6,825	$ 7,564	$ 7,406
6030	MILEAGE	50	50	50	50	50	50	50	50	50	50	50	50	600	$ 800	$ (200)	$ 29	$ 41	$ 718
6040	OFFICE EQUIPMENT/MNT	3,755	3,755	3,755	3,755	3,755	3,730	3,730	3,755	3,755	9,955	3,755	3,759	51,214	$ 69,152	$ (17,938)	$ 68,204	$ 60,719	$ 59,471
6050	OFFICE SUPPLIES	700	700	700	700	700	700	700	700	800	800	800	712	8,712	$ 7,600	$ 1,112	$ 3,690	$ 9,440	$ 12,958
6060	OTHER OPERATING COST	905	905	1,190	705	705	1,520	720	705	990	705	735	985	10,770	$ 6,830	$ 3,940	$ 4,006	$ 11,214	$ 10,169
6070	POSTAGE/SHIPPING	750	1,455	900	750	1,505	850	500	1,355	550	600	3,505	1,750	14,470	$ 13,266	$ 1,204	$ 5,164	$ 10,012	$ 19,183
6080	PROFESSIONAL SERVICES	0	5,000	8,800	2,150	0	5,175	0	200	500	0	0	500	22,325	$ 16,325	$ 6,000	$ 12,700	$ 14,225	$ 19,386
6090	RENT/BUILDING EXPENSE	2,975	2,920	4,292	3,045	2,890	4,462	3,445	3,290	4,462	2,945	2,890	6,462	44,078	$ 230,336	$ (186,258)	$ 224,710	$ 188,140	$ 172,921
6100	STAFF DEVELOPMENT	400	400	400	400	400	300	300	400	400	300	300	464	4,464	$ -	$ 4,464	$ 1,133	$ 553	$ 15,622
6110	TELEPHONE	2,600	2,000	3,200	2,000	2,000	2,420	2,000	2,000	4,920	2,000	2,000	2,420	29,560	$ 25,850	$ 3,710	$ 24,806	$ 26,726	$ 30,835
6120	VEHICLE EXPENSE	250	250	825	250	680	660	250	300	600	300	300	1,520	6,185	$ 5,385	$ 800	$ 3,030	$ 9,794	$ 12,823
6130	DEBT SERVICE - INTEREST	1,683	1,717	1,698	1,626	1,658	1,588	1,618	1,599	1,433	1,559	1,491	1,519	19,189	$ -	$ 19,189	$ -	$ -	$ -
6131	DEBT SERVICE - PRINCIPAL	16,863	16,829	16,848	16,920	16,888	16,958	16,927	16,947	17,113	16,987	17,055	17,027	203,363	$ -	$ 203,363	$ -	$ -	$ -
	TOTAL ADMIN & OPS	38,779	65,281	67,383	55,901	57,281	62,863	54,041	52,101	56,473	59,001	58,181	86,968	**714,253**	**$ 582,719**	**$ 131,534**	**$ 543,125**	**$ 571,332**	**$ 673,712**
SALES AND MARKETING ACTIVITIES																			
7000	ADVERTISING/E-MARKETING	152,350	120,330	141,975	168,180	111,500	128,155	109,000	125,330	127,850	128,830	109,000	116,941	1,539,441	$ 815,911	$ 723,530	$ 374,924	$ 998,573	$ 1,247,258
7015	BUSINESS DEVELOPMENT	30,850	4,450	6,650	80,250	1,150	5,250	9,000	22,750	6,200	3,250	1,250	11,400	182,450	$ 51,150	$ 131,300	$ 46,860	$ 62,881	$ 82,843
7020	COLLATERAL/PRODUCTION	19,000	8,800	25,250	4,000	16,300	7,750	4,000	24,800	78,500	5,500	7,800	6,000	207,700	$ 130,084	$ 77,616	$ 29,694	$ 95,747	$ 147,657
7030	CORPORATE COMMUNICATIONS	1,400	0	400	3,500	400	400	2,400	400	400	400	400	400	10,500	$ 10,400	$ 100	$ 5,039	$ 8,866	$ 10,594
7040	DUES & SUBSCRIPTIONS	32,160	1,410	250	190	7,000	3,600	4,640	45	2,900	295	0	700	53,190	$ 43,380	$ 9,810	$ 39,549	$ 46,021	$ 51,225
7060	EVENT EXPENSE	0	0	7,250	20,000	17,500	2,250	0	0	2,250	0	17,500	22,250	89,000	$ 54,705	$ 34,295	$ 18,305	$ 98,447	$ 189,371
7070	FAM TOURS/SITE INSPECTIONS	0	0	15,000	6,200	5,000	0	0	0	5,000	10,000	18,450	0	59,650	$ 28,500	$ 31,150	$ 6,724	$ 26,009	$ 67,822
7120	MEDIA RELATIONS	17,716	7,225	7,225	12,540	7,220	6,900	7,725	6,225	7,225	11,620	6,425	7,025	105,071	$ 37,396	$ 67,675	$ 7,485	$ 20,883	$ 42,400
7125	PARTNERSHIP	9,625	4,525	4,625	5,525	45,475	1,725	17,525	5,525	2,925	14,125	29,525	4,925	146,050	$ 80,400	$ 65,650	$ 6,847	$ 86,279	$ 117,423
7130	AGREEMENTS/BID FEES	65,625	65,525	67,375	61,875	70,575	36,750	57,035	54,535	54,435	55,535	90,435	91,800	771,500	$ 576,972	$ 194,528	$ 377,994	$ 676,457	$ 992,719
7140	TRADE SHOWS/CONFERENCES	26,550	14,550	7,425	8,300	11,200	4,400	6,200	8,150	6,000	8,700	5,785	11,750	119,010	$ 99,024	$ 19,986	$ 8,875	$ 118,282	$ 169,369
7150	WEB TECHNOLOGY	5,178	1,738	8,589	1,738	11,138	8,589	2,338	14,738	8,589	1,738	1,738	8,589	74,700	$ 65,000	$ 9,700	$ 44,117	$ 49,008	$ 59,991
7160	DESTINATION SERVICES	1,995	31,020	18,570	10,945	13,170	9,080	8,045	6,370	15,020	14,045	3,120	16,770	148,150	$ 59,364	$ 88,786	$ 19,701	$ 103,530	$ 162,810
	TOTAL MARKETING	362,449	259,573	310,584	383,243	317,628	214,849	227,908	268,868	317,294	254,038	291,428	298,550	**3,506,412**	**$ 2,052,286**	**$ 1,454,126**	**$ 986,114**	**$ 2,390,983**	**$ 3,341,481**
	GRAND TOTAL EXPENSES	487,488	442,212	544,327	557,374	492,297	395,100	400,137	438,957	541,881	430,627	469,591	566,069	**5,766,060**	**$ 3,973,563**	**$ 1,792,497**	**$ 2,641,871**	**$ 4,457,456**	**$ 5,546,261**
	REVENUES OVER EXPENDITURES	-487,058	138,218	-58,897	-91,844	23,233	75,430	60,293	-28,527	-131,351	19,903	56,039	424,561	**0**	**$ -**	**$ (0)**	**$ 1,111,999**	**$ (276,363)**	**$ 233,919**

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Cabarrus Regional Chamber of Commerce - Funding for Edge Factor

BRIEF SUMMARY:
Edge Factor is a digital learning platform for Career Exploration, Planning and Connection for Cabarrus County Students and Adults with Local Businesses. It offers online curriculum, instruction, and videos for students of all ages to learn about available careers, education or credentials/certifications needed to attain them and local companies that hire for those particular careers, effectively connecting learners of all ages with the local companies trying to fill talent pipelines.

REQUESTED ACTION:
Motion to approve funding the Edge Factor platform for three years for Cabarrus County that would include curriculum access for all Cabarrus County Schools, Kannapolis City Schools students, as well as community access for basic information and authorize the Budget Director to prepare the necessary budget amendment.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Barbi Jones, Executive Director, The Chamber Leading Business in Cabarrus
Larissa Hoffman, Edge Factor

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:

- Edge Factor Overviews
- Letters of Support from Cabarrus County Schools, Kannapolis City Schools, Rowan-Cabarrus Community College and Centralina Workforce Development Board

Memo to: Cabarrus County Commissioners, Mike Downs, Rodney Harris

From: Barbi Jones, Executive Director, The Chamber, Leading Business in Cabarrus

RE: Edge Factor: Digital Learning Platform for Career Discovery, Exploration and Preparation

For several years, The Chamber has been researching digital platforms that schools, students, and adult learners could access to learn about careers available in Cabarrus County, the pathways to attain those careers, and a way for businesses to connect with learners to fill talent pipelines from our local learners.

In working with other chambers across the state, we discovered Edge Factor, a platform that provided all the above and more.

It provides a "K to Gray" curriculum reach that has age-appropriate career learning options, including lesson plans and videos for teachers, as well as options for students to work independently. Parents could have their own account to track their students' progress, as well as access information for themselves as potential adult learners.

With Edge Factor, we would be able to select the major industries in Cabarrus County and identify the jobs and career pathways within each of those. We would have access to virtual field trips that students can take to discover what it is like doing the various jobs in those industries. Additionally, all interested businesses in Cabarrus County could have a free profile on the community page to introduce their business, the careers available there and a connection to their website and job listings.

Why is this important?

Businesses of all sizes struggle to find skilled workers to fill current and future job vacancies. As we continue to recruit companies offering high-paying wages, we need to invest in our future workforce to ensure they are aware of the many options they have available to them when they graduate from high school and can identify the postsecondary educational attainment needed to secure those jobs. A recent study found 70% of North Carolina jobs will require some postsecondary educational attainment by 2030. This could be an industry-recognized credential or certification, a two-year degree or four-year degree.

We know that it is important to expose students to careers in elementary school, so they become aware of what is available. In middle school, we can start identifying what they like to do and match those interests to potential career pathways. Our high schools offer excellent Career Technical Education programs and academies, so if students in middle school are interested in one of those areas, we can direct those students to the appropriate academies where they will build the foundations needed for those careers. Edge Factor has the tools to do this.

Often, students are only familiar with the careers they see in their everyday environments. If exposed to other careers, the door is open to learn more and create a true pathway to that interested industry for them. This is especially true in low-income areas where we know education is the best tool to break the cycle of poverty.

Career exploration is an excellent tool for teachers to demonstrate how skills learned in school translate to solve "real world" problems. So, for the students who struggle with STEM subjects, their teachers can show them how those theories are used in jobs every day.

While businesses would love to be more involved with local schools and students, OSHA regulations restrict those under 18 from being on many worksites, so it's difficult for students to see firsthand the work that's available to them. Also, time is indeed money for many businesses, and it's difficult for them to leave their workplace to attend career days and events in schools. Virtual would never totally replace in-person, but it gives students a true real-life tour of what each industry does and the many varied jobs within them.

I have worked with Edge Factor to negotiate a rate of $31,500/year for three years; that is discounted by 80%. This includes the community page that would be administered by The Chamber. The investment covers membership for each CCS and KCS student and educator, and every business in Cabarrus County would have the opportunity to post their profile, including links to websites and job postings at no cost. Additionally, the community page would be open to anyone who wanted to access it to learn more about jobs in Cabarrus County.

Because of the analytics built into the platform, we can monitor the aggregate and more granular usage to track progress. It is our hope that it would be a tool widely used, and after three years, our businesses could support the platform annually.

Catherine Truitt, North Carolina Superintendent of Public Instruction, declared 2022 as "The Year of the Workforce" and has encouraged schools to invest in "the preparation for the postsecondary plans of their choice so that they can be a functioning member of the workforce." We see Edge Factor as a great tool for Cabarrus County to invest in to move the needle on employability and preparation for our students.

So in closing, I would like to respectfully request $94,500 for a three-year subscription to Edge Factor for Cabarrus County and Kannapolis City Schools and the community page for The Chamber to help our local businesses connect to current and future employees and keep our students and talent in our community to pursue family-sustaining jobs.

Thank you for your consideration.

Edge Factor provides tangible solutions to Workforce Development challenges.

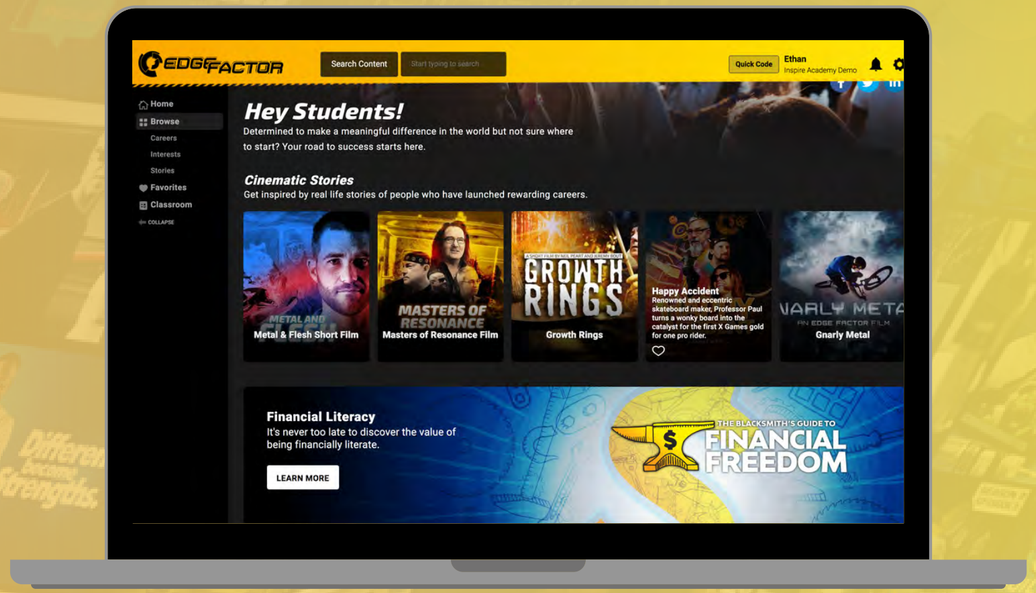
We guide students and job-seekers to explore opportunities and discover local training and career pathways through videos, lesson plans, interactive activities, and more.

Our goal is to take people on a Career Journey from "*I have no idea what to do with my life!*" all the way to, *"I have browsed the opportunities, made informed decisions, and successfully launched a local training and career pathway!"*

edgefactor.com

Edge Factor equips organizations and communities with access to thousands of story-driven e-learning and career exploration tools.

Our tools are used in classrooms, at events, and in homes across North America, delivered through the online Edge Factor platform.



Click here to explore the platform!

All of the tools and features we create are designed to be modular and age-appropriate.

Today, Edge Factor delivers content for grades 5-12+ and job-seekers. From January - July 2022, our Team is developing, filming, and publishing content for Kindergarten- grade 4!

This means our library will soon offer career exploration tools that intersect every age group - we call this our "K-Grey" strategy.



Educators, students, families, companies, workforce leaders, and service providers login to their customized Edge Factor Premium Memberships to watch and share e-learning and career exploration tools.

Focusing on helping students and job-seekers go on a Career Journey, we categorize all of our content into the four phases:

INSPIRATION
CINEMATIC STORIES INSPIRE CAREER EXPLORATION

EXPLORATION
EXPLORE DIVERSE CAREER PATHWAYS

PREPARATION
STEAM, SOFT SKILLS, CTE/SHSM

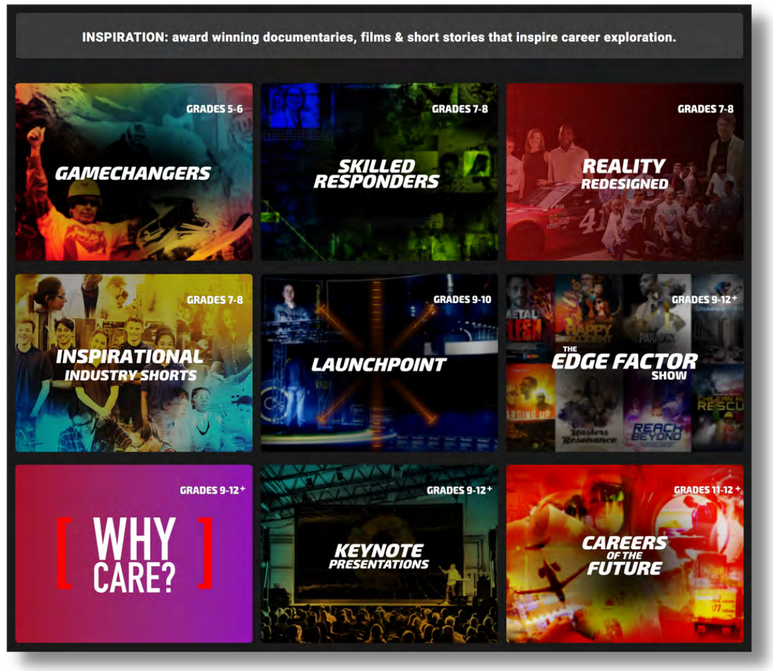
CONNECTION
COMPANIES, CAREERS, SCHOOLS, TRAINING PROGRAMS

Under the "Connection" phase, K-12 and Postsecondary Schools, Companies, and Service Providers **unite to showcase local opportunities,** as they add Profiles with info on what they do, their website, images, optional video, logo, and more.

INSPIRATION

CINEMATIC STORIES INSPIRE CAREER EXPLORATION

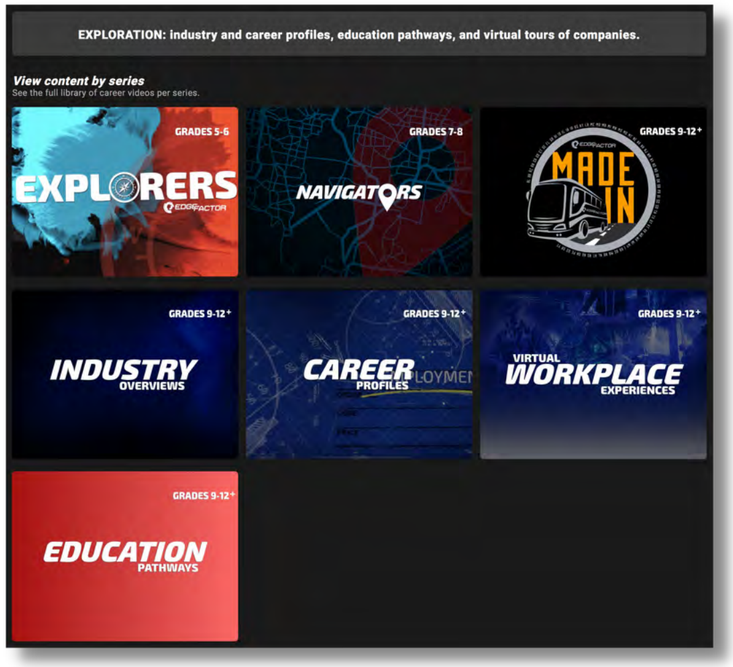
Inspiration is all about helping students and job-seekers get EXCITED about their future, using the power of storytelling to open their eyes! Edge Factor creates award winning films, short stories and documentaries that showcase teams of people working together to impact the world.



EXPLORATION

EXPLORE DIVERSE CAREER PATHWAYS

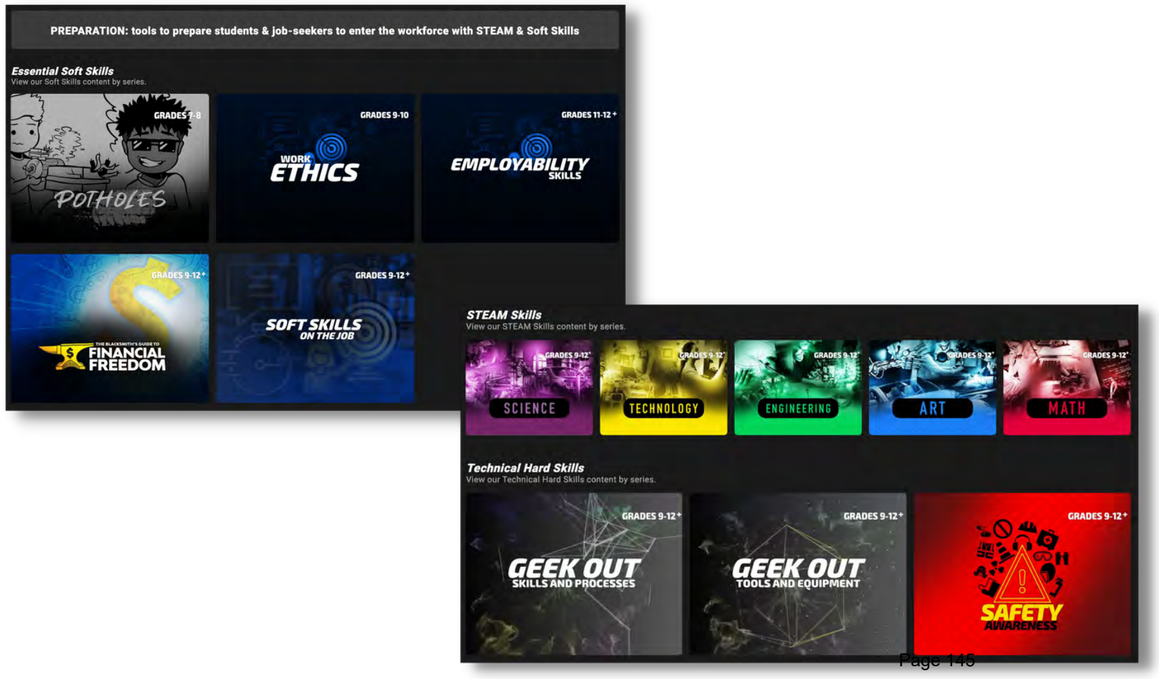
Students and job-seekers dig deeper to explore what it's like to work in diverse industries and careers. The Exploration content we create includes Industry Overviews, 400+ Career Profile videos, 200+ Virtual Workplace Experiences featuring walk-and-talk tours in companies, and much more.



PREPARATION

STEAM, SOFT SKILLS, CTE/SHSM

The purpose of Edge Factor's Preparation content is to help students and job-seekers *prepare* for future success - at work and in life! We have videos, lesson plans, and assignable activities that teach students about Soft Skills, Financial Literacy, and how Science, Technology, Engineering, Art, and Math (STEAM) come alive in real world careers.

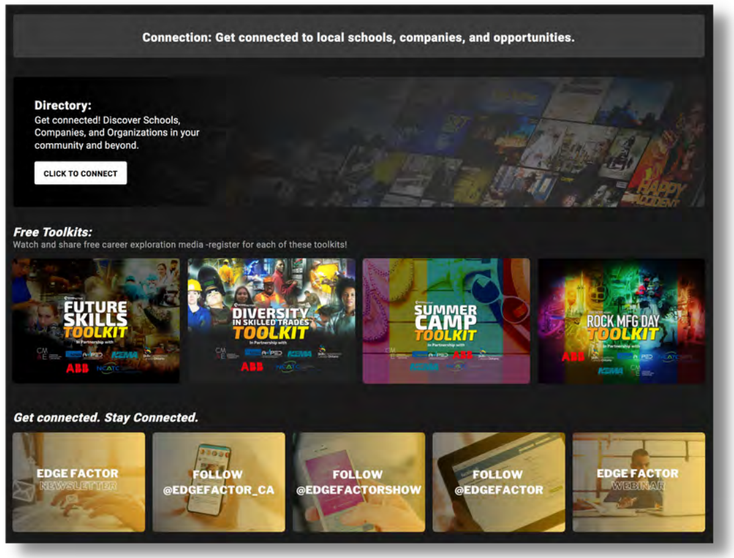


CONNECTION

COMPANIES, CAREERS, SCHOOLS, TRAINING PROGRAMS

Connection is all about helping students and job-seekers *connect* to local training and career opportunities. Edge Factor's Directory is a great tool for students and parents to browse local Schools, Training Programs, Companies, and Careers: edgefactor.com/Directory

We provide 4 free toolkits every year to help build local relationships and share free media too!



Premium Edge Factor Memberships for K-12 Schools include:

- **Equitable access** to thousands of Learning Objects including high impact videos, event toolkits, lesson plans, interactive activities, and a Virtual Reality app!
- You can **login to the Edge Factor platform on any wifi connected device.**

- **Diversity:** Representation matters. We care deeply about featuring stories of individuals from diverse ethnic backgrounds, and perspectives. We are dedicated to intentionally featuring diverse people and underserved community members.

- Unlimited number of educators and students from the school can login.
- Unlimited number of Classes and Assignments.
  - Ability to play and/or assign videos and quizzes for students to complete.

- **School and Program Profiles** provide tools to raise awareness of your programs!

- Edge Factor media and tools are aligned to **provincial curriculums** to make it as easy as possible for educators to understand when and how to use them.

- **Real-time Analytics** help Administrators monitor users and usage.
- **Support**: Training Webinars, Help Desk, Live Chat, Phone and Email Support.
- **Communications:** Blog, Newsletters, Webinars, and Social Media updates.



2022 FREE Toolkits

In 2022, Edge Factor is providing free event toolkits to inspire students and job-seekers to launch career pathways! Each toolkit is available for free during specific months of the year. Each toolkit includes high impact career exploration and e-learning media from Edge Factor's library, practical "How To Guides" for hosting events, and sponsor profiles. These turnkey toolkits provide everything Associations, Companies, Schools, Families, Workforce and Community leaders need to host an engaging career event - live or virtual!

January - February 2022:



As students are choosing which programs to enrol in for the following year, Edge Factor's Future Skills toolkit will promote and celebrate technical education programs and encourage students to get involved in the skilled trades!

March - May 2022:



This toolkit is all about showcasing diverse people in diverse careers in the skilled trades. Coinciding with awareness days like March's International Women's Day and April's "Celebrate Diversity" month, this toolkit will provide a ton of content for your organization and network to celebrate real life men and women who have launched rewarding career pathways.

June - August 2022:



Summer Learning Programs and Summer Camps are in need of turnkey tools to engage students! This toolkit shows how Science, Technology, Engineering, Art, and Math all come alive in real world careers! Perfect for summer camps or family activities.

September - November 2022:



October is Manufacturing Day/ Month and Edge Factor is providing the 2022 Rock MFG DAY kit for everyone to highlight the extraordinary world of advanced manufacturing. This toolkit includes resources to promote manufacturing careers and technology and showcase how STEAM comes alive in this industry.

When EDGEFACTOR is plugged into your community...

EDUCATORS are equipped with plug-and-play e-learning and career exploration tools to share with students and families in classrooms, homes, and at events!

STUDENTS AND JOB-SEEKERS discover industries, careers, training programs, learn how STEAM (*Science*, *Technology*, *Engineering*, *Art*, *and Math*) and Soft Skills come alive in the real world, and explore local schools and companies.



COMMUNITY AND WORKFORCE LEADERS share Labor Market Information and build local relationships between families, companies, and schools.

PARENTS have tools to help their kids explore their interests and become informed of modern opportunities.

COMPANIES are paired with recruitment tools to promote who they are and the training and career opportunities they offer. Learn how: offers.edgefactor.com/companies

Connect with us!

We'd love to provide a live Edge Factor demo, receive your feedback, answer questions, and explore opportunities to partner together. Feel free to reach out anytime. Thank you!

Larissa Hofman, Vice President - Edge Factor

E: LHofman@edgefactor.com | Cell: (905) 466-5330

Cabarrus County Schools
Engaging minds. Shaping futures.

4401 Old Airport Road
PO Box 388
Concord NC 28026-0388

704-260-5611
704-262-6175 fax

April 13, 2022

Barbi Jones, Executive Director
Cabarrus Regional Chamber of Commerce
57 Union Street, South
Concord, N.C. 28025

Dear Barbi,

In Cabarrus County Schools, we appreciate the years of support shown to our students and staff by the Cabarrus Regional Chamber and the Cabarrus County Commissioners. We appreciate the partnership we have with both organizations. We also are very excited to hear about the opportunity to use Edge Factor as an instructional tool for our students. Please consider this letter as our support for the purchase of Edge Factor through the Chamber's request for funding.

Part of the Cabarrus County Schools Strategic Plan includes directives to help all students find their career path. The Chamber's plan to provide Edge Factor is aligned with that strategic plan, which focuses on developing well-educated, productive citizens for Cabarrus County.

As an effort to incorporate the use of Edge Factor into our instructional culture, our Academic Services team is already working to develop training for teachers. The professional development plan includes helping teachers target specific objectives in their curriculum where Edge Factor can be used. With there being so many options for how to use Edge Factor, our goal is to first share the product with teachers, who then would plan, as a team, where Edge Factor can be included in daily lessons.

Again, we appreciate your support for the students in Cabarrus County Schools. We look forward to continued conversations about Edge Factor.

Stay well,

John J. Kopicki

Dr. John J. Kopicki
Superintendent
Cabarrus County Schools

Kannapolis City Schools
100 Denver Street
Kannapolis, NC 28083

704-938-1131 **FAX: 704-933-6370**

http:/www.kannapolis.k12.nc.us

Kevin Garay
Superintendent
kevin.garay@kcs.k12.nc.us

April 13, 2022

Mrs. Barbi Jones
Executive Director
The Chamber, Leading Business in Cabarrus

Barbi,

Please accept this letter as a conveyance of enthusiastic support for The Chamber's pursuit of Cabarrus County Commissioner funding for Edge Factor. In Kannapolis City Schools (KCS), we are confident that Edge Factor will positively impact all stakeholders in our school district. Moreover, we fully understand the greater potential impact, beyond KCS, for Cabarrus County. This certainly includes Cabarrus County Schools, Rowan-Cabarrus Community College, The Chamber, and essentially, all institutions focused on preparing students (both traditional and non-traditional) for the workforce in Cabarrus County. Further, this also includes all businesses who will benefit from the accentuation of workforce preparation that Edge Factor provides.

In KCS, Edge Factor will serve a critical role in the inspiration, exploration, preparation and connection for our students as they are afforded an opportunity to engage with the platform. Students will have access to tools that allow them to become more motivated about a particular career field, and to explore the specifics of an industry, career or training program. Further, and perhaps most importantly, students will be able to better chart their path of preparation. This benefit is more than selecting appropriate middle school or high school courses. It is more than focusing on a potential college program of interest. It is about gaining transferable technical and soft skills that prepare students for a variety of options as high school students (e.g., internships) and certainly as they enter the workforce. Additionally, Edge Factor permits students to connect with companies, careers, schools and training programs well before their last years of high school; and, the emphasis is on local companies, careers, schools and training programs. Tangible, practical connections to people, programs and industries is an enormous asset for our stakeholders and our business community. Edge Factor not only provides a strong foundation for this, it will give Cabarrus County a distinct advantage in keeping our inspired, well-researched, and well-prepared students connected to our business community.

We are fully committed to continuing our support for multiple measures of student success in KCS. This goal is a cornerstone of our district and much of this work is accomplished through our focus on career exploration, preparation and connection. Edge Factor will make a difference in all aspects of this work for KCS and all of Cabarrus County. We fully support The Chamber's goal in this endeavor and greatly appreciate the opportunity to collaborator in this effort.

Sincerely,

Kevin Garay

Rowan-Cabarrus COMMUNITY COLLEGE

April 13, 2022

Steve Morris, Chair
57 Union Street South
Concord, NC 28025

Dear Cabarrus County Board of Commissioners:

I am writing in support of the College's partnership with the Cabarrus County Chamber of Commerce (The Chamber) to provide, Edge Factor, a digital platform to help address educational attainment, career development, and workforce development needs in our county. The College's student success leaders and career/academic advisors have vetted the Edge Factor platform and find it to be a tool that will allow for an orchestrated connection between local businesses, school systems, the community college, and adult learners.

Research shows that by 2030, 70% of jobs will require more than a high school diploma. Edge Factor will link our community to true career pathways, many of which can be attained through the postsecondary credentials or degrees offered by Rowan-Cabarrus Community College. Leveraging Edge Factor's ability to allow for the school system and adult learner access, we commit to creating profile pages to showcase the College's website, academic program videos, internships, and college readiness programs for high school students, their parents, and interested adult learners.

I firmly believe that education is the best investment anyone can make. Rowan-Cabarrus, the local school systems, and The Chamber need your support to build a better tomorrow for our students and community. This partnership is proof that we can strengthen the region by providing high-tech, highly collaborative and flexible ways to prepare our students for sustainable careers. Encouraging students to learn and aspire to work and live locally is important to us. Alongside our outstanding career and technical education partners in Cabarrus County Schools and Kannapolis City Schools, we appreciate The Chamber's mission to connect, convene and champion this important effort.

Sincerely,

Carol S. Spalding

Carol S. Spalding, Ed.D.
President, Rowan-Cabarrus Community College

CENTRALINA Workforce Development Board

9815 David Taylor Drive, Suite 100
Charlotte, North Carolina 28262
(704) 348-2717 Fax: (704) 899-5624
E-Mail: dhollars@centralina.org
www.centralinaworks.com

May 19, 2022

Mr. Steve Morris, Chair
Cabarrus County Commission
57 Union Street South
Concord, NC 28025

RE: Support for EDGE Factor in Cabarrus County

Dear Mr. Morris:

The Centralina Workforce Development Board (WDB) fully supports the Cabarrus County Chamber of Commerce (The Chamber) partnership effort to provide EDGE Factor, a digital platform to address educational attainment, career development, and workforce development needs in Cabarrus County. The Centralina WDB has successfully worked with local partners in Lincoln and Iredell counties to ensure the implementation of the EDGE Factor and we have seen the positive results for students and career seekers in those counties. EDGE Factor is a vital tool in connecting career seekers, local businesses, workforce development, education, and economic development systems.

Since the majority of jobs in the near future will require more than a high school diploma, EDGE Factor will link Cabarrus County to true career pathways, many of which can be obtained through Rowan-Cabarrus Community College and with funding through Centralina WDB services delivered at our NCWorks Career Center in Concord. Having the EDGE Factor available for both student and adult access, the Centralina WDB can commit to creating profile pages to showcase the Centralina WDB website, have a separate heading page on the NC Centralina App for EDGE Factor Cabarrus, and links to all Centralina WDB and NCWorks/NextGen services.

The Centralina WDB believes that your support for the EDGE Factor and our partnership with The Chamber will allow us to bring the knowledge of great careers, training, and employers in Cabarrus County to more students and adult career seekers. Along with our great education partners in the county, we support The Chamber's mission to connect, convene, and champion this important effort. If you have any questions, please contact me directly.

Sincerely,

David Hollars, Executive Director
Centralina Workforce Development Board

NC works

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
County Manager - Adoption of the New Retention and Disposition Schedule for North Carolina

BRIEF SUMMARY:
Local government agencies in North Carolina include municipalities, counties, and regional entities. These organizations, along with any entities with whom they contract to perform the public business, are subject to the requirements of North Carolina's Public Records Act (G.S. 132). The retention and disposition schedules that follow are the tools created by the Government Records Section to assist employees of local government agencies in managing the records in their offices. These schedules list records series commonly found in local government offices, provide an assessment of their value, and indicate when (and if) these records should be destroyed.

These schedules are an agreement between the local government agencies and the Department of Natural and Cultural Resources (DNCR), serving as the inventory and schedule that DNCR is directed to provide by G.S. 121-5(c) and G.S. 132-8. Beginning in 2019, the Government Records Section excised common records standards, such as Legal and Personnel, from the individual retention and disposition schedules and combined them into the General Records Schedule for Local Government Agencies. All local government agencies should use the General Records Schedule for Local Government Agencies alongside the program schedule that covers the specific work assigned to your office.

These schedules must be approved by the local governing board before they can be used to authorize the destruction of public records.

REQUESTED ACTION:
Motion to approve the Record Retention and Disposition Schedule.

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.

ATTACHMENTS:

- General Records
- Program Records

RECORDS RETENTION AND DISPOSITION SCHEDULE

GENERAL RECORDS SCHEDULE:
LOCAL GOVERNMENT AGENCIES

Issued By:

NC DEPARTMENT OF
NATURAL AND CULTURAL RESOURCES

North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

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2021 General Records Schedule:
Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 *General Records Schedule: Local Government Agencies***:

1. Administration and Management Records
2. Budget, Fiscal, and Payroll Records
3. Geographic Information System Records
4. Human Resources Records
5. Information Technology Records
6. Legal Records
7. Public Relations Records
8. Risk Management Records
9. Workforce Development Records

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

G.S. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

"(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means."

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, G.S. § 132-6.1(a) specifies:

> "Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software."

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when "*reference value ends."* All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction *"destroy when reference value ends."* If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction *"destroy when reference value ends."*

Record Copy

A record copy is defined as "The single copy of a document, often the original, that is designated as the official copy for reference and preservation."[1] The record copy is the one whose retention and disposition is mandated by this schedule; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to

[1] Society of American Archivists, *Dictionary of Archives Terminology*.

designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as "record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use."[2]

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, "while you were out" slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.

Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary's seal), they must be retained according to the disposition instructions for the records series encompassing the forms' function.

[2] Ibid.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. This schedule supersedes previous versions of this schedule and any localized amendments; it is to remain in effect from the date of approval until it is reviewed and updated.

APPROVAL RECOMMENDED

Municipal/County Clerk or Manager
Title: _____

Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: _____

D. Reid Wilson, Secretary
Department of Natural and Cultural Resources

Municipality/County: _____

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the Local Agency Program Retention and Disposition Schedules. See the appendix for Related Records Series Found in Local Agency Program Schedules.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.

- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.

 – symbol designating that one or more records in this series may be confidential or may include confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – "a group of similar records that are . . . related as the result of being created, received, or used in the same activity." (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated.
See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS

Official records pertaining to the authority, operating philosophy, methods, primary functions, and routine office administration of local agencies.

ITEM #	*STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.01	**ABSTRACTS OF MUNICIPAL ELECTIONS** Copies of abstracts prepared by the County Board of Elections and forwarded to the municipal clerk.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____ *Retention Note: Official record maintained permanently by the County Board of Elections.*	Authority: G.S. 163-300
1.02	**ACCREDITATION RECORDS** Records documenting accreditations and certifications received by the agency. Includes applications, final reports, and other related records. Also includes evaluations of the agency by outside entities.	Destroy in office 5 years after superseded or obsolete.	Authority: 10A NCAC 48B
1.03	**ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES** @ Records documenting requirements or directives promulgated by the agency for the conduct of a business or activity on agency premises or under agency authority.	Destroy in office when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.04	**AUDITS: PERFORMANCE** @ Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records. SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Retain in office permanently reports related to internal compliance or operational audits, hazardous material, or those that document a significant change in agency practices. b) Destroy in office PCI attestation reports after 3 years. c) Destroy in office remaining audit reports after 10 years. d) Destroy in office documentation of corrective measures 2 years after their implementation. e) Destroy in office working papers and remaining records when superseded or obsolete.	
1.05 	**BLUEPRINTS AND SPECIFICATIONS** @ Blueprints and specifications of agency owned buildings and facilities. Includes as-built plans and related records concerning approved changes.	a) Transfer as-built drawings to new owner when agency relinquishes ownership of building or facility. b) Retain in office as-built drawings for life of structure and then destroy. c) Destroy in office blueprints, floorplans, and other preliminary design and construction documents when superseded or obsolete.	Confidentiality: G.S. 132-1.7

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.06	**BONDS** Records documenting written guarantees from a third party, including bid bonds, payment bonds, performance bonds, and surety bonds. SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), and Projects (below).	Destroy in office 5 years after expiration or cancellation.	
1.07	**BULLETINS** Internal information sharing materials that circulate information within the agency. Also includes memoranda and newsletters.	Destroy in office when superseded or obsolete.	
1.08	**BUSINESS CERTIFICATION RECORDS** Applications and supporting documentation submitted by businesses to be certified as a Small Business Enterprise (SBE) or other classification.	a) Destroy in office all documentation 3 years after most recent recertification. b) If certification was never issued, destroy in office all documentation when reference value ends.± Agency Policy: Destroy in office after _____	
1.09	**BUSINESS DEVELOPMENT SUBJECT FILE**	Destroy in office after 3 years.	
1.10	**CALENDARS OF EVENTS AND APPOINTMENTS**	Destroy in office when superseded or obsolete.	
1.11	**CENSUS PROJECT RECORDS** Records created to assist the U.S. Census Bureau with the decennial census.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.12	**CHARTER RECORDS** Charter and charter proceedings related to adoption, amendment and/or repeal.	Retain in office permanently.	
1.13	**COLLECTED DATA** Information and statistics compiled and analyzed for research purposes or to support the functions of the agency. SEE ALSO: Data Warehouses (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	Destroy in office when superseded or obsolete.	If data contains confidential information, abide by relevant restrictions.

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.14	**CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS** @ Records concerning objections, dissatisfaction, or disagreements with actions or positions taken or not taken by the agency. Includes comments and petitions submitted by constituents requesting action as well as routine requests for service. Also includes requests for reasonable accommodation to the general public under Title II of the Americans with Disabilities Act, Housing and Urban Development Act, 1973 Rehabilitation Act, and Title VII of the Civil Rights Act of 1964; including constituent requests, survey of agency buildings to determine accessibility to the physically handicapped, proposals for implementation, correspondence (including e-mail), and resolutions. SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS).	a) Transfer records as applicable to Litigation Case Records (STANDARD 6: LEGAL RECORDS). b) Destroy in office comments, complaints, petitions, and requests 1 year after resolution.* c) Destroy in office accommodation requests 2 years after resolution.*	Authority: 42 USC 12132
1.15	**CONSTITUENT SURVEYS** Surveys and related records addressing agency services, policies, and other concerns.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.16	**CORRESPONDENCE AND MEMORANDA** Administrative and management correspondence/memoranda (including e-mail) written or received by the office concerning agency authority, operating philosophy, purpose, methods, and any other function. For information on handling e-mail and text or instant messages, see **ELECTRONIC RECORDS**, page A-11. SEE ALSO: Public Bodies: Correspondence (below) and Legal Correspondence (STANDARD 6: LEGAL RECORDS).	a) Transfer correspondence (including e-mail) with historical value to History Records (below), after 3 years. b) Destroy routine administrative correspondence and memoranda after 1 year. c) Destroy in office remaining records after 3 years. *Retention Note: The correspondence (including e-mail) of the most senior administrator has historical value and should be retained permanently.*	
1.17	**CUSTOMER CALL CENTER RECORDINGS** @ Recordings of calls to customer service centers made for quality assurance and training purposes.	Destroy in office after 30 days.	
1.18	**EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS** @ Records concerning the maintenance, repair, routine testing, and inspection of agency owned equipment and vehicles. Also includes warranties. SEE ALSO: Grants (below), and System Maintenance Records: Hardware Repair or Service (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Destroy in office records documenting routine inspections, janitorial cleaning, and routine maintenance of equipment and vehicles after 1 year.* b) Destroy in office records documenting all other maintenance and repairs after 3 years.* c) Destroy in office warranties 1 year after expiration.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.19	**EQUIPMENT AND VEHICLE REFERENCE RECORDS** Includes operation, specification, and technical manuals. Also includes brochures, bulletins, and related documentation.	Destroy in office when superseded or obsolete.	
1.20	**EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS** Records documenting the assignment, request, and usage of agency assets. Also includes mileage and checkout logs, fuel consumption reports, reservation requests, authorizations, utility usage logs, and similar records.	a) Destroy in office after 3 years if records are used for allocating costs or determining payment under rental or lease agreements.* b) Destroy in office remaining records after 1 year.	
1.21	**FACILITY MAINTENANCE, REPAIR, AND INSPECTION RECORDS** Records documenting maintenance, repair, and inspection of agency-owned facilities, including warranties on said repairs. Also includes any real property owned by the agency. SEE ALSO: Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS), Property Management Records (below).	a) Destroy in office records documenting system repair and improvement (including plumbing, electrical, fire, and other systems) after 3 years. b) Destroy in office records documenting routine inspections, janitorial cleaning, environmental monitoring, and routine maintenance of facilities after 1 year. c) Destroy in office warranties 1 year after expiration.	
1.22	**FORMS AND TEMPLATES** Blank forms, templates, and letterhead used to create agency records.	Destroy in office when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.23	**GRANT PROPOSALS** Proposals submitted for grants, including applications, correspondence (including e-mail), and other related records.	a) Transfer records concerning approved grants to Grants (below). b) Destroy in office rejected or withdrawn grant proposals when reference value ends.± Agency Policy: Destroy in office after _____	
1.24	**GRANTS** @ Records concerning approved federal, state, and private grants. File includes applications, reports, records of equipment purchased with grant funds, and all relevant programmatic records. Also includes any required certifications and disclosures, documentation about grants issued by the agency, and research records generated as part of a grant project. SEE ALSO: Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records of state and private grants 5 years after final financial report is filed.* c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed. d) Destroy in office records not relating to a specific grant after 1 year. *Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.*	Retention: 09 NCAC 03M .0703 2 CFR 200.333

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.25	**HISTORICAL DESIGNATIONS RECORDS** Records concerning the awarding of historical markers by the agency. Includes applications, review materials, and list of markers.	a) Retain in office permanently the list of historical markers along with the accepted applications. b) Destroy in office after 1 year rejected applications. c) Destroy in office remaining materials after 3 years.	
1.26	**HISTORY RECORDS (AGENCY AND EMPLOYEES)** Records concerning the history of the agency and its employees. Includes published and unpublished histories, biographical data, photographs, newspaper clippings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	
1.27	**IMPROPER CONDUCT INVESTIGATIONS** Records concerning investigations triggered by questions about ethics or conduct within an agency, such as whistleblower reports or allegations of fraud. Includes complaints, reports, investigations, and other related records. Also includes records from an ombuds office.	Destroy in office 3 years after resolution.*	
1.28	**INDICES** @ Listings of where specific information can be found.	Destroy in office when superseded or obsolete.	
1.29	**INTERAGENCY PROGRAMS** Records of programs involving more than one government agency. Includes resource materials, program information, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.30	**INVENTORIES** @ Inventories describing the type of property (including equipment and facilities other and fixed assets), its location, and related information. Also includes inventory control and usage records, such as requisitions/draw tickets, mileage logs, request forms, and other related records.	a) Destroy in office lists of properties, facilities, fixed assets, supplies, and surplus property when superseded or obsolete. b) Destroy in office inventory control and usage records after 3 years.	
1.31	**LEGISLATION AND REGULATORY RECORDS** Notices and copies of proposed or adopted state or federal legislation or regulations affecting the agency.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
1.32	**LOGISTICS MATERIALS** Records concerning scheduled plans of agency personnel and activities. Includes routine notices, task lists, and arrangements.	Destroy in office when superseded or obsolete.	
1.33	**MAIL: UNDELIVERABLE/RETURNED** Outgoing agency mail returned by the post office for any reason, including insufficient postage, incorrect address, forwarding order expired, etc. Also includes outgoing e-mail returned for any reason.	Destroy in office after 30 days. *Retention Note: If notification is necessary for a particular process, reference the relevant case file for disposition instructions (e.g., tax notifications).*	
1.34 	**MAILING AND DISTRIBUTION RECORDS** Includes mailing and meeting notification lists, e-mail distribution lists, Sunshine Lists, and related documentation of transactions with the U.S. Postal Service, state courier, or private carriers.	a) Destroy in office Sunshine Lists when superseded or obsolete. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	Confidentiality: G.S. 132-1.12 G.S. 132-1.13

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.35	**MEMBERSHIP RECORDS** Records concerning associations, organizations, groups, etc., with which the agency is involved. Includes records concerning memberships or registrations on behalf of the agency or agency personnel.	Destroy in office when superseded or obsolete.	
1.36	**MISCELLANEOUS (NON-BUILDING) APPLICATIONS, LICENSES, AND PERMITS** Includes, but not limited to, applications and permits regarding free government-issued business permits, burning, special events, and landscape establishment.	a) Destroy in office 1 year after expiration of license/permit. b) Destroy in office applications for which a license/permit was never issued when reference value ends.± Agency Policy: Destroy in office after _____	
1.37 	**OFFICE AND PROPERTY SECURITY RECORDS** Records concerning the security of agency offices, facilities, vehicles, equipment, property, and personnel. Includes visitors' register; security, employee, or contractor access to facilities or resources; and surveillance system reports and recordings. SEE ALSO: Employee Security Records (STANDARD 8: RISK MANAGEMENT).	a) If the recording necessitates law enforcement action, transfer to the appropriate agency. b) If the recording becomes evidence in a personnel investigation or lawsuit, transfer to Disciplinary Actions (STANDARD 4: HUMAN RESOURCES RECORDS), or Litigation Case Records (STANDARD 6: LEGAL RECORDS). c) Destroy in office recordings not required to support known investigations or litigation after 30 days. d) Destroy in office remaining records after 1 year.	Confidentiality: G.S. 132-1.7

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.38	**ORDINANCES** Includes code of ordinances. See the **SECURITY PRESERVATION COPIES OF RECORDS** section on page A-15 for instructions on imaging.	a) Retain in office official copy permanently. b) Destroy in office ordinance development records when ordinance is no longer in effect. c) Destroy in office additional copies (including tabled or failed ordinances) when reference value ends.± Agency Policy: Destroy in office after _____	
1.39	**PEST CONTROL** Records concerning pest abatement or eradication programs overseen by the agency. SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).	Destroy in office after 3 years.*	
1.40	**PHONE LOGS** Records documenting calls placed and received in the course of conducting agency business. SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Voice over Internet Protocol (VoIP) Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	Destroy in office after 1 year.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.41	**POLICIES AND PROCEDURES** @ Records documenting the formulation, planning, and adoption of policies, procedures, and functions of the agency and its departments. File also includes organizational charts, reorganization studies, and similar records describing the arrangement and administrative structure of the agency. SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS), Electronic Records Policies and Procedures (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
1.42	**POLL LIST/REGISTRATION LIST/ROSTER/ AUTHORIZATION TO VOTE (ATV)** @ Lists documenting registered electors and votes cast prior to County Board of Elections taking over municipal elections. Includes electronic or paper ATV related records such as ATV books, forms, unused stickers, lists, registers, indexes, or similar records used to verify persons are registered voters at each polling location.	Contact State Archives of North Carolina prior to destroying old poll books and voter registration books.	Authority: G.S. 163 Art. 15A G.S. 163-166.7 08 NCAC 10B .0103 52 USC Chap. 205
1.43	**PRICE QUOTATIONS**	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.44	**PROCLAMATIONS AND ORDERS** Proclamations and orders issued by the governing board.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	
1.45	**PROJECTS** @ Includes project correspondence (including e-mail), feasibility studies, final reports, specifications, assessments, notices to proceed, cost estimates, change orders, statements of work, and similar documentation. SEE ALSO: Project Documentation (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records 3 years after completion of project.	
1.46	**PROPERTY MANAGEMENT RECORDS** Includes appraisals of the financial valuation of agency-owned property as well as surveys, plats, and maps. SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).	Destroy in office when superseded or obsolete.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.47	**PUBLIC BODIES: AGENDA AND MEETING PACKETS** Includes agendas and copies of supporting documentation and exhibits submitted and discussed during meetings of public bodies. Also includes documentation of outside meetings attended by agency personnel. SEE ALSO: Public Bodies: Minutes (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	
1.48	**PUBLIC BODIES: APPLICATIONS FOR APPOINTMENT** Applications and related records received from individuals applying for appointments to serve on public boards, commissions, councils, and committees.	a) Destroy in office records concerning appointed individuals 1 year after expiration of term. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	
1.49	**PUBLIC BODIES: APPOINTMENT REPORTS** Includes annual appointment reports filed with the NC Department of the Secretary of State.	Destroy in office after 2 years.	Authority: G.S. 143-157.1
1.50	**PUBLIC BODIES: AUDIO AND VIDEO RECORDINGS OF MEETINGS** SEE ALSO: Public Bodies: Minutes (below).	Destroy in office after approval of official written minutes. *NOTE: If these serve as the official minutes, as allowed by G.S. 143-318.10(e), their retention should be permanent. These disposition instructions apply to recordings produced solely for the purpose of generating official written minutes.*	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.51	**PUBLIC BODIES: CORRESPONDENCE** Records documenting internal and external communications of governing and advisory board members. Includes correspondence (including e-mail) related to decision-making, policy development, and other high-level planning as well as logistical communications.	a) Transfer correspondence (including e-mail) with historical value to History Records (above), after 3 years. b) Destroy in office remaining records after 3 years.	
1.52	**PUBLIC BODIES: MEETING NOTICES** Includes notices and regular meeting schedules. SEE ALSO: Affidavits of Publication (STANDARD 6: LEGAL RECORDS), Publicity Records (STANDARD 7: PUBLIC RELATIONS RECORDS).	Destroy in office after 1 year.	
1.53	**PUBLIC BODIES: MEMBER FILES** Records concerning members of public boards, commissions, councils, and committees. Includes codes of conduct, ethics statements, agreements, notices of resignation, and other related records. Also includes biographical information and waivers. SEE ALSO: Oaths of Office (STANDARD 6: LEGAL RECORDS), Public Bodies: Applications for Appointment (above).	a) Retain in office records with historical value permanently. b) Destroy in office 1 year after superseded or obsolete waivers from board members choosing not to receive stipend/per diem payments. c) Destroy in office remaining records 1 year after service ends.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.54	**PUBLIC BODIES: MINUTES** Includes minutes of the governing board and all subsidiary and advisory boards. Subsidiary boards are defined as boards that exercise or are authorized to exercise legislative, policy-making, quasi-judicial, or administrative functions. Also includes minutes of subcommittees of the governing board and its subsidiary and advisory boards. See the **SECURITY PRESERVATION COPIES OF RECORDS** section on page A-15 for instructions on imaging. SEE ALSO: Ordinances (above), Public Bodies: Agenda and Meeting Packets (above), Public Bodies: Audio and Video Recordings of Meetings (above), Resolutions (below).	a) Retain in office permanently official minutes of the governing board and its subsidiary boards as well as all attachments necessary to understand the body's actions. b) The official minutes of advisory boards may be destroyed only upon approval by the State Archives of North Carolina. The State Archives reserves the right to designate the minutes of any advisory board as permanent. c) Destroy in office minutes of committees or subcommittees when reference value ends, if the minutes or actions and decisions of the committee are entered as part of the minutes of the parent board. If minutes or actions and decisions of the committee or subcommittee in question are not entered as part of the minutes of the parent board, the State Archives reserves the right to designate the minutes as permanent.± Agency Policy: Destroy in office after _____	Authority: G.S. 143-318.10
1.55	**RATE AND FEE SCHEDULES** @ Records relating to rates, fees, and regulations concerning agency services.	Destroy in office when superseded or obsolete.	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.56	**REBATE PROGRAM RECORDS** Applications, receipts, and related records concerning rebate programs sponsored by the agency. These records document programs and incentivized actions that residents may opt into.	a) Destroy in office financial records 3 years after approval.* b) Destroy in office applications 1 year after approval. c) Destroy in office denied applications when reference value ends.± Agency Policy: Destroy in office after _____	
1.57	**RECORDS MANAGEMENT** Includes correspondence (including e-mail) with state and/or federal agencies with regards to records retention. Also includes records disposition documentation, file plans, and copies of records retention and disposition schedules.	a) Retain in office documentation concerning the final disposition of records permanently. b) Destroy in office remaining records when superseded or obsolete.	
1.58	**REFERENCE (READING) FILE** Subject files containing informational copies of records organized by areas of interest. Also includes materials that have no regulatory authority for the recipient and are received from outside the agency or from other units within the agency as well as reference copies of documents where another individual or agency is responsible for maintaining the record copy.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.59	**REPORTS AND STUDIES** @ Records concerning the performance of a department, program, or project, as well as those created for planning purposes. Includes all annual, sub-annual, or irregularly prepared research studies, reports, and studies generated by an agency or prepared by consultants hired by the agency. Also includes reports required to be submitted to the agency. SEE ALSO: Accident/Incident Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Audits: Performance (above), Budget Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Civil Rights Records (STANDARD 6: LEGAL RECORDS), Financial Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Grants (above), Lost, Stolen, or Damaged Property Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Projects (above), Public Bodies: Appointment Reports (above), Strategic Plan (below), and Unemployment Compensation Reports (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Retain in office permanently 1 copy of all annual and biennial reports written by the agency. b) Retain in office permanently reports and studies prepared by request of an agency's governing body or a court. c) Destroy in office after 3 years reports prepared monthly, bimonthly, or semi-annually. d) Destroy in office after 1 year activity reports concerning workload measurements, time studies, number of jobs completed, etc., prepared on a daily or other periodic basis. e) Destroy in office when superseded or obsolete reports required to be submitted to the agency. f) Destroy in office remaining reports and studies when reference value ends.± Agency Policy: Destroy in office after _____. *Retention Note: Reports and studies listed elsewhere in this schedule should be retained the specified period of time.*	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.60	**REQUESTS FOR INFORMATION** Requests received and responses issued by the agency. SEE ALSO: Public Records Requests (STANDARD 7: PUBLIC RELATIONS RECORDS).	Destroy in office after 1 year after resolution.	
1.61	**REQUESTS FOR PROPOSALS (RFP)** Proposals submitted by vendors in response to requests from agency. Also includes notices and evaluations produced by the agency. SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Price Quotations (above).	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
1.62	**RESOLUTIONS** File consists of resolutions indicating date, issues or policy involved, and appropriate signatures. See the **SECURITY PRESERVATION COPIES OF RECORDS** section on page A-15 for instructions on imaging.	a) Retain in office permanently one copy of final resolution. b) Retain in office permanently resolution development records with historical value. c) Destroy in office additional copies of resolutions (including those tabled or failed) along with all remaining development records when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.63	**STAFF MEETINGS FILE** Records concerning meetings of internal committees, groups, or task forces along with external meetings attended by agency personnel. Includes minutes, agendas, meeting packets, visual aids, presentations, notes, recordings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 1 year.	
1.64	**STRATEGIC PLAN** @ Long-range plan outlining policies, guidelines, and plans for future development of the agency. Includes official copy of strategic plan and all background surveys, studies, and reports. Also includes business plans as well as mission statements, goals, and objectives.	a) Retain in office strategic plans permanently. b) Destroy in office background surveys, studies, and reports 5 years after adoption of plan. c) Destroy in office business plans 2 years after execution of plan. d) Destroy in office remaining records when superseded or obsolete.	
1.65	**SURPLUS PROPERTY** Inventories and reports of agency property to be surplussed.	Destroy in office 3 years after disposition of property.*	
1.66	**TRACKING MATERIALS** Records intended to verify the receipt of information, such as certified mail receipts.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
1.67	**TRAVEL REQUESTS** Requests and authorizations for travel. Includes forms and itineraries. SEE ALSO: Price Quotations (above), Travel Reimbursements (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	Destroy in office after 1 year.*	
1.68	**VEHICLE REGISTRATION CARDS** North Carolina registration cards for vehicles in the agency fleet. SEE ALSO: Vehicle Titles (STANDARD 6: LEGAL RECORDS).	Destroy in office when superseded.	
1.69	**WORK ORDERS** Includes date and location of work, cost of materials used and labor, type of work performed, and other related records regarding the repairs of equipment, facilities, and vehicles.	a) If this is the only record documenting completed work, follow disposition instructions for Facility Maintenance, Repair, and Inspection Records (above), or Equipment and Vehicle Maintenance, Repair, and Inspection Records (above). b) Destroy in office remaining records 1 year after work is completed.*	

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STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS

Records created and accumulated concerning the managerial control, budgeting, disbursement, collection, and accounting of the agency**.**

Note: Per 26 CFR 1.148-5(d)(6)(iii)(E), all records necessary to support the tax-exempt status of an agency debt issue must be retained for the life of the debt plus 3 years.

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.01	**ACCOUNTS PAYABLE** Records concerning the status of accounts in which the agency owes money to firms or individuals. Includes invoices, reimbursements, receipts or bills of sale, check registers, and subsidiary registers. Also includes stop payment notices.	a) Destroy in office 5 years after payment documentation of reimbursement for business expenses to employees. b) Destroy in office all remaining records 3 years after payment.*	Retention: 04 NCAC 24D .0501(a)(3)(I)
2.02	**ACCOUNTS RECEIVABLE** @ Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.	Destroy in office 3 years after collection.*	G.S. 105A

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.03	**ACCOUNTS UNCOLLECTABLE** Records of accounts deemed uncollectable, including returned checks, write-off authorizations, and other related records.	Destroy in office 3 years after account is determined to be uncollectable.*	
2.04	**ANNUAL BUDGET** Annual budget and budget message submitted to governing board for approval. SEE ALSO: Budget Reports (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 3 years. *Retention Note: Annual budgets should be entered into the minutes of the governing board.*	Authority: G.S. 159-11
2.05	**ARBITRAGE RECORDS** Records concerning arbitrage rebate calculations and funds rebated.	Destroy in office 3 years after final redemption date of the bonds and after all related debts and obligations have been satisfied.*	Authority: 26 CFR 1.148-3
2.06	**AUDITS: FINANCIAL** @ Records concerning internal and external audits. Includes reports, working papers, and related records. SEE ALSO: Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently final reports related to internal compliance or operational audits or those that document a significant change in agency practices or have significant administrative value. b) Destroy in office after 10 years final reports related to internal accounting systems and controls and those with limited administrative value. c) Destroy in office working papers and remaining records when superseded or obsolete.*	Authority: G.S. 159-34
2.07	**AUTHORIZATION FORMS** Authorization to purchase materials.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.08	**BANK STATEMENTS AND RECONCILIATIONS** Includes bank statements, canceled checks, deposit slips, and reconciliation reports.	Destroy in office after 3 years.*	
2.09	**BIDS FOR DISPOSAL OF PROPERTY** Records concerning the disposal of surplus property. Includes information about various disposition procedures used, such as sealed bids and public auction. SEE ALSO: Accounts Receivable (above).	Destroy in office all records after the disposition of property has been recorded in governing board's minutes.*	Authority: G.S. 153A-176
2.10	**BIDS FOR PURCHASE** Records documenting quotes to supply products and services. Includes advertisements, tabulations, awards letters, records of bids, good faith effort documentation, and related records concerning accepted and rejected bids.	a) Transfer records to Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS) when bid is approved. b) Destroy in office bid records not awarded or opened after 1 year.*	Authority: G.S. 143 Article 8
2.11	**BOND CLOSING RECORDS** Includes applications, agreements, tax records, contracts, official statements, legal opinions, rating letters, public hearing bonds, title insurance, deeds of trust, and other related records concerning bonds issued by the agency. Also includes records concerning expenditure and/or investment of bond proceeds.	Destroy in office 6 years after final maturity.*	Authority: G.S. 159 Article 7

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.12	**BOND REGISTER** Records of all bonds, notes, and coupons issued by the agency detailing the purpose of issuance, the date of issue, serial numbers (if any), denomination, maturity date, and total principal amount.	Retain in office permanently.	Authority: G.S. 159-130
2.13	**BONDS, NOTES, AND COUPONS**	Destroy in office 1 year from date of payment.	Authority: G.S. 159-139
2.14	**BUDGET ADMINISTRATION RECORDS** Records of budget administration. Includes research, correspondence (including e-mail), and other related records.	Destroy in office after 2 years.*	
2.15	**BUDGET EXECUTION RECORDS** Records of authorizations to move funds between budget codes.	Destroy in office when released from audits.	
2.16	**BUDGET REPORTS** Includes daily detail reports and monthly budget reports. Also includes contract budget and expenditure reports and summaries of tax allocations. SEE ALSO: Annual Budget (above).	a) Destroy in office daily detail reports after 1 year.* b) Destroy in office remaining reports after 3 years.*	
2.17	**BUDGET REQUESTS AND WORKING PAPERS** Includes budget requests, cost estimates, expenditures, program requests, salary and wage lists, correspondence (including e-mail), and related records.	Destroy in office after 3 years.*	Authority: G.S. 159-10

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.18	**BUDGET RESOLUTIONS AND ORDINANCES** Includes project ordinances, budget resolutions, and amendments. SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain official copies in the minutes of the governing board. b) Destroy in office remaining copies when reference value ends.± Agency Policy: Destroy in office after _____	Authority: G.S. 159-8 G.S. 159-13 G.S. 159-13.2 G.S. 159-15
2.19	**COST ALLOCATION PLANS** Accounting report that calculates and spreads agency-wide indirect costs to departments and funds that receive a service from other departments.	Destroy in office after 3 years.*	
2.20	**CREDIT/DEBIT/PROCUREMENT CARD RECORDS** Records of assignation of agency credit cards and purchasing cards along with authorization logs.	Destroy in office when superseded or obsolete.*	Confidentiality: G.S. 132-1.2(2)
2.21	**DONATIONS AND SOLICITATIONS** Records concerning requests made to agency by outside organizations. Includes applications and other related records. SEE ALSO: Fund Drive and Event Records (STANDARD 7: PUBLIC RELATIONS RECORDS).	a) Destroy in office records supporting approved donations 1 year after payment. b) Destroy in office rejected applications after 30 days.	
2.22	**ELECTRONIC FUNDS TRANSFERS (EFT)** Includes forms authorizing electronic transfer of monies via wire transfer or automated clearing house (ACH) as well as ACH bank reports.	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 14-113.20

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.23	**ESCHEATS AND UNCLAIMED PROPERTY** Records containing information required to be included in holder reports submitted to the State Treasurer's office.	a) Destroy in office after 10 years if report was filed prior to July 16, 2012.* b) Destroy in office after 5 years if report was filed on or after July 16, 2012.*	Authority: G.S. 116B-60 Retention: G.S. 116B-73
2.24	**FINANCIAL JOURNALS AND LEDGERS**	a) Destroy in office year-end summaries of receipts and disbursements after 3 years.* b) Destroy in office daily, monthly, or quarterly transaction detail journals and ledgers after 1 year.*	
2.25	**FINANCIAL REPORTS**	a) Destroy in office annual financial reports or other reports generated to inform decision-making after 3 years.* b) Destroy monthly or quarterly reports generated for operational purposes after 1 year. c) Destroy logs and distribution repots generated to track transactions when released from audits.	
2.26	**GOVERNMENT EMPLOYEES RETIREMENT SYSTEM MONTHLY REPORTS** Reports produced by the North Carolina Department of State Treasurer regarding the Teachers' and State Employees' Retirement System (TSERS) and the Local Governmental Employees' Retirement System (LGERS).	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.27	**GRANTS: FINANCIAL** @ Records concerning approved federal, state, and private grants received or issued by the agency. Includes all relevant accounting, purchasing, payroll, and other financial records. SEE ALSO: Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS)**.**	a) Destroy records supporting the expenditure of federal funds passed through NC Dept. of Health and Human Services on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records of state and private grants 5 years after final financial report is filed.* c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed. d) Destroy in office records not relating to a specific grant or to grants not funded after 1 year. *Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.*	Retention: 09 NCAC 03M .0703 2 CFR 200.333
2.28	**INVESTMENTS** Includes fund information, portfolio listings and reports, balance sheets, exchange or consent instructions, broker confirmations, notices, and other documentation related to agency investments. Also includes transaction schedules for projecting revenue on investments as well as performance investment reports issued by broker or investment firm.	a) Destroy in office transaction schedules after 2 years.* b) Destroy in office performance investment reports when reference value ends.± Agency Policy: Destroy in office after _____ c) Destroy in office all remaining records after 3 years.*	Authority: G.S. 159-30

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.29	**LOAN RECORDS** Records concerning loans received by the agency. Includes documentation of intent to proceed, loan agreements, promissory notes, letters of credit, statements, notices of principal and interest due, and other related records.	Destroy in office 5 years after satisfaction or cancellation of loan.*	
2.30	**LOCAL GOVERNMENT COMMISSION FINANCIAL STATEMENTS**	Destroy in office after 3 years.*	Authority: G.S. 159-33
2.31	**LONGEVITY PAY**	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.32 	**PAYMENT CARD DATA** Records created in association with payment card transactions entered by third parties for the purchase of goods or services from the agency.	Destroy in office after processed.*	Confidentiality: G.S. 132-1.2(2) G.S. 132-1.10(b)(5)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.33 	**PAYROLL AND EARNINGS RECORDS** Records containing information such as the name, Social Security number, number of hours worked, compensation rate, deductions, and total wages paid each employee per payroll period. Also includes employer contributions (e.g., retirement, healthcare) along with individual and group employee earnings records and payroll registers showing earnings and deductions for each pay period. SEE ALSO: Payroll Deduction Records (below), Time Sheets, Cards, and Attendance Records (below); for 401(k) and other retirement plan payouts, see Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office 30 years from date of separation records necessary for retirement or similar benefits verification. b) Destroy in office remaining records after 5 years.*	Authority: 29 CFR 516.30(a) Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a) 29 CFR 516.5(a) 29 CFR 1627.3(a)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

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@ *In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.*

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.34 	**PAYROLL DEDUCTION RECORDS** Records used to start, modify, or stop all voluntary or required deductions from payroll. Includes tax withholding (NC-4, W-4), retirement and deferred compensation, savings plans, insurance, association dues, orders of garnishment, etc. Used as proof the employee approved of the deduction(s). SEE ALSO: Payroll and Earnings Records (above), Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office tax withholding forms 4 years after termination of deduction.* b) Destroy in office authorizations for deductions for retirement contributions, bank payments, savings plans, insurance, and dues 2 years after termination of deduction. c) Destroy in office remaining records 3 years after termination of deduction.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: IRS Publication 15 29 CFR 516.6(c)(1)
2.35	**POWELL BILL RECORDS** Records include certified statements, expenditures reports, information sheets, financial statements submitted to the North Carolina Department of Transportation, and all other related records.	Destroy in office after 3 years.	
2.36	**PURCHASE ORDERS** Records, forms, packing slips, and attached documents concerning purchased supplies, equipment, and services. SEE ALSO: Grants: Financial (above).	Destroy in office after 3 years.* *Retention Note: Packing slips may be destroyed upon verification of items received if they are not the only record of the purchase of the item.*	
2.37	**QUALIFIED PRODUCTS LISTS (QPL)** Records identifying products approved for purchase by the agency.	Destroy in office 3 years after superseded or obsolete.*	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.38	**REQUISITIONS** Requests for payment or to acquire goods or services. SEE ALSO: Inventories (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office after 1 year.*	
2.39	**SCHOLARSHIP RECORDS** Records concerning scholarships awarded by the agency. Includes applications, award letters, conditions and stipulations, agreements and contracts, disbursement statements, progress reports, and other related records.	a) Destroy in office after 3 years records documenting the awarding of scholarships. b) Destroy in office 1 year after notification of applicant records concerning applications that are denied by the agency or awards that are declined by the recipient.	
2.40	**SHIFT PREMIUM PAY** Authorizations and other related records concerning employees receiving shift premium pay.	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.41	**STATEMENTS OF BACK PAY** Forms used to determine the gross pay an employee would have earned during a specified period for back pay in a grievance decision, settlement agreement, or other order.	Destroy in office 3 years after payment.*	

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.42 	**TAX FORMS** Tax information returns generated by the agency (e.g., 1098, 1099, W-2, W-3) to be reported to the Internal Revenue Service and furnished to the other party to the transaction.	Destroy in office 5 years after submitted to taxpayer and/or IRS.*	Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a) IRS Publication 15
2.43	**TAX RETURNS** Tax returns filed by the agency.	Destroy in office 6 years after filed.*	
2.44	**TIME SHEETS, CARDS, AND ATTENDANCE RECORDS** Records documenting the work hours and attendance of employees. SEE ALSO: Payroll and Earnings Records (above).	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a) 29 CFR 516.6(a)(1)

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
2.45	**TRAVEL REIMBURSEMENTS** Includes requests and authorizations for reimbursement for travel and related expenses. SEE ALSO: Grants: Financial (above), Travel Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.46 	**VENDORS** Files maintained on specific vendors authorized or debarred from doing business with the agency. Includes name and address, correspondence (including e-mail), and other related records.	Destroy in office when superseded or obsolete.	

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STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS

Official records received and created by agency geographic information system programs. See G.S. 132-10 for information about providing public access to GIS databases.

ITEM #	*STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS*		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
3.01	**GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA** Geo-referenced data and metadata to facilitate the management, manipulation, analysis, modeling, representation, and spatial analysis of complex problems regarding planning and management of resources.	Retain in office parcel, boundary, zoning, and orthoimagery layers (with accompanying data sets) permanently. *Retention Note: Other datasets should be kept according to standards and procedures set by the* North Carolina Geographic Information Coordinating Council. *See also* **GEOSPATIAL RECORDS**, *page A-13.*	
3.02	**GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA)** Records created during development or modification of an automated system which are necessary to access, retrieve, manipulate, and interpret data in that system; and records that explain the meaning, purpose, structure, local relationships, and origin of the data elements. Includes data element dictionaries, file layout, codebooks and tables, and definition files.	Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

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@ *In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.*

ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
3.03	**GEOGRAPHIC INFORMATION SYSTEM (GIS) INTERNAL STANDARDS AND PROCEDURES** Includes requirements that are intended to make hardware, software, and data compatible and that cover data capture, accuracy, sources, base categories, output, and data element dictionaries.	Retain in office permanently.	
3.04	**GEOGRAPHIC INFORMATION SYSTEM (GIS) MONITORING RECORDS** Includes system security, quality assurance, transaction tracking, and other related activity monitoring records.	Destroy in office after 1 year.	
3.05	**GEOGRAPHIC INFORMATION SYSTEM (GIS) OPERATIONAL RECORDS** Includes user guides, system flowcharts, job or workflow records, system specifications, and similar documentation.	Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).	
3.06	**GEOGRAPHIC INFORMATION SYSTEM (GIS) PROJECT RECORDS**	a) Retain in office GIS datasets and accompanying documentation (metadata) with historical and/or legal value permanently. b) Destroy in office remaining items when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
3.07	**LAYERS: ADDRESS POINTS** See also **GEOSPATIAL RECORDS**, page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	
3.08	**LAYERS: CORPORATE LIMITS** See also **GEOSPATIAL RECORDS**, page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
3.09	**LAYERS: EXTRATERRITORIAL JURISDICTIONS** See also **GEOSPATIAL RECORDS**, page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	
3.10	**LAYERS: ORTHOIMAGERY** See also **GEOSPATIAL RECORDS**, page A-13.	Create a snapshot of dataset when created. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
3.11	**LAYERS: STREET CENTERLINE** See also **GEOSPATIAL RECORDS**, page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	
3.12	**MAPPING PROJECT RECORDS** Includes contract maps and all deliverable products for aerial photography, orthophotography, cartographic, cadastral, and digital mapping projects. See also **GEOSPATIAL RECORDS**, page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
3.13	**MAPS: PARCEL** Maps, including cadastral maps, and surveys of boundaries and measurements of each parcel, and information about encroachments, right-of-ways, and structures. See also **GEOSPATIAL RECORDS**, page A-13, and Property Management Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Paper: Destroy in office upon State Archives approval. GIS dataset: Create a snapshot of dataset quarterly. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	
3.14	**MAPS: PARKS** Includes park boundaries, facilities, landscaping, topography, and other pertinent information. Also includes maps and drawings stored and generated by Geographic Information System (GIS) and computer-aided design (CAD) systems. See also **GEOSPATIAL RECORDS**, page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, *Either:* Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council. *Or:* If retained in office permanently, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
3.15	**MAPS: ALL OTHER** @ Includes field maps, soil, topographic, sales, subdivision plats, right-of-way, sectional, highway, etc. Also includes paper maps.	a) Retain in office maps, including GIS datasets and accompanying documentation (metadata), with historical and/or legal value permanently. b) Destroy in office remaining items when reference value ends.± *Retention note: Contact the State Archives of North Carolina before destroying any tax maps, watershed maps, or zoning maps.* Agency Policy: Destroy in office after _____	

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STANDARD 4: HUMAN RESOURCES RECORDS

Official records and materials created and accumulated incidental to the employment, qualifications, training, and pay status of agency employees. Comply with applicable provisions of G.S. 115C Article 21A (LPSUs), G.S. 122C-158 (area authorities), G.S. 130A-45.9 (public health authorities), G.S. 153A-98 (county), G.S. 160A-168 (municipal), G.S. 161E-257.2 (public hospitals), and G.S. 162A-6.1 (water and sewer authorities) regarding confidentiality of personnel records.

ITEM #	*STANDARD 4: HUMAN RESOURCES RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.01	**ABOLISHED POSITIONS** Records concerning positions that have been abolished.	Destroy in office after 1 year.	
4.02 	**ADMINISTRATIVE INVESTIGATIONS** Records concerning the investigation of conduct problems among agency personnel. SEE ALSO: Disciplinary Actions (below).	a) Destroy in office after 3 years records concerning complaints against agency personnel that are resolved without an internal investigation. b) Destroy in office after 5 years records concerning complaints lodged against agency personnel that are exonerated. c) Destroy in office 5 years after final disposition or expiration of relevant statute of limitations complaints lodged against agency personnel that are settled out-of-court. d) Transfer investigation reports, disciplinary actions, and other related internal affairs case records to Personnel Records (Official Copy) (below).	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.03 	**APPLICATIONS FOR EMPLOYMENT** Records submitted by job applicants for vacant positions or by current employees for promotion, transfer, or training opportunities. Includes applications, transcripts, resumes, letters of reference, and other related records.	a) Transfer applications, resumes, transcripts, and similar records as applicable to Personnel Records (Official Copy) (below) or Seasonal and Contract Worker Records (below). b) Destroy in office after 2 years unsolicited application materials from individuals hired. c) Destroy in office records concerning individuals not hired 2 years after date of receipt, if no charge of discrimination has been filed. If charge has been filed, destroy in office 1 year after resolution of charge.* d) Destroy in office 2 years after receipt unsolicited applications/resumes and those received after posted closing dates.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31
4.04	**APPRENTICESHIP PROGRAM RECORDS** Records concerning registered apprenticeship programs. Includes applications and selection materials as well as aggregated data. Also includes apprenticeship affirmative action plans.	Destroy in office 5 years after the making of the record or the personnel action involved, whichever occurs later.	Authority: 29 CFR 30.4(a) 29 CFR 1602.20 Retention: 29 CFR 30.12(d) 29 CFR 1602.21

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.05 	**APTITUDE AND SKILLS TESTING RECORDS** Records concerning aptitude and skills tests required of job applicants or of current employees to qualify for promotion or transfer. Includes civil service examinations. SEE ALSO: Employment Selection Records (below).	Destroy in office after 2 years.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)(iv)
4.06	**ASBESTOS TRAINING** Records concerning training programs about the proper management of asbestos. SEE ALSO: Bloodborne Pathogen Training (below), Hazardous Materials Training Records (below).	a) Destroy in office employee-specific records 1 year after separation. b) Destroy in office remaining records when superseded or obsolete.	Retention: 29 CFR 1910.1001(m)(4)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.07	**BENEFITS RECORDS** Records concerning life, health, accident, and disability insurance plans as well as seniority and merit systems. Includes records concerning systems in which employees can select fringe benefits from a cafeteria plan, including flexible spending plans. File also includes notifications, election and claim forms, rejection letters, and other records related to COBRA (Consolidated Omnibus Budget Reconciliation Act).	a) Destroy in office approved claims forms after 2 years.* b) Destroy in office rejected requests 6 months after decision. c) Destroy in office 3 years after employee returns or eligibility expires notifications to employees or dependents informing them of their rights to continue insurance coverage after termination or during disability or family leave. d) Destroy in office remaining records 1 year after plan is terminated.	Retention: 29 CFR 1627.3(b)(2)
4.08	**BLOODBORNE PATHOGEN TRAINING** Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors. SEE ALSO: Asbestos Training (above), Hazardous Materials Training Records (below).	Destroy in office after 3 years.	Retention: 29 CFR 1910.1030(h)(2)(ii)
4.09	**DIRECTORIES, ROSTERS, OR INDICES** Includes records listing employees, their job titles, work locations, phone numbers, e-mail addresses, and similar information.	Destroy in office when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.10	**DISABILITY SALARY CONTINUATION CLAIMS** Forms used by disabled employees to apply for salary continuation benefits. Also include short-term disability claims forms and other related records.	a) Transfer original forms to Local Government Employees' Retirement System (LGERS) or Teachers' and State Employees' Retirement System (TSERS) for action when received. b) Destroy in office remaining records after 3 years.	
4.11	**DISCIPLINARY ACTIONS** Correspondence (including e-mail) and other records concerning disciplinary actions taken against employees by personnel or supervisory staff, including records documenting terminations. Includes records created by civil service boards when considering, or reconsidering on appeal, an adverse action against an employee.	a) Transfer records as applicable to Personnel Records (Official Copy) (below). b) Destroy in office all remaining records 2 years after resolution of all actions.	Authority: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 Subject to the public information provision delineated in the above authorities.

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.12	**DUAL EMPLOYMENT** Records concerning employees' requests and authorizations to accept employment with another local government agency. SEE ALSO: Secondary Employment (below).	a) Destroy in office approved requests and related records 1 year after employee terminates additional employment. b) Destroy in office denied requests and related records after 6 months.	
4.13 	**EDUCATIONAL LEAVE AND REIMBURSEMENT** Includes records requesting educational leave and tuition assistance, reimbursements, and other related records. SEE ALSO: Leave Records (below).	a) Transfer records documenting approved leave requests to Personnel Records (Official Copy) (below). b) Destroy in office records concerning denied requests 6 months after denial.* c) Destroy in office records concerning approved tuition reimbursements 3 years after reimbursement.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.14 	**EMPLOYEE ASSISTANCE PROGRAMS** Records documenting assistance and counseling opportunities. Includes requests for information, referrals, forms, releases, correspondence, and other related records.	Destroy in office after 3 years.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.15 	**EMPLOYMENT ELIGIBILITY RECORDS** Includes the I-9 forms, employment authorization documents filed with the U.S. Department of Labor, petitions filed by the agency, E-Verify documentation, and Selective Service Registration compliance forms.	a) I-9 forms have mandatory retention throughout the duration of an individual's employment. After separation, destroy records in office 3 years from date of hire or 1 year from separation, whichever occurs later. b) Destroy in office after 5 years employment authorization documents filed with the U.S. Department of Labor. c) Destroy in office immigrant or nonimmigrant petitions filed by the agency 3 years after employee separation. d) Destroy in office remaining records 1 year after employee separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 8 USC 1324a(b)(3)
4.16 	**EMPLOYMENT SELECTION RECORDS** Records concerning the selection of applicants for vacant positions or of current employees for promotion, transfer, or training opportunities. Includes interview documentation, rosters, eligibility lists, test ranking sheets, justification statements, background and criminal history checks, and similar records. SEE ALSO: Applications for Employment (above), Aptitude and Skills Testing Records (above).	a) Destroy in office background and criminal history checks after 5 years. b) Destroy in office remaining records 2 years after hiring decision.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.17 	**EXIT INTERVIEW RECORDS** Includes feedback from employees planning to separate from the agency.	Destroy in office after 1 year.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.18 	**FAMILY MEDICAL LEAVE ACT (FMLA) RECORDS** Records concerning leave taken, premium payments, employer notice, medical examinations considered in connection with personnel action, disputes with employees over FMLA, and other related records. SEE ALSO: Leave Records (below).	Destroy in office 3 years after leave ends.*	Authority: 29 CFR 825.110 Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 825.500(b)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.19 	**GRIEVANCES** Includes initial complaint by employee, investigation, action, summary, and disposition. SEE ALSO: Disciplinary Actions (above), Personnel Records (Official Copy) (below).	Destroy in office after 2 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.20	**HAZARDOUS MATERIALS TRAINING RECORDS** Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors. May also include documentation of loans of radioactive materials for the purpose of training exercises. SEE ALSO: Asbestos Training (above), Bloodborne Pathogen Training (above).	Destroy in office after 5 years.	Authority: 29 CFR 1910.120(p)(8)(iii) 10A NCAC 15
4.21	**INTERNSHIP PROGRAM** Records concerning interns and students who work for the agency.	Destroy in office after 2 years.	
4.22	**LAW ENFORCEMENT TRAINING** Records concerning internal training for law enforcement personnel.	Retain in office permanently.	

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.23 	**LEAVE RECORDS** Records concerning employee leave, including requests for and approval of sick, vacation, overtime, buy-back, shared, donated, etc. Also includes records documenting leave without pay. SEE ALSO: Educational Leave and Reimbursement (above), Family Medical Leave Act (FMLA) Records (above), Military Leave (below).	a) Destroy in office approved requests 3 years after return or separation of employee.* b) Destroy in office denied requests after 6 months.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.24 	**MEDICAL RECORDS** Records for employees, contractors, and volunteers concerning asbestos, toxic substances, and bloodborne pathogen exposure; physical examinations required by the employer in connection with any personnel action, including health or physical examination reports, or certificates created in accordance with the Americans with Disabilities Act (ADA); and records of injury or illness. (Does not include worker's compensation or health insurance claim records.) SEE ALSO: Benefits Records (above), Workers' Compensation Program Claims (below).	a) Destroy in office exposure records 30 years after date of exposure.* b) Destroy in office records pertaining to first-aid job-related illness and injury after 5 years. c) Provide medical records to employees who have worked for less than 1 year at time of separation. d) Destroy in office after 1 year records concerning physical examinations or health certificates. e) Destroy in office remaining records 30 years after employee separation. *Retention Note: Records must be maintained separately from an employee's personnel jacket. If part of a worker's compensation claim, follow disposition for Workers' Compensation Program Claims (below).*	Authority: 29 CFR 1910.1020(e) Confidentiality: 29 CFR 1630.14(c)(1) 29 CFR 1910.1030(h)(1)(iii) Retention: 29 CFR 1627.3(b)(1)(v) 29 CFR 1910.1020(d) 42 USC 12112(d)(3)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.25	**MILITARY LEAVE** Records concerning military leave, as established by the Uniformed Services Employment and Reemployment Rights Act (USERRA). SEE ALSO: Leave Records (above).	Destroy in office 3 years after leave ends or employee separates from agency.*	Authority: 5 CFR 1208
4.26 	**PERFORMANCE REVIEWS** Information used to establish employees' goals and primary tasks. Records used to evaluate each employee's work performance. SEE ALSO: Personnel Records (Official Copy) (below).	Destroy in office after 3 years.	Confidentiality (applies only to performance evaluations): G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 60A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.27	**PERSONNEL ACTION NOTICES** Records used to create or change information in the personnel records of individual employees concerning such issues as hiring, termination, transfer, pay grade, and position or job title.	Transfer records to Personnel Records (Official Copy) (below).	Subject to the public information provision delineated in relevant General Statutes.

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.28 	**PERSONNEL RECORDS (OFFICIAL COPY)** Official copy of personnel file maintained on each permanent and temporary agency employee that is eligible for benefits. Includes basic employee information and records and forms relating to the selection or non-selection, promotion, transfer, leave, salary, suspension, and termination of employment. Note: For agencies responsible for maintaining personnel files for criminal justice officers, please consult 12 NCAC 09C .0307 for the mandatory records of certification that must be housed in the personnel file. SEE ALSO: Medical Records (above), Seasonal and Contract Worker Records (below).	a) Destroy in office after 30 years from date of separation information needed to document: date and amount of each increase or decrease in salary with that agency; date and type of each promotion, demotion, transfer, suspension, separation, or other change in position classification with that agency; date and general description of the reasons for each promotion with that agency; date and type of each dismissal, suspension, or demotion for disciplinary reasons taken by the agency; and, if the disciplinary action was a dismissal, a copy of the written notice of the final decision of the agency setting forth the specific acts or omissions that are the basis of the dismissal. b) Destroy in office information necessary to verify benefits 30 years after date of separation. c) Destroy in office remaining records when individual retention periods are reached as noted in individual items in this Records Retention and Disposition Schedule.	Authority/ Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.29 	**PERSONNEL RECORDS (SUPERVISOR COPY)** Personnel jacket that is often maintained by supervisors.	a) Transfer records as applicable to Personnel Records (Official Copy) (above). b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.30	**POLICIES AND PROCEDURES (PERSONNEL)** Official internal agency personnel policies and procedures. Also includes agreements and authorizations required of employees, orientation materials, and informational data. SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), and Workers' Compensation Program Administration (below).	a) Retain in office internal agency personnel policies and procedures permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.31 	**POLYGRAPH RECORDS** Includes statements informing employee of the time, place, and reasons for the test; copy of notice sent to examiner identifying employee to be tested; and copies of opinions, reports, or similar records generated by the examiner and provided to the agency.	Destroy in office 3 years from the date the test was given, or from the date the test was requested if no examination was given.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 801.30

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.32	**POSITION CLASSIFICATION, CONTROL, AND HISTORY** Records concerning personnel actions and position control, status of each established permanent, temporary full-time, or part-time position, and other related topics. Also includes listings providing classification, titles, and position numbers. SEE ALSO: Position Descriptions (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.33	**POSITION DESCRIPTIONS** Includes information on job title, grade, duties, agency assigned, and responsibilities.	Destroy in office 2 years after superseded.	Retention: 29 CFR 1620.32
4.34	**POSITION EVALUATIONS** Forms used to evaluate the primary purpose of a position.	Destroy in office after 1 year.	
4.35	**RECRUITMENT RECORDS** Includes ads and notices of overtime, promotion, and training. Also includes employment listings.	Destroy in office 1 year from date of record.	Retention: 29 CFR 1627.3(b)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.36	**RETIREMENT RECORDS** Includes descriptive information about retirement systems along with plans and related records outlining the terms of employee pension and other deferred compensation plans, including 401(k). SEE ALSO: Payroll and Earnings Records; Payroll Deduction Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Destroy in office descriptive information about retirement plans 1 year after plan is terminated. b) Destroy in office records concerning employer-sponsored retirement plans 7 years after payment.* c) Transfer Local Governmental Employees' Retirement System (LGERS) forms to Department of State Treasurer. d) Transfer applicable records to Personnel Records (Official Copy) (above).	Retention: 29 CFR 1627.3(b)(2)
4.37	**SEASONAL AND CONTRACT WORKER RECORDS** Records concerning seasonal or contractual employees who are not provided with or eligible for benefits. SEE ALSO: Personnel Records (Official Copy) (above).	Destroy in office 5 years after date of separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.38	**SECONDARY EMPLOYMENT** Records concerning employees' requests and authorizations to accept employment with a private entity. SEE ALSO: Dual Employment (above.)	a) Destroy in office approved requests and related records 1 year after employee terminates outside employment. b) Destroy in office denied requests and related records after 6 months.	

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.39	**SERVICE AWARDS AND COMMENDATIONS** Includes award and selection committee reports, nominations, selection criteria, and similar administrative records relating to employee recognition or incentive programs. SEE ALSO: Personnel Records (Official Copy) (above).	Destroy in office 2 years from date of record creation or the personnel action involved.	
4.40	**SUGGESTIONS AND SURVEYS** Recommendations and feedback submitted by agency employees.	Destroy in office after 1 year.	
4.41	**TRAINING AND EDUCATIONAL RECORDS** Records concerning the delivery of training to agency personnel. Includes training manuals, syllabi and course outlines, and other related records. Also includes employee-specific records (certificates, transcripts, test scores, etc.) relating to the training, testing, or continuing education of employees. SEE ALSO: Conferences and Workshops (STANDARD 7: PUBLIC RELATIONS RECORDS), Educational Leave and Reimbursement (above). Other required trainings are handled in Asbestos Training (above), Bloodborne Pathogen Training (above), Hazardous Materials Training Records (above), Law Enforcement Training (above).	a) Transfer records as applicable to Personnel Records (Official Copy) (above), if such training and testing is required for the position held or could affect career advancement. b) Destroy in office certifications and other qualifications 5 years after expiration or employee separation. c) Destroy in office general training materials when superseded or obsolete. d) Destroy in office remaining employee-specific records after 1 year.	Retention: 29 CFR 1627.3(b)(1)(iv)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.42 	**UNEMPLOYMENT COMPENSATION CLAIMS** Claim forms and other related records concerning unemployment compensation cases.	Destroy in office after 5 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a)
4.43	**UNEMPLOYMENT COMPENSATION REPORTS** Quarterly reports showing month-to-date wages, month-to-date compensation, year-to-date wages, and year-to-date compensation for each employee. May be filed with NC Division of Employment Security.	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
4.44	**UNEMPLOYMENT INSURANCE** Forms submitted to the Department of Commerce to report wage records of terminated employees.	Transfer to the N.C. Department of Commerce, Division of Employment Security.	
4.45	**VERIFICATION OF EMPLOYMENT RECORDS** Inquiries and responses concerning verification of an employee's prior or current employment with the agency.	Destroy in office after 1 year.	
4.46	**VOLUNTEER RECORDS** Records concerning individuals who volunteer to assist with various agency activities.	Destroy in office 2 years after completion of assignment.	

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
4.47	**WORK SCHEDULES AND ASSIGNMENTS** Records concerning work, duty, shift, crew, or case schedules, rosters, or assignments.	Destroy in office after 1 year.	
4.48	**WORKERS' COMPENSATION PROGRAM ADMINISTRATION** Includes program policies, guidelines, and related administrative documentation.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.49 	**WORKERS' COMPENSATION PROGRAM CLAIMS** Records concerning workers' compensation claims filed by employees' supervisors concerning accidental injuries or illnesses suffered on the job. Includes Employer's Report of Injury to Employee (Form 19), accident investigation reports, medical reports, claim cost reports, reference copies of medical invoices, and other related records. *Note: All official copies of claims records should be transferred to the North Carolina Industrial Commission in compliance with G.S. 97-92(a).*	Destroy in office agency's working file for workers' compensation claims by its employees 5 years after employee returns to work or separates from agency.*	Confidentiality: G.S. 8-53 G.S. 97-92(b)

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STANDARD 5: INFORMATION TECHNOLOGY (IT) RECORDS

Information technology encompasses all activities undertaken by agency to design, develop, and operate electronic information systems. This section covers records for which Information Technology personnel are responsible, including administrative records and those used to process data and monitor and control operations.

Note: Administration, use, and retention of records concerning computer and information security should comply with applicable provisions of G.S. 132-6.1 on the confidentiality of records regarding "hardware or software security, passwords, or security standards, procedures, processes, configurations, software, and codes." (G.S. 132-6.1 (c))

ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
5.01 	**AUDITS: IT SYSTEMS** Records documenting user actions affecting the contents of monitored systems. Also includes fixity checks and other periodic tests of data validity.	a) Destroy in office 1 year after superseded or obsolete fixity check documentation. b) Destroy in office remaining records after disposition of record.*	Confidentiality: G.S. 132-6.1(c)
5.02	**COMPUTER AND NETWORK USAGE RECORDS** Records documenting usage of electronic devices and networks. Includes login files, system usage files, individual program usage files, and records of use of the Internet by employees.	Destroy in office after 1 year.	
5.03	**DATA DOCUMENTATION RECORDS** Records concerning data in automated systems. Includes data element dictionary, file layout, code book or table, entity relationships tables, and other records related to the structure, management, and organization of data.	Destroy in office 3 years after system is discontinued and/or replaced.	

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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
5.04	**DATA MIGRATION RECORDS** Technical records documenting data migrations. *Note: The data itself is subject to the disposition instructions indicated for its relevant records series; these are merely records about migrating said data.*	Destroy in office 1 year after completion of data migration.	
5.05	**DATA WAREHOUSES** Federated data gathered by the agency from other sources for the purposes of comparison and distribution. SEE ALSO: Collected Data (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office when superseded or obsolete.	Maintain confidentiality consistent with any restrictions placed on the data provider.
5.06	**DIGITIZATION AND SCANNING RECORDS** Records concerning data entry and imaging operations. Includes quality control records. See also **REQUEST FOR DISPOSAL OF ORIGINAL RECORDS DUPLICATED BY ELECTRONIC MEANS**, page A-21.	Destroy in office 10 days after digitization. *Note: The digital surrogate becomes the record copy and must be retained according to the disposition instructions for that record type.*	
5.07 	**ELECTRONIC RECORDS POLICIES AND PROCEDURES** Includes procedural manuals as well as an Electronic Records and Imaging Policy and a Security Backup Policy.	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.7(b) G.S. 132-6.1(c)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
5.08	**INFORMATION TECHNOLOGY ASSISTANCE RECORDS** Records documenting troubleshooting and problem-solving assistance provided by agency information systems personnel to users of the systems. Includes help desk assistance requests, resolution records, and related documentation.	Destroy in office 1 year after work is completed.	
5.09 	**NETWORK AND SYSTEM SECURITY RECORDS** Records documenting cybersecurity efforts. Includes records concerning firewalls, anti-virus programs, intruder scanning logs, and other related records.	a) Destroy in office finalized cyber incident reports 5 years after resolution. b) Destroy in office after 2 years records documenting incidents involving unauthorized attempted entry or probes on data processing systems, IT systems, telecommunications networks, and electronic security systems. c) Destroy in office after 1 year records concerning firewalls, anti-virus programs, and other related records.	Confidentiality: G.S. 132-6.1(c)
5.10 	**NETWORK DIAGRAMS** Records documenting the logical and physical relationships of network components for purposes of organization, deployment, troubleshooting, monitoring of access, and management of day-to-day operations.	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-6.1(c)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
5.11	**PROJECT DOCUMENTATION** Records created to design, develop, control, or monitor a specific project or group of IT projects. Includes statements of work, assessments, maintenance agreements, and testing records. SEE ALSO: Projects (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently records with historical value. b) Destroy in office remaining records 3 years after completion of project.	
5.12	**SOFTWARE LICENSE AND COPYRIGHT PROVISIONS RECORDS** Records documenting compliance with agency software license and copyright provisions. Includes software licenses, correspondence (including e-mail), and related documentation.	Destroy in office 1 year after software is superseded or obsolete.	
5.13	**SYSTEM ACCESS RECORDS** Records documenting access requests and authorizations, system access logs, and other related records.	Destroy in office 1 year after superseded or obsolete.	
5.14 	**SYSTEM DOCUMENTATION RECORDS** Records documenting operating systems, application programs, structure and form of datasets, system structure, and system-to-system communication. Includes system overviews, dataset inventories, server name, IP address, purpose of the system, vendor-supplied documentation, installed software, and current source code.	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.1(g) G.S. 132-6.1(c)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
5.15	**SYSTEM MAINTENANCE RECORDS: HARDWARE REPAIR OR SERVICE** Records documenting inspections, maintenance, and repairs of agency computer systems that are owned or leased. Includes computer equipment inventories and service records. SEE ALSO: Equipment and Vehicle Maintenance, Repair, and Inspection Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office records documenting routine inspections and maintenance of equipment after 1 year. b) Destroy records documenting all other equipment maintenance and repairs upon the final disposition of the equipment.	
5.16	**SYSTEM MAINTENANCE RECORDS: RECORDS BACKUPS** Records documenting regular or essential system backups. Includes backup tape inventories, relevant correspondence (including e-mail), and related documentation. See also *Security Backup Files as Public Records in North Carolina: Guidelines for the Recycling, Destruction, Erasure, and Re-use of Security Backup Files*, available on the State Archives of North Carolina website.	Destroy in office in accordance with your office's established, regular backup plan and procedures.± Agency Policy: Destroy in office after _____	
5.17	**TECHNICAL PROGRAM DOCUMENTATION** Records concerning program code, program flowcharts, program maintenance logs, systems change notices, and other related records that document modifications to computer programs.	Destroy in office 1 year after superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
5.18	**VOICE OVER INTERNET PROTOCOL (VoIP) RECORDS** Records concerning line registrations, calls logs, and voicemail records.	a) Destroy in office records concerning line registration when superseded or obsolete. b) Destroy in office call logs after 1 year. c) Destroy in office voicemail records after 30 days.	
5.19	**WEB MANAGEMENT AND OPERATIONS RECORDS: STRUCTURE** Site maps that show the directory structure into which content pages are organized, and commercial, off-the-shelf software configuration or content management system files used to operate the site and establish its look and feel. Includes server environment configuration specifications. SEE ALSO: Website (Electronic) (STANDARD 7: PUBLIC RELATIONS RECORDS).	Destroy in office when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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STANDARD 6: LEGAL RECORDS

Official documentation created or accumulated to substantiate the rights, obligations, or interests of the agency or their individual employees or clients. Please note the confidentiality that G.S. 132-1.1(a) confers to communications by legal counsel expires three years after receipt of such communication.

ITEM #	*STANDARD 6: LEGAL RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.01	**AFFIDAVITS OF PUBLICATION** Proof of publication provided by newspapers regarding publication of ordinances, public hearings, bid solicitations, payment of bills, public sales, etc. SEE ALSO: Public Bodies: Meeting Notices (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently if record provides sole evidence of publication. b) Destroy in office remaining records after 3 years.*	Authority: G.S. 1-600
6.02	**ANNEXATION RECORDS** Records concerning annexation of property into the city. Includes petitions, reports, correspondence (including e-mail), maps, ordinances, and public hearings.	a) Destroy in office withdrawn petitions after 1 year. b) Retain remaining records in office permanently. *Retention Note: Annexation maps and ordinances must be filed with the County Register of Deeds office and the office of the Secretary of State (G.S. 160A-29, G.S. 160A-58.61 and G.S. 160A-58.90). A map must also be filed with the county board of elections (G.S. 163-288.1).*	
6.03	**AUTHENTICATIONS** Certificates of authentication issued by the agency.	Retain in office permanently.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.04	**CIVIL RIGHTS CASE RECORDS** Records concerning discrimination complaints by employees or former employees and employee requests for reasonable accommodation. Includes equal opportunity (EO) complaints. SEE ALSO: Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Personnel Records (Official Copy) (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office requests for reasonable accommodation 2 years after they become obsolete. b) Destroy in office discrimination complaints 1 year after final disposition of the charge or the action.* *Retention Note: 29 CFR 1602.14 defines final disposition of the charge or the action as "the date of expiration of the statutory period within which the aggrieved person may bring an action in a U.S. District Court or, where an action is brought against an employer either by the aggrieved person, the Commission, or by the Attorney General, the date on which such litigation is terminated."*	Retention: 29 CFR 1602.14 29 CFR 1602.31

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.05	**CIVIL RIGHTS RECORDS** Records concerning documentation of personnel policies and procedures to comply with the Age Discrimination in Employment Act (ADEA), the Americans with Disabilities Act (ADA), the Equal Pay Act, the Genetic Information Nondiscrimination Act (GINA), Section 504 of the 1973 Rehabilitation Act, and the 1964 Civil Rights Act. Includes reports required by the Equal Employment Opportunity (EEO) Commission and affirmative action plans. SEE ALSO: Civil Rights Case Records (above), Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS).	Destroy in office 3 years after superseded or obsolete.	Authority: 29 CFR 1602.1 29 CFR 1602.7 29 CFR 1608.4 Retention: 29 CFR 1602.30 29 CFR 1602.32 34 CFR 104.6(c)(2)
6.06	**CONDEMNATION RECORDS** Settled and pending condemnation cases. SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records.	Retain in office permanently.	

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.07	**CONFLICT OF INTEREST AND CONFLICT OF COMMITMENT DISCLOSURE STATEMENTS** Completed by the elected agency officials as well as designated staff members in order to disclose an official's status or ownership interests.	Destroy in office 1 year after completion of term or separation.	
6.08	**CONTRACTS, LEASES, AND AGREEMENTS** @ Contracts and agreements for construction, equipment, property, supplies, special programs, and projects. Includes franchise agreements, hold harmless agreements, good faith effort documentation, contractor compliance monitoring, leases, and memoranda of understanding. SEE ALSO: Software License and Copyright Provisions Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Retain in office contracts and agreements with historical value permanently. b) Destroy in office sealed contract records 10 years after expiration of contract.* c) Destroy in office all records related to capital improvement contracts and business associate agreements 6 years after completion, termination, or expiration.* d) Destroy in office records documenting restrictions and compliance with license and copyright provisions for products and services purchased by the agency 1 year after superseded or obsolete.* e) Destroy in office all other contracts and agreements 3 years after completion, termination, or expiration.*	Retention: G.S. 1-47(2) G.S. 1-50(a)(5) 45 CFR 164.316 G.S. 1-52
6.09	**DECLARATORY RULINGS** Records concerning declaratory rulings issued by the agency to interpret statutes or rules as applied to a specified set of facts.	Retain in office permanently.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.10	**DELEGATION OF AUTHORITY RECORDS** Records documenting delegations of power to authorize agency business. Includes signature authorities and powers of attorney.	Destroy in office 1 year after superseded or obsolete.	
6.11	**EASEMENTS AND RIGHT-OF-WAY AGREEMENTS** Granted to the agency. SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records; LOCAL PROGRAM SCHEDULE, Excavation Permits and Right-of-Way Acquisition Working Records (STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS).	Destroy in office 10 years after expiration of agreement.	
6.12	**ENCROACHMENTS** Records concerning agreements granted by or to the agency. Also includes maps or drawings detailing construction plans attached to agreements.	a) Retain in office permanently records concerning agreements granted by outside entities to the agency. b) Destroy in office when superseded or obsolete records concerning agreements granted to utilities, businesses, and private residents to encroach upon agency property.	
6.13	**EXPUNCTIONS** Expunction orders received by local agencies.	Destroy in office when record is expunged.	

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.14	**INVESTIGATION AND HEARING RECORDS** Records concerning complaints, fraud allegations, contestments, grievances, and inquiries against individuals and other entities. Includes summaries, charges, reports, assessments and findings, hearing transcripts and evidence, decisions and sanctions, referrals, correspondence, and other related records.	Destroy in office 3 years after completion.*	
6.15	**LAND OWNERSHIP RECORDS** Includes deeds and titles.	Destroy in office 1 year after agency relinquishes ownership of land.*	
6.16 	**LEGAL CORRESPONDENCE** Correspondence (including e-mail) and related records concerning legal matters not related to specific legal cases or official opinions.	Destroy in office after 5 years. For information on handling e-mail, see **ELECTRONIC RECORDS**, page A-11.	Confidentiality: G.S. 132-1.1(a)
6.17	**LEGAL OPINIONS** Formal legal opinions written by counsel in response to requests concerning the governance and administration of the agency.	Retain in office permanently.	
6.18 	**LEGAL REVIEW RECORDS** Includes legal reviews of by-laws and charges to boards and commissions, conflicts of interest, and all other agency matters as requested. SEE ALSO: Legal Opinions (above).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a)

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.19 	**LITIGATION CASE RECORDS** Civil suits to which the agency is a party. Includes affidavits, agreements, appeals, bills, briefs, citations, commitments, complaints, discharges, motions, notices, pleas, releases, statements, testimony, verdicts, waivers, warrants, and writs.	a) Retain in office cases having precedential or historical value permanently. b) Destroy in office adjudicated cases 6 years after final disposition. c) Destroy in office non-adjudicated cases (out-of-court claims) 6 years after final disposition or expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a) G.S. 132-1.9
6.20	**OATHS OF OFFICE** SEE ALSO: Public Bodies: Member Files (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Transfer official copy of oath of office to the municipal clerk or the county clerk to the board of commissioners or the clerk of the governing board for permanent retention. *Retention Note: The Clerk should present a copy of the oaths of elected officials to the Clerk of Superior Court for recording.*	Authority: G.S. 105-349 G.S. 153A-26 G.S. 160A-61 G.S. 160A-68 G.S. 160A-284 Retention: G.S. 7A-103(2)
6.21	**PERMISSIONS** Records conferring legal permission. Includes copyright permission requests and requests for permission to publish intellectual property or holdings of the agency. Also includes copyrights, patents, and trademarks held by the agency.	a) Retain in office permanently records conferring perpetual legal permission as well as records documenting copyrights, patents, and trademarks held by the agency. b) Destroy in office 3 years after expiration records concerning one-time copyright permissions granted by the agency.	

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
6.22	**PRE-TRIAL RELEASE PROGRAM RECORDS** Records documenting supervision for defendants who do not pose a risk to the community as they await trial.	Destroy in office 3 years after trial.	
6.23	**RELEASE FORMS** Records documenting consent and waiving the individual's right to hold the agency responsible for injuries or damages occurring while voluntarily participating in events or activities.	Destroy in office 5 years after termination of release/waiver.	
6.24	**SETTLEMENTS** Records concerning pre-litigation or informal settlements.	Destroy in office 10 years after expiration.	Authority: G.S. 132-1.3
6.25	**VEHICLE TITLES** Titles of agency owned vehicles.	Dispose of in accordance with Division of Motor Vehicles procedures for title transfer upon disposition of vehicle.	Authority: G.S. 20-72

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STANDARD 7: PUBLIC RELATIONS RECORDS

Official records and materials created and accumulated by internal public relations programs operated by the agency.

ITEM #	*STANDARD 7: PUBLIC RELATIONS RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
7.01	**AGENCY PUBLICATIONS** Publications created at agency expense. Also includes correspondence and other related records regarding the design and creation of agency publications.	a) Retain in office records with historical value permanently. b) Destroy publications management records after 5 years. c) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	
7.02	**AUDIO-VISUAL RECORDINGS** @ Recordings (including digital) and films produced by or for the agency. This does not include recordings of public meetings or security videos. SEE ALSO: Public Bodies: Audio and Video Recordings of Meetings (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	
7.03	**COMMUNITY AWARDS** @ Records concerning awards by the agency recognizing community contributions.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
7.04	**CONFERENCES AND WORKSHOPS** @ Records concerning conferences and workshops conducted by agency employees. Includes slides, charts, transparencies, handouts, and other related records used in presentations. SEE ALSO: Training and Educational Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
7.05	**EDUCATIONAL MATERIALS** Materials produced for usage by teachers or tour groups. Includes lesson plans, activities, and other related records.	Destroy in office when superseded or obsolete.	
7.06	**FUND DRIVE AND EVENT RECORDS** Records documenting the promotion and organization of fund drives and other special events in which the agency participated. Includes records concerning solicitations requesting and donations providing money or in-kind donations for agency programs. Also includes invitations, registration materials, agendas, handouts, presentations, and programs. SEE ALSO: Donations and Solicitations (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
7.07	**INVITATIONS** Invitations sent and received concerning agency and external functions.	Destroy in office after event occurs.	
7.08	**MEDIA FILE** Reference copies of newspaper, magazine, and other media clippings concerning the agency, agency officials, and other topics of interest.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
7.09	**POPULAR ANNUAL FINANCE REPORT** Comprehensive annual financial report (CAFR)	a) Retain records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
7.10	**PUBLIC HEARINGS** Includes agendas, minutes, notices, speaker sign-up sheets, and similar documentation. SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office minutes permanently. b) Destroy in office remaining records after 1 year.	

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ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
7.11	**PUBLIC RECORDS REQUESTS** Formal requests submitted by persons seeking access to agency records along with documentation of agency response.	Destroy in office 2 years after resolution.* *Note: These disposition instructions apply only to the request, internal agency records related to searching for and preparing responsive records, and communication of response; the documents that are responsive to public records requests should be handled according to their respective disposition instructions. However, if the agency also retains separate copies of the documents that are responsive to public records requests, they may also be destroyed 2 years after completion of the request.*	
7.12	**PUBLICITY RECORDS** @ Records concerning overall public relations of agency. Includes advertisements, announcements, correspondence (including e-mail), photographic materials, news and press releases, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.*	
7.13	**SOCIAL MEDIA** SEE ALSO: Website (Electronic) (below).	See **APPENDIX** (page A-12) for guidance in handling social media.	
7.14	**SPEECHES** Speeches made by agency officials.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

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ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
7.15	**WEBSITE (ELECTRONIC)** Records created and maintained in paper and electronic formats concerning the creation and maintenance of the agency's presence on the World Wide Web. Includes correspondence (including e-mail), procedures, instructions, website designs, HTML/XHTML, or other web-based file formats, and other related records. SEE ALSO: Web Management and Operations Records: Structure (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Capture website annually or whenever a major revision in design and/or content has taken place, whichever occurs first. Retain captured content in office permanently. Can be maintained as website snapshots or via Web crawler. b) Destroy in office remaining records when superseded or obsolete.	

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STANDARD 8: RISK MANAGEMENT RECORDS

Official records created and accumulated to manage risks in the agency.

ITEM #	*STANDARD 8: RISK MANAGEMENT RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
8.01	**ACCIDENT/INCIDENT REPORTS (CUSTOMER AND EMPLOYEE)** SEE ALSO: Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Transfer records resulting in workers' compensation to Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS). b) Destroy in office remaining employee claims 3 years after settlement or denial of claim.* c) Destroy in office adult non-employee reports 3 years after settlement or denial of claim.* d) Destroy in office reports that do not result in claims or official action after 3 years. e) Destroy in office reports of minors after minor has reached age of 21.	
8.02	**DECLARATIONS AND TERMINATIONS OF STATES OF EMERGENCY**	Retain in office permanently.	Authority: G.S. 166A-19.22

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
8.03 	**DISASTER AND EMERGENCY MANAGEMENT PLANS** @ Records concerning preparedness, evacuations, and operations in the event of a disaster (natural, accidental, or malicious). Includes background surveys, studies, reports, and records concerning the process of notifying personnel in the event of an emergency. Also includes Continuity of Operations Plans (COOP) and Business Continuity Plans (BCP).	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-1.7
8.04	**DISASTER RECOVERY** Administrative records documenting and recovery efforts for emergencies of a short duration as well as disasters inflicting widespread destruction and having long-term consequences for the agency. Includes documents coordinating activities with federal, state, and local emergency management, incident reports, inventories, and disaster relief allocations.	a) Retain in office permanently records documenting major agency disaster recovery efforts and records evaluating emergency response and efficacy. b) Destroy in office after 3 years records concerning minor or routine agency recovery operations that are managed with minimal disruption to normal operations.	
8.05	**EMERGENCY DRILLS AND EQUIPMENT RECORDS** Includes test records for fire suppression, defibrillator, respirator fit, and other emergency equipment. Also includes records concerning agency emergency and fire drills.	Destroy in office when superseded or obsolete.	
8.06	**EMERGENCY NOTIFICATIONS** Notifications and alerts sent to residents by Emergency Management or other agency staff regarding a current emergency.	Destroy in office after 1 year.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See* ***AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,*** *page A-5.*

± *The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.*

@ *In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.*

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
8.07	**EMPLOYEE SECURITY RECORDS** Records concerning the issuance of keys, identification cards, parking assignments, passes, etc., to employees. SEE ALSO: Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office when superseded or obsolete.	
8.08	**FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS** Records concerning agency safety measures. Includes reports, logs, and other related records documenting inspections of agency facilities.	a) Destroy in office inspection reports after 7 years. b) Destroy in office safety audits after 3 years. c) Destroy in office remaining records when superseded or obsolete.	
8.09	**FIXED NUCLEAR FACILITIES PLANS FILE** Records concerning emergency plans for county fixed nuclear facilities.	Destroy in office when superseded or obsolete.	
8.10	**FUEL OIL STORAGE TANK RECORDS**	Destroy in office closure records 3 years after completion of permanent closure.	Authority: 40 CFR 280.34 Retention: 40 CFR 280.74

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
8.11	**HAZARDOUS MATERIALS MANAGEMENT** Records documenting agency efforts to prevent and mitigate exposure to hazardous materials. Includes risk assessments, management plans, and abatement/removal records. SEE ALSO: Safety Data Sheets (below). *Note: Title 10A of the NC Administrative Code provides guidelines about the records requirements for persons who receive, possess, use, transfer, own or acquire any sources of radiation within the State of North Carolina.*	a) Retain in office permanently records documenting hazardous waste disposal sites on agency property and documenting the use of pathogens and biological toxins (select agents) at the agency. b) Destroy in office asbestos records 1 year after building is demolished. *(Note: If building is sold, transfer records to new owner.)* c) Destroy in office after 5 years records concerning the receipt, maintenance, and disposal of radioactive materials. d) Destroy in office 3 years after superseded or obsolete records concerning hazard mitigation plans. e) Destroy in office records documenting environmental and hazardous waste remediation projects 5 years after project completion. f) Destroy in office remaining records after 30 years.	Retention: 29 CFR 1910.1001(j)(3)(ii)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
8.12	**INSURANCE POLICIES** Records concerning automobile, theft, fire, and all other insurance policies purchased by agency. Also includes insurance audits, claims reports, surveys, endorsements, certificates of insurance, and waivers.	a) Destroy in office records concerning automobile and other liability insurance policies 10 years after superseded or obsolete.* b) Destroy in office certificates of insurance after 1 year. c) Destroy in office self-insurer certificates 6 years from date of termination of policy or settlement of all claims. d) Destroy in office remaining records after 1 year after superseded or obsolete.	
8.13	**LOSS CONTROL INSPECTION REPORTS** Self-inspections to identify potential liabilities or hazards that may exist in agency owned buildings or property.	Destroy in office when superseded or obsolete.	
8.14	**LOST, STOLEN, OR DAMAGED PROPERTY REPORTS** Includes reports of property lost or stolen at agency. Also includes reports and employee narratives of vandalism to agency property.	Destroy in office after 2 years.*	
8.15	**NATIONAL FLOOD INSURANCE PROGRAM RECORDS** Records concerning the participation of a local government agency in FEMA's National Flood Insurance Program (NFIP). Includes floodplain management ordinances, maps, and other related records.	a) Retain in office permanently floodplain management ordinances. b) Destroy in office copies of flood insurance rate maps, elevation certificates, and elevation information when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
8.16	**OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION (OSHA)** Records concerning injury or illness, extent and outcomes, summary totals for calendar year, and OSHA forms. Includes ergonomic assessments for employees.	Destroy in office after 5 years.	Retention: 29 CFR 1904.33 29 CFR 1904.44
8.17	**SAFETY DATA SHEETS** Forms supplied to agencies from manufacturers and distributors of hazardous materials for materials held by the agency.	Destroy in office 30 years after materials have been disposed of according to manufacturer's instructions. *Retention Note: A data sheet for a mixture may be discarded if the new data sheet includes the same hazardous chemicals as the original formulation. If the formulation is different, both data sheets must be retained for 30 years. Data sheets may also be discarded if some other record identifying the substances used, where they were used, and when they were used is retained the required 30-year period.*	Retention: 29 CFR 1910.1020(d)(1)(ii)(B)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

STANDARD 9: WORKFORCE DEVELOPMENT RECORDS

Official records created and accumulated by the agency to manage workforce development programs. Relevant legislation includes the Comprehensive Employment and Training Act, the Job Training and Partnership Act, the Workforce Investment Act, and the Workforce Innovation and Opportunity Act.

ITEM #	*STANDARD 9: WORKFORCE DEVELOPMENT RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
9.01	**AUDIT/AUDIT RESOLUTIONS** Records concerning reports from financial and compliance audits conducted on Workforce Investment Act programs in accordance with OMB Circular A-133. Includes audit reports and correspondence concerning audits and audit resolutions for the local area. Also includes federal and state audits.	Destroy in office after 3 years.	Authority: OMB Circular A-133 29 CFR 97.26
9.02	**LOCAL AREA JOB TRAINING PLAN RECORDS** Records concerning the local board's bid process for contracting workforce development programs.	Destroy in office when superseded or obsolete.	Authority: 20 CFR 652.8
9.03	**PARTICIPANT RECORDS** Records concerning applicants, registrants, eligible applicants/registrants, participants, terminees, and employees who submit requests for services of the Dislocated Workers Program and Workforce Investment Act programs. Includes applications, client history, Employability Development Plans, program referral, monitoring notes, pay authorizations, release forms, and Workforce Investment Act follow-up questionnaires.	Destroy in office 3 years after close of audit/final year expenditure.*	Authority: 20 CFR 652.8

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION,** page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this "records retention and disposition schedule"?

A. This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

A. This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.

Q. Am I required to have all the records listed on this schedule?

A. No, this is not a list of records you must have in your office.

Q. What is "reference value"?

A. Items containing "reference value" in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase "destroy in office when reference value ends" in the disposition instructions.

Q. Do the standards correspond to the organizational structure of my agency?

A. Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule's organization is to provide an easy reference guide for the records created in your agency.

Q. What if I cannot find some of my records on this schedule?

A. Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-19) can be used for such requests.

Q. What are public records?

A. The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:

> "Public record" or "public records" shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or characteristics, made or received pursuant to law or ordinance in connection with the

transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (State or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the State or of any county, unit, special district or other political subdivision of government.

Q. Is any person allowed to see my records?

A. Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

> "Every custodian of public records shall permit any record in the custodian's custody to be inspected and examined at ± times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. … No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request."

Q. What about my confidential records?

A. Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.

Q. Am I required to make available to the public copies of drafts that have not been approved?

A. Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is "finished" or not.

Q. What do I do with permanent records?

A. Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of "*a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests** of persons"* (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.
- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records

available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.

- Adoptions, marriages, and divorces document changes in familial relationships. Though adoptions are confidential (not available for public inspection), they document changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

A. Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its constituents. Two criteria for determining historical value are inherent interest and extraordinary documentation:

- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
- Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of residents and organizations?
- Do they have a long-term impact on residents and organizations?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

A. Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

A. We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on page A-22. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. May I store our unused records in the basement, attic, shed, etc.?

A. Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?

A. Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. Aren't all our old records at the State Archives of North Carolina?

A. Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. I found some really old records. What should I do with them?

A. Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. Can I give my old records to the historical society or public library?

A. Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. Whom can I call with questions?

A. If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See Audits: Performance (STANDARD 1: ADMINISTRATIVE AND MANAGEMENT RECORDS) and Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as "record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use."[3]

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called "transitory records." The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the *General Records Schedule: Local Government Agencies*, their office's Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, "while you were out" slips, memory aids, etc.?

A. Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, "while you were out" slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the *General Records Schedule: Local Government Agencies* or your office's Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

A. Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

[3] Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

A. If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-signatures

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

A. Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are "Retain in office permanently," which means that those records must be kept in your offices forever.

Q. How do I destroy records?

A. After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:

1) burned, unless prohibited by local ordinance;
2) shredded, or torn so as to destroy the record content of the documents or material concerned;
3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

   The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

   The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

   — N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency's approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

A. Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. Am I required to tell anyone about the destructions?

A. We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, https://archives.ncdcr.gov/government/rm-tools).

Destructions Log

County/Municipality					
Division		**Section**		**Branch**	
Location(s) of Records					

Records Series	Required Retention	Date Range	Volume (file drawers or MB)	Media (Paper, Electronic)		Date of Destruction	Method of Destruction	Authorization for Destruction
				P	E			

ELECTRONIC RECORDS:
E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

A. E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

From the Department of Cultural Resources E-Mail Policy (Revised July 2009), available at the State Archives of North Carolina website

Other publications (available online at the State Archives of North Carolina website) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

A. We do not recommend printing e-mail for preservation purposes. Important metadata is lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

A. The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records "made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions" are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. We have an imaging system. Are we required to keep the paper?

A. You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's **Human-Readable Preservation Duplicate Policy** (N.C. Gen. Stat. § 132-8.2):

> Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. Computer storage is cheap. Can I just keep my computer records permanently?

A. The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?

A. There are numerous documents available on the State Archives of North Carolina website (https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years (see Leave Records, STANDARD 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

A. Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

A. The following types of geospatial records have been designated as having archival value:

- Parcel data
- Street centerline data
- Corporate limits data
- Extraterritorial jurisdiction data
- Zoning data, address points
- Orthophotography (imagery)
- Utilities
- Emergency/E-911 themes

For more information, see **STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS**.

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

A. Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

A. Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at https://it.nc.gov/about/boards-commissions/gicc.

Q. Who should be responsible for creation and long-term storage of archived data?

A. The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

A. Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

A. The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.

Q. How do I start the process of backing up the above listed records?

A. We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the State Archives of North Carolina website) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "Transfer of Minutes in Digital Formats for Microfilming" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

A. Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. Can I obtain digital copies of the security preservation records?

A. Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

A. Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

A. We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.

Q. What can I do to prepare for an emergency?

A. We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.

Q. What are essential records?

A. Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:

- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
- **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as "rights-and-interests" records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

A. We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:

- Managing public records in North Carolina
- Disaster preparedness and recovery
- Confidentiality
- Organizing paper and digital files
- Digital communications

Q. Will you design a workshop especially for our office?

A. Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

A. No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public. To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (https://archives.ncdcr.gov/government/local/analysts).

Q. Is there a fee for workshops?

A. Not at this time.

Q. Are the workshops available in an online format?

A. We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see https://archives.ncdcr.gov/government/training/webinars. You can also find several online tutorials available on the State Archives of North Carolina website (https://archives.ncdcr.gov/government/training/online-tutorials-and-resources).

Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

☐ Add a new item
☐ Delete an existing item Standard Number _____ Page _____ Item Number _____
☐ Change a retention period Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records: Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by: _____
Signature Title Date

Approved by: _____
Signature Requestor's Supervisor Date

Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

In accordance with the provisions of N.C. Gen. Stat. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature Title Date

Approved by:

Signature Requestor's Supervisor Date

Concurred by:

Signature Assistant Records Administrator
State Archives of North Carolina Date

Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:	**Date (MM-DD-YYYY):**
Phone (area code):	**Email:**
County/Municipality:	**Office:**
Mailing address:	

Records Series Title A group of records as listed in records retention schedule	**Description of Records** Specific records as referred to in-office	**Inclusive Dates** (1987-1989; 2005-present)	**Approx. Volume of Records** (e.g. "1 file cabinet," "5 boxes")	**Retention Period** As listed in records retention schedule

Requested by: _____

Signature Title Date

Approved by: _____

Signature Requestor's Supervisor Date

Concurred by: _____

Signature Assistant Records Administrator, State Archives of North Carolina Date

File Plan

County/Municipality					
Division		**Section**		**Branch**	

Records Series	**Records Creator**	**Records Owner** (if record copy is transferred within the agency)	**Media** (Paper, Electronic, Scanned)			**Required Retention**	**Location(s) of Records**
			P	**E**	**S**		

Related Records Series Found in Local Agency Program Schedules

In some limited cases, records series with similar names and/or functions that are created and maintained by local government entities have not been superseded by the *General Records Schedule: Local Government Agencies*. These records series are described as unique records series in one of the local program retention schedules issued separately by DNCR for use by specific local agencies. This duplication occurs when records with similar names and/or functions have different retention guidance due to statutory, legal, evidentiary, or fiscal requirements. An example of this is the accounts receivable records series. In the *General Records Schedule*, the Accounts Receivable records series has a disposition instruction of "Destroy in office 3 years after collection." In the *Local Health Departments Schedule*, the Accounts Receivable: Clinical Services records series also includes the disposition instruction, "Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions." In both cases, the records series documents the money received by the local agency, however, the retention requirements for the Accounts Receivable: Clinical Services differ due to specific retention requirements concerning the management and dispersal of grant funds.

The purpose of this table is to provide a source for determining if the general records series item listed in the *General Records Schedule: Local Government Agencies* covers the function and/or retention requirements associated with the records created by your agency or if a specific program schedule applies. This table provides pointers to the relevant records series that can be found in one or more of the local agency program schedules.

Here's how to use the table:

- The records series found in the left-most column are listed and described in the *General Records Schedule: Local Government Agencies* and appear in this schedule with a @ beside them.

  ACCOUNTS RECEIVABLE @

  Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.

- The middle column lists similar records series from one or more of the schedules that have been issued separately for use by specific local agencies.
- The right-hand column lists the local agency program schedule that includes the records series listed in the middle column. The agencies represented in the right column include, but are not limited to, local health departments, Registers of Deeds, Sheriff's offices, local social services agencies, and tax offices.

If you need further information, please contact a Records Management Analyst.

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable	Accounts Receivable: Clinical Services	Local Health Departments Schedule

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable (cont.)	Accounts Receivable – Client Services	LME Schedule LME-MCO Schedule
Administrative Directives, Regulations, and Rules	State Board of Elections Numbered Memos	County Board of Elections Schedule
Audits: Financial	Clinical Record Audits	Local Health Departments Schedule
	Clinical Record Audits	LME Schedule
	Clinical Record Audits	LME-MCO Schedule
Audits: Performance	Pharmacy Audit Records	Local Health Departments Schedule
Blueprints and Specifications	Blueprints and Specifications Project Records – Core	Local Government Agencies Program Schedule
Community Awards	Student Awards and Honors Records	Local Public School Unit Schedule
Conferences and Workshops	Health Promotion Training Records	Local Health Departments Schedule
Constituent Comments, Complaints, Petitions, and Service Requests	Animal Complaint Records Illegal Dumping File Violations: Building and Housing Violations: Solid Waste Management Complaints (Law Enforcement)	Local Government Agencies Program Schedule
	Complaints	County Sheriff's Office
	Complaints: All Service Areas	County Social Services Agencies Schedule
	Animal Complaints	Local Health Departments Schedule
	Complaints File	LME Schedule
	Complaints File	LME-MCO Schedule
Contracts, Leases, and Agreements	School Health Provider Contracts	Local Health Departments Schedule
	Petroleum Leases Register	Register of Deeds Schedule
Disaster and Emergency Management Plans	Public Health Emergency Preparedness and Response Records	Local Health Departments Schedule
Equipment and Vehicle Maintenance, Repair, and Inspection Records	Equipment and Instrument Maintenance and Repair File	Local Health Departments Schedule
	Autopsy and Surgical Pathology: Instrument Maintenance Records Clinical Laboratory Records: Instrument Maintenance Records Cytology Records: Instrument Maintenance Records File Instrument Maintenance File	Public Hospitals Schedule

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Grants Grants: Financial	CDBG Records CDBG Outstanding Loan Balances CDBG Subject to Reversion of Assets Provisions or Change of Use of Real Property Continuum of Care Records Emergency Solutions Grants Records Home Investment Partnerships Program Records Housing Assistance for Persons with Disabilities Housing Opportunities for Persons with AIDS Records	Local Government Agencies Program Schedule
Indices	Board of Adjustment Case Files and Indexes Conditional Use Permit Records and Index Rezoning Records and Indexes	Local Government Agencies Program Schedule
	Master Client Identification File (Master Client Index)	LME Schedule LME-MCO Schedule
	Master Patient Index	Public Hospital Schedule
	Armed Forces Discharges and Index Chattel Mortgages and Index Corporations (Incorporations) Records and Index Deeds, Record of and Index Deeds of Trust (Mortgages), Record of and Index Highway Right-of-Way Maps and Index Land Sold for Taxes and Index Merchant Returns and Index Mineral Rights Records and Index Notaries Public Records and Index Official Record Book and Index Partnerships and Assumed Names Records and Index Plats, Maps, and Index Registration of Titles (Torrens Act) and Index Surveys, Record of and Index Timber Marks and Index Vital Records: Births and Index Vital Records: Deaths and Index Vital Records: Delayed Births and Index	Register of Deeds Schedule
Inventories	Drug Inventories	Local Health Departments Schedule

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Inventories (cont.)	Drugs Inventories	Public Hospitals Schedule
Maps: All Other	Utilities: Maps (Utility Installations & Distributions)	Local Government Agencies Program Schedule
	Plats, Maps, and Index	Register of Deeds Schedule
	Maps (Utility Installations and Distributions)	Water and Sewer Authorities and Sanitary Districts Schedule
Policies and Procedures	Clinical Policies and Procedures Laboratory Procedures Manual Behavioral Health Program Policy and Procedure Records	Local Health Departments Schedule
	Laboratory Procedures/Protocol File	Public Hospitals Schedule
Poll List/Registration List/Roster/Authorization to Vote (ATV)	Poll List/Registration List/Roster/Authorization to Vote (ATV)	County Board of Elections Schedule
Projects	Appraisal Project File Project Records – Cancelled Project Records – Core Project Records – Engineering & Compliance	Local Government Agencies Program Schedule
	State Board of Elections Correspondence and Reports	County Board of Elections Schedule
	Water and Wastewater System Project Records	Waste and Sewer Authorities and Sanitary Districts Schedule
Publicity Records	Student Publicity Records	Local Public School Unit Schedule
Rate and Fee Schedules	Fee Schedules	Local Health Departments Schedule
	Fee Schedules	LME Schedule
	Fee Schedules	LME-MCO Schedule
Recordings: Customer Call Center Recordings Audio-Visual Recordings	Traffic Video Recordings and Data Law Enforcement Audio and Video Recordings Communication Records Electronic Recordings of Interrogations	Local Government Agencies Program Schedule
	Audio and Video Recordings Communication Records Electronic Recordings of Interrogations (Juvenile and Homicide)	County Sheriff's Office

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies	Land Development and Planning Studies and Reports Ambulance Call Reports/Patient Care Reports North Carolina Fire Incident Report Pool Records Environmental: Customer Usage Records Environmental: Discharge Monitoring Reports Environmental: Landfill Monitoring Reports Environmental: Reports Submitted to U.S. Environmental Protection Agency Utilities: Daily Water and Wastewater Facility Operators Logs Utilities: Service Interruption Records Utilities: Wastewater Maintenance Operation Reports Water Quality: Pretreatment Program Records Water Quality: Public Water Sanitary Survey Records Appraisal Reports Traffic Analysis Project Records – Core Project Records – Engineering & Compliance Alarm Call Reports Arrest Reports Chemical Analysis Records Crime Analysis Records Detention Facility Incident Reports Detention Facility Physical Force Records Incident Response Reports Inmate Death Reports Laboratory Case Records Multiple Firearms Sales Reports Multiple Firearms Sales Reports Destruction Records Traffic Accident Reports	Local Government Agencies Program Schedule

(continued on following page)

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies (cont.)	Daily Store Reports Monthly Law Enforcement Activity Reports Monthly Operating Report to Board Receiving Report Sales Reports Stock Difference Reports Weekly Warehouse Reports	Alcoholic Beverage Control Boards Schedule
	Campaign Contribution and Expenditure Reports Ballot Reports State Board of Elections Correspondence and Reports Voter Registration Lists and Reports	County Board of Elections Schedule
	Alarm Call Reports Arrest Reports Detention Facility Incident Reports DWI Reports Incident Response Reports Inmate Death Reports Traffic Accident Reports	County Sheriff's Office
	Program Time and Activity Reports Medicare Disbursement Reports Communicable Disease Reports Test Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Local Health Departments Schedule
	Medicare Disbursement Reports	LME Schedule LME-MCO Schedule
	Admission/Discharge/Transfer Reports Communicable Disease Reports Call-In Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Public Hospitals Schedule

(continued on following page)

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies (cont.)	Certified Facility Operators Logs and Reports Discharge Monitoring Reports Periodic Inspection Reports of Industrial Facilities Wastewater Maintenance Operation Reports	Waste and Sewer Authorities and Sanitary Districts Schedule
Strategic Plan	Land Development and Planning Studies and Reports Parks Planning File Comprehensive Plan and Amendments Environmental: Comprehensive Solid Waste Management Plan and Amendments Planning File (Street Maintenance)	Local Government Agencies Program Schedule

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RECORDS RETENTION AND DISPOSITION SCHEDULE

PROGRAM RECORDS SCHEDULE:
LOCAL GOVERNMENT AGENCIES

Issued By:

NC DEPARTMENT OF
NATURAL AND CULTURAL RESOURCES

North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

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Program Records Schedule:
Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 Program Records Schedule: Local Government Agencies**:

10. Airport Authority Records
11. Animal Services Records
12. Code Enforcement and Inspection Records
13. Emergency Medical Services and Fire Department Records
14. Parks and Recreation Records
15. Planning and Regulation of Development Records
16. Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records
17. Public Transportation Systems Records
18. Public Utilities and Environmental/Waste Management Records
19. Street Maintenance, Public Works, and Engineering Records
20. Law Enforcement Records (excluding Sheriff's Offices)
21. Tax Records (for municipalities)

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

N.C. Gen. Stat. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

"(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means."

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, N.C. Gen. Stat. § 132-6.1(a) specifies:

> "Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software."

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when "*reference value ends."* All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction *"destroy when reference value ends."* If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction *"destroy when reference value ends."*

Record Copy

A record copy is defined as "The single copy of a document, often the original, that is designated as the official copy for reference and preservation."[1] The record copy is the one whose retention and disposition is mandated by these schedules; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social

[1] Society of American Archivists, *Dictionary of Archives Terminology*.

media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as "record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use."[2]

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, "while you were out" slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.

Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary's seal), they must be retained according to the disposition instructions for the records series encompassing the forms' function.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. These schedules supersede previous versions of these schedules and any localized amendments; they are to remain in effect from the date of approval until they are reviewed and updated.

[2] Ibid.

APPROVAL RECOMMENDED

_____	Sarah E. Koonts
Municipal/County Clerk or Manager	Sarah E. Koonts, Director
Title: _____	Division of Archives and Records

APPROVED

_____	D. Reid Wilson
Head of Governing Body	D. Reid Wilson, Secretary
Title: _____	Department of Natural and Cultural Resources

County/Municipality: _____

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the *General Records Schedule: Local Government Agencies* and, therefore, are not listed separately here.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.
- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-19) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.

 – symbol designating that one or more records in this series may be confidential or Includes confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – "a group of similar records that are . . . related as the result of being created, received, or used in the same activity." (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTIONS, page A-5.

STANDARD 10: PROGRAM OPERATIONAL RECORDS – AIRPORT AUTHORITY RECORDS

Official records and materials created and accumulated incidental to the operation of a county or municipal airport.

ITEM #	*STANDARD 10: AIRPORT AUTHORITY RECORDS*		
	RECORDS SERIES TITLE	*DISPOSITION INSTRUCTIONS*	*CITATION*
10.01	**ACCESS CONTROL RECORDS** Records concerning employee or contractor access to facilities or resources.	Destroy in office 1 year after expiration.	
10.02	**AIR SPACE CONSTRUCTION** Applications to construct structures which may obstruct flight space. Includes correspondence and related records.	Destroy in office after 5 years.	
10.03	**AIRFIELD INSPECTION** Records concerning airfield inspections on runway conditions, fueling agents, fire and rescue facilities, ground vehicle control and other airport condition information.	Destroy in office after 1 year.	Authority/Retention: 14 CFR 139.301
10.04	**AIRPORT MASTER RECORD** Federal Aviation Administration (FAA) form 5010 documenting basic information concerning airports.	Destroy in office when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.05	**LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS** Records documenting local government and airport authority land use and development planning.	Retain in office permanently.	
10.06	**RADIO LOGS** Records of radio calls received and placed.	Destroy in office after 1 year.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 11: PROGRAM OPERATIONAL RECORDS – ANIMAL SERVICES RECORDS

Records created and received during the conduct of animal services programs.

NOTE: Some records are covered by General Records Schedule: Local Government Agencies and, therefore, are not listed separately here. See Reference (Reading) File and Reports and Studies (Administration and Management Records).

ITEM #	*STANDARD 11: ANIMAL SERVICES RECORDS*		
	RECORDS SERIES TITLE	*DISPOSITION INSTRUCTIONS*	*CITATION*
11.01	**ANIMAL ABUSE AND CRUELTY RECORDS** Includes complaints, citations and/or compliance orders, and other related records.	Destroy in office after 5 years.*	See G.S. 14-360 for definition of animal cruelty.
11.02	**ANIMAL COMPLAINT RECORDS** Includes complaints of animal nuisances.	Destroy in office after 3 years.*	
11.03	**ANIMAL CONTROL RECORDS** Records of animal control calls. Includes information regarding animal bites, animals received from residents, strays caught, animals taken to shelter or returned to owner, use of tranquilizer guns, and other related records. Also includes citations and/or compliance orders issued to animal owners for violations of government ordinances.	a) Destroy in office records concerning dangerous animals when known dead or after 10 years. b) Destroy in office animal control citations and compliance orders after 3 years.* c) Destroy in office remaining records after 1 year.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
11.04 	**ANIMAL LICENSING RECORDS** Records concerning the licensing of dogs, cats, and other animals. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Confidentiality: G.S. 132-1.2 (2)
11.05 	**ANIMAL SHELTER RECORDS** Records of animals impounded at the shelter, including date of impoundment, length of impoundment, disposition of animal, and any other information required by rules adopted by the State Board of Agriculture. Also includes certificates of animal release (e.g., adoption, reclaim, transfer, return to field) and owner contact records.	Destroy in office 3 years after date of impoundment.	Authority/Retention: G.S. 19A-32.1(j) Confidentiality (for specific counties): G.S. 132-1.15
11.06	**CONTROLLED SUBSTANCE EUTHANASIA LOG** Includes amount of controlled substances used.	Destroy in office after 2 years.	Retention: 21 CFR 1304.04
11.07	**HISTORIES OF PET OWNERS** Records concerning information for each animal owner who violates government ordinances. Includes complaint forms and other related records.	Destroy in office after 3 years.*	
11.08	**RABIES VACCINATION RECORDS** Includes rabies vaccination certificates submitted to agency by area veterinarians.	Destroy in office after 3 years.	Authority: G.S. 130A-189

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 12: PROGRAM OPERATIONAL RECORDS – CODE ENFORCEMENT AND INSPECTION RECORDS

Official records and materials created and accumulated during the conduct of local government code enforcement and inspection programs.

NOTE: Some records are covered by the General Records Schedule: Local Government Agencies and, therefore, are not listed separately here.

ITEM #	*STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS*		
	RECORDS SERIES TITLE	*DISPOSITION INSTRUCTIONS*	*CITATION*
12.01	**AIR POLLUTION SOURCE INFORMATION** Includes records for facilities which are no longer operational.	Destroy in office after 2 years.*	
12.02	**BLUEPRINTS AND SPECIFICATIONS** Records concerning blueprints and specifications of local government owned buildings and facilities, or drawings submitted when applying for a building permit for new construction. Includes as-built plans and related records concerning approved changes or used in determining code compliance and enforcement of building code. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain agency blueprints and specifications for life of structure. b) Destroy in office commercial blueprints and specifications 1 year after completion of project. c) Destroy in office residential blueprints and specifications when reference value ends.± Agency Policy: Destroy in office after _____	Confidentiality: G.S. 132-1.7

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
12.03	**BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS** Records documenting applications for permits from property owners to erect new structures or manufactured homes, or to make structural modifications, demolition, fire permits, or the installation of plumbing, electrical, or mechanical systems. Includes permits, inspection reports, inspector's worksheets, inspection requests, denial reports, sketches, correspondence (including e-mail), and contractor change forms.	a) Destroy in office permits, applications, and inspection reports (or worksheets) 6 years after Certificate of Occupancy is issued or project is complete (inactive). b) Destroy in office Certificate of Occupancy 6 years after permit is expired. c) Destroy in office remaining records, including applications for which a permit was never issued, when reference value ends.± Agency Policy: Destroy in office after _____	
12.04	**CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS** Records concerning decontamination compliance.	Destroy in office 3 years after documented decontamination is complete.	
12.05	**DROUGHT CONTINGENCY PLANS** Includes water conservation plans in the event of a drought.	Destroy in office when superseded or obsolete.	
12.06	**EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES** Includes settled legal matters and penalties. SEE ALSO: Violations: Building and Housing, below.	Destroy in office 6 years after settlement.*	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.07	**EROSION AND SEDIMENT CONTROL PLANS** Includes approved and disapproved plans as well as revisions and addenda.	a) Destroy in office approved plans 6 years after approval or last revision and/or addendum. b) Destroy in office non-approved plans after 3 years.	
12.08	**EXEMPTION (VARIANCE) RECORDS** Records concerning exemptions and variances concerned with the installation of water, sewer, gas, or electric lines.	a) Destroy in office 5 years after expiration.* b) Destroy in office records for which an exemption or variance was not issued after 3 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.09	**GOING-OUT-OF-BUSINESS LICENSES** Records concerning licenses granted to business to hold going out of business, water and smoke damage, and distress sales.	Destroy in office 1 year expiration.	
12.10	**GROUNDWATER MONITORING RECORDS** Includes all groundwater monitoring wells and associated groundwater surface elevations.	Destroy in office after 5 years.*	Authority: 15 NCAC 2C .0100
12.11	**ILLEGAL DUMPING FILE** Records concerning illegal dumping complaints received. SEE ALSO: Violations: Solid Waste Management, below.	Destroy in office after 5 years.*	
12.12	**INSPECTIONS** Inspections conducted by local government agencies concerning enforcement of state and local laws, codes, and ordinances.	Destroy in office after 6 years.*	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.13	**LEAD AND COPPER COMPLIANCE RECORDS** Includes all monitoring records required by federal, state, and local regulations.	Destroy in office after 12 years.*	Retention: 40 CFR 141.91
12.14	**LANDFILL TONNAGE AND COST FILE**	Destroy in office after the 5 year reporting period is complete.	
12.15	**PERMITS: CONSTRUCTION** Records documenting applications and permits regarding sign installation, fencing, swimming pools, driveways, or similar activity required by local ordinance. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Miscellaneous (Non-Building) Applications, Licenses, and Permits (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 3 years after completion of project. b) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after _____	
12.16 	**PERMITS: PUBLIC UTILITIES PROJECTS** Records documenting permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain in office approval letters and supporting documentation permanently. b) Destroy in office permits 6 years after expiration, cancellation, revocation, or denial.*	Authority: 40 CFR 122.28 15A NCAC 18C .0300 Confidentiality: 15A NCAC 02H .0115

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.17	**RECREATIONAL VEHICLE REGISTRATION RECORDS** Records concerning issuance of registrations/decals for recreational vehicles. Includes, but is not limited to, golf carts, canoes, and mopeds as well as proof of insurance and renewals.	Destroy in office 1 year after expiration.*	
12.18	**UNSAFE BUILDINGS FILE** Records documenting inspections and notifications to owners of unsafe conditions relative to a particular structure. SEE ALSO: Violations: Building and Housing, below.	Destroy in office after 6 years provided all issues have been resolved.*	
12.19	**VALVE OPERATION FILE**	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after_____	
12.20	**VIOLATIONS: BUILDING AND HOUSING** Records documenting violations of building and fire code, minimum housing, and erosion and sediment control. Includes complaints, summons, notices, appeals, and other information created or compiled during the course of investigation and resolution of each alleged violation. SEE ALSO: Water Analysis, below.	a) Destroy building code violations in office 6 years after verification of correction. b) Destroy remaining records in office 3 years after verification of correction.*	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

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ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.21	**VIOLATIONS: SOLID WASTE MANAGEMENT** Includes complaints, notices of violations, citations, investigation records, court documents, and other related records issued by solid waste environmental enforcement programs.	Destroy in office 7 years after resolution of case.*	
12.22	**VIOLATIONS: WATER CONSERVATION** Records concerning notices of water conservation violations.	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after_____	
12.23	**WASTEWATER POLLUTION CONTROL AND ABATEMENT RECORDS**	Destroy in office after 5 years.*	Authority: 15A NCAC 2B .0505
12.24	**WASTEWATER QUALITY ANALYSIS RECORDS**	a) Destroy in office analysis reports after 3 years.* b) Destroy in office monitoring and calculation sheets after 1 year.*	Authority: 15A NCAC 2B .0505

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.25	**WATER ANALYSIS** Records concerning bacteriological, chemical, radiological, and physical analyses and climatological observations as well as records of actions taken to correct violations. SEE ALSO: Violations: Building and Housing and Violations: Water Conservations, above.	a) Destroy in office records of chemical and radiological analysis after 10 years. b) Destroy in office records of bacteriological and turbidity analysis after 5 years. c) Destroy in office records of actions taken to correct violations 3 years after last corrective action taken. d) Destroy in office remaining records after 5 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.26	**WATER SYSTEM OPERATIONS RECORDS** Records concerning the operations of water supply, treatment, distribution, and collection. Includes backflow prevention reports, flow reports, capacity studies, pump station reports, and similar records that summarize	Destroy in office after 10 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.27	**WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS FILE**	Destroy in office after 5 years.*	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 13: PROGRAM OPERATIONAL RECORDS – EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS

Official records documenting the primary functions of emergency services programs and fire departments.

Footage from body-worn cameras is scheduled by the content captured or the purpose of the footage rather than by its format. Recordings may fit under FIRE INVESTIGATION CASE FILES, DISPATCH RECORDS AND RECORDINGS, PUBLICITY RECORDS (General Schedule), TRAINING AND EDUCATIONAL RECORDS (General Schedule), and other items as appropriate. Footage is only confidential if it fits within an item where confidentiality is conferred by state or federal statute.

ITEM #	*STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
13.01 	**911 COMMUNICATION RECORDS AND RECORDINGS** Records documenting any communications made by the public with 911. Includes transcripts and recordings of 911 calls received, transcripts of text messages received by 911, and computer-aided dispatch (CAD) reports. SEE ALSO: Dispatch Records and Recordings, below AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS)	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.5 G.S. 132-1.4(c)(4) Retention: G.S. 132-1.4(i)
13.02 	**AMBULANCE CALL REPORTS (ACR)/PATIENT CARE REPORTS (PCR)** Records concerning equipment used, patient location, nature of call, vital signs and other physical signs, care rendered, medicine ordered, etc.	a) Transfer copy of report to the admitting hospital for inclusion into patient's medical record. b) Destroy original in office after 3 years.*	Confidentiality: G.S. 130A-12

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
13.03	**BUILDING AND FIRE SAFETY SYSTEM PLANS** Records concerning plans and fire safety systems of commercial, industrial, and government-owned properties.	Destroy in office when superseded or obsolete.	
13.04 	**DISPATCH RECORDS AND RECORDINGS** Records and recordings concerning activities during an emergency services dispatch. Includes company run reports and fire journals as well as ambulance dispatch and service run records. Also includes footage from body-worn cameras of EMS and Fire Department personnel when responding to an emergency if not otherwise included in a separate item. SEE ALSO: 911 Communication Records and Recordings, above AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS).	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.4 G.S. 143-518 45 CFR 164.501 42 U.S.C. 1395x
13.05	**FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE** Records documenting licenses and insurance certificates of companies that perform installations of fire alarm and automatic extinguishing systems.	Destroy in office when superseded or obsolete.	
13.06	**FIRE DISPATCH FILE** Records concerning fire dispatch zones. Includes maps of fire dispatch zones, census tract information, annexation research, street closings, and other related material.	Destroy in office when superseded or obsolete.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
13.07 	**FIRE INVESTIGATION CASE FILES** Records concerning investigations of fire. Includes reports, photographs, evidence, and other related records. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Case File: Felonies AND Case File: Misdemeanors (STANDARD 20: LAW ENFORCEMENT RECORDS).	a) Retain in office permanently when loss of life occurs or if a publicly-owned building is involved.* b) Destroy in office after 10 years when arson is involved.* c) Destroy in office after 5 years when cause of fire is determined to be accidental and no loss of life occurs.*	Confidentiality: G.S. 132-1.4
13.08	**FIRE SAFETY INSPECTIONS AND PERMITS** Records documenting inspections of and permits issued for fire protection measures and procedures for systems and buildings.	a) Destroy in office inspections with no defects after 3 years. b) Destroy in office inspections with noted defects 3 years after defects are corrected.* c) Destroy in office permits 3 years after expiration.	
13.09	**NORTH CAROLINA FIRE INCIDENT REPORT** Includes report required by state statute to document certain fire incidents. *For retention of copies of fire incident reports filed with other agencies, see:* GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Reports (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Retain original report permanently.	Authority/Retention: G.S. 58-79-45

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
13.10 	**PHARMACEUTICAL AND NARCOTICS RECORDS** Records documenting the administration of pharmaceuticals and narcotics to patients as required by the Drug Enforcement Agency.	Destroy in office after 3 years.*	Authority: 21 CFR 1310.03 Confidentiality: G.S. 130A-12 Retention: 21 CFR 1310.04

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 14: PROGRAM OPERATIONAL RECORDS – PARKS AND RECREATION RECORDS

Records created and received by Parks and Recreation departments.

ITEM #	*STANDARD 14: PARKS AND RECREATION RECORDS*		
	RECORDS SERIES TITLE	*DISPOSITION INSTRUCTIONS*	*CITATION*
14.01	**ADMISSION RECORDS** Records of admissions to parks or recreation facilities.	Destroy in office after 3 years.*	
14.02	**CITATIONS RECORDS** Citations issued by park personnel to persons who violate park rules and regulations.	Destroy in office after 2 years.	
14.03	**OFFICIALS FILE** Records concerning individuals who officiate games. Includes schedule and correspondence (including e-mail). SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) or Seasonal and Contract Worker Records (STANDARD 4: HUMAN RESOURCES RECORDS) for disposition of payment records.	Destroy in office after 3 years.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.04	**PARKS PLANNING FILE** Records concerning master plans and working plans for each park property and recreational facility which show layout, topography, and proposed developments and improvements. Includes drainage and resource maps, aerial maps, site analysis drawings, construction plans, and as-built drawings. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS) AND GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Parks (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS (GIS) RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends.± Agency Policy: Destroy in office after _____ b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	
14.05	**POOL RECORDS** Records concerning monthly reports indicating operational data, chemicals used, chlorination levels and other information relating to pool construction, maintenance, and health and safety.	Destroy in office after 1 year.	
14.06 	**RECREATION PROGRAMS** Records concerning athletic and recreation programs. Includes staff notes, lesson plans, course descriptions, instruction manuals, schedules, team rosters, reservation records, copies of receipts for fees paid, age verification records, and concession operators list.	a) Destroy in office program records after 3 years. b) Destroy age verification records when reference value ends.± Agency Policy: Destroy in office after_____	Confidentiality: G.S. 132-1.12

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.07	**TICKET STUBS**	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after_____	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 15: PROGRAM OPERATIONAL RECORDS – PLANNING AND REGULATION OF DEVELOPMENT RECORDS

Official records and materials created and accumulated during the conduct of local government planning, regulation of development, and zoning programs.

Community Development Block Grants (CDBG) records are found in Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

ITEM #	*STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
15.01	**BOARD OF ADJUSTMENT CASE FILES AND INDEXES** Cases submitted to the board requesting variances from current zoning ordinances. Includes indexes to cases reviewed by the board.	a) Retain indices in office permanently. b) Destroy in office case files after 6 years.*	Retention: G.S. 1-50(5)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.02	**CERTIFICATES OF APPROPRIATENESS** Certificates submitted by the Historic Preservation Commission allowing alterations to exterior portions of building and structures on or within historic landmarks and districts. Includes applications and other related records.	a) Retain in office certificates for life of structure and then destroy. b) Destroy in office denied applications when reference value ends. ± Agency Policy: Destroy in office after _____ c) Destroy in office remaining records when reference value ends. ± Agency Policy: Destroy in office after _____	Authority: G.S. 160A-400.9
15.03	**COMPREHENSIVE PLAN AND AMENDMENTS** Official copies of comprehensive plan and all background surveys, studies, reports, draft versions of plans, and supporting documentation. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently adopted plan and amendments. b) Destroy in office remaining records 3 years after adoption of plan.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.04	**CONDITIONAL USE PERMIT RECORDS AND INDEX** Records concerning applications for conditional use permits. Permits allow for the construction of buildings, on the condition that impacts on neighborhoods are mitigated. Includes original application, blueprint drawings, investigative reports, planning commission recommendations, cash receipts, and related correspondence (including e-mail). Also includes reference copies of variances or exceptions from zoning regulations granted by the Board of Adjustment.	a) Destroy in office 3 years after discontinuance of use. b) Destroy in office applications for which a permit was never issued when reference value ends. ± Agency Policy: Destroy in office after _____	
15.05	**DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, COMMON AREAS, ETC.**	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____	Authority: G.S. 47C-2-103
15.06	**ENVIRONMENTAL IMPACT STUDIES** Records and reports concerning the environmental impact of major projects proposed by localities and reviewed by local officials.	Retain in office permanently.	
15.07	**OPEN SPACE CLASSIFICATION CASE FILE**	Retain in office permanently.	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.08	**PERMITS: TEMPORARY MANUFACTURED HOME** Records created to temporarily authorize the location of a manufactured home on the same lot as a single family residence.	Destroy in office 6 years after permit expires.	Retention: G.S. 1-50(5)
15.09	**PERMITS: ZONING COMPLIANCE** For residential uses, non-residential uses, and accessory structures.	a) Retain in office permits concerning subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office permits concerning subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other permits and related records 6 years after last entry.	Retention: G.S. 1-50(5)
15.10	**PETITION & REGULATION RECORDS**	Destroy in office after 5 years.*	

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.11	**PLANNING REVIEW CASE FILE** For required review of site plan, zoning variance, special permit, change of zoning, subdivision creation or enlargement, municipal or county planning action, or other required review; including, but not limited to, maps, plans, sketches, photographs, engineering reports, environmental impact statement and studies, copies of zoning records, project narrative, correspondence (including e-mail), and record of final determination.	a) Retain plan reviews and related records containing subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office plan reviews and related records containing subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other mandatory reviews and related records 6 years after last entry.	Retention: G.S. 1-50(c)
15.12	**REZONING RECORDS AND INDEXES** Records concerning applications to rezone property within the county or municipality. Includes original applications, review forms, maps of areas involved, copies of investigative reports, copies of relevant planning board minutes, notices of hearings, and development agreements.	Retain in office permanently.	

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.13	**SUBDIVISION RECORDS** Includes maps, plats, topographical data, names of streets, records of public utilities, action by council, etc. Also includes preliminary subdivision and group development site plans. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Plats (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS RECORDS).	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____	
15.14	**VARIANCES** Includes zoning variances, watershed variances, and subdivision variances.	Retain official copies permanently in the minutes of the Board of Adjustment or other governing body.	
15.15	**VIOLATIONS: ZONING** Records concerning notices of zoning violations.	Destroy in office after 6 years.*	Retention: G.S. 1-50(5)

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STANDARD 16: PROGRAM OPERATIONAL RECORDS – PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS

Official records and materials created and received by public housing authorities, redevelopment commissions, and entitlement communities operated by local government agencies. Where there is a local funding match required to qualify for grant programs, all records should be retained according to the grant requirements listed below.

NOTES: Some records, such as those for Section 8 assistance, are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here. See Bond Closing Records (Budget, Fiscal, and Payroll Records), Grants (Administration and Management Records), and Grants: Financial (Budget, Fiscal, and Payroll Records). 24 CFR Parts 50-58 lay out the environmental review responsibilities of entities but do not establish specific retention requirements, so these records should be handled in accordance with the requirements of the funding source.

ITEM #	*STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS*		
	RECORDS SERIES TITLE	*DISPOSITION INSTRUCTIONS*	*CITATION*
16.01	**APPRAISAL PROJECT FILE** Evaluations of properties and structures within proposed projects. File includes financial assessments of the worth of real estate and building within proposed project areas. File may also include assessments of architectural and historical significance and condition of the involved structures and real estate.	a) Retain records with historical value permanently. b) Destroy in office remaining records 5 years after completion of abandonment of project.*	

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.02	**COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS** Records concerning the administration of projects funded under the Community Development Block Grant (CDBG) program, including both direct grants and regrants. Includes applications, reports, audits, certificates, maps, and other related records.	a) Retain records with historical value permanently. b) Destroy in office rejected applications after 1 year. c) Destroy in office remaining records 4 years after execution of the closeout agreement for the grant.	Retention: 24 CFR 570
16.03	**COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES** Records concerning individual activities under the Community Development Block Grant (CDBG) program for which there are outstanding loan balances, other receivables, or continent liabilities. Includes reports, audits, and other related records.	a) For recipients, destroy in office 3 years after the receivables or liabilities have been satisfied. b) For subrecipients, destroy in office after such receivables or liabilities have been satisfied.	Retention: 24 CFR 570.502(a)(7)(i)(B)
16.04	**COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY** Records concerning real property which was acquired or improved in whole or in part using Community Development Block Grant (CDBG) funds. Includes reports, audits, and other related records.	a) For recipients, destroy in office 3 years after these provisions no longer apply to the activity. b) For subrecipients, destroy in office when these provisions no longer apply to the activity.	Authority: 24 CFR 570.503(b)(7) 24 CFR 570.505 Retention: 24 CFR 570.502(a)(7)(i)(B)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.05	**CONTINUUM OF CARE RECORDS** Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes required Federal compliance records, program records, financial records, and other related records.	a) Destroy in office records documenting the acquisition, new construction, or rehabilitation of a project site 15 years after the date site is first occupied/used. b) Destroy in office program participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. c) Destroy in office all remaining records after 5 years.	Retention: 24 CFR 578.103(c)
16.06 	**CRIMINAL RECORDS CHECKS** Records received by the local agency to screen applicants for admission to covered housing programs and for lease enforcement or eviction.	Destroy in office once the purpose for which the record was requested has been accomplished, including expiration of the period for filing a challenge to the PHA action without institution of a challenge or final disposition of any such litigation.	Confidentiality/ Retention: 24 CFR 5.903(g) 24 CFR 5.905(c)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.07 	**EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS** Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes case management records for program participants, required federal compliance records, program records, financial records, and other related records.	a) Destroy records supporting the expenditure of federal funds passed through NC Department of Health and Human Services (DHHS) on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records documenting renovation of an emergency shelter 10 years after the date that ESG funds are first obligated for the renovation. c) Destroy in office participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. d) Destroy in office all remaining records after 5 years.	Confidentiality: 24 CFR 576.500(x) Retention: 24 CFR 576.500(y)
16.08	**FAÇADE PROJECT FILES** Records documenting the re-granting of funds received by the agency to restore exteriors of architecturally important structures in project areas. Includes contracts, photographs, and correspondence.	Retain in office permanently.	

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.09	**HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS** Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes records concerning designation as a participating jurisdiction, program records, project records, Community Housing Development Organizations records, financial records, program administration records, records concerning other federal requirements, and other related records.	a) Destroy in office rental assistance records 5 years after termination of assistance.* b) Destroy in office written agreements 5 years after termination.* c) Destroy in office 5 years after the affordability period terminates records of individual tenant income verifications, projects rents and inspections, and documents imposing recapture/resale restrictions. d) Destroy in office records covering displacements and acquisition 5 years after final payment.* e) Destroy in office remaining records after 5 years.*	Authority/Retention: 24 CFR 92.508
16.10	**HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES** Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes verifications of disability, grant agreements, performance reports, and other related records.	Destroy in office 5 years after the end of the grant term.	Retention: 24 CFR 582.301(c) 24 CFR 583.305(c)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.11	**HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) RECORDS** Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes grant agreements, performance reports, and other related records.	Destroy in office after 5 years.	Authority/Retention: 24 CFR 574 24 CFR 5.106(d)
16.12	**LANDLORD MONITORING RECORDS** Records documenting monitoring of landlords of properties used in affordable or subsidized housing programs. Includes certifications and forms and other compliance-related records.	Destroy in office after 5 years.	
16.13	**REDEVELOPMENT PLANS** Records concerning redevelopment projects. Includes documentation of the review and certification process.	a) Retain in office permanently records concerning approved redevelopment projects. b) Destroy in office remaining records 2 years after rejection.	

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STANDARD 17: PROGRAM OPERATIONAL RECORDS – PUBLIC TRANSPORTATION SYSTEMS RECORDS

Records received and created by area transit systems and authorities necessary to meet all statutory requirements.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

Comply with requirements of the Federal Transit Administration's **Best Practice Procurement Manual**, Master Agreement MA(11) Section 8 manual.

ITEM #	*STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
17.01	**AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS** Includes driver's daily assignments, dispatch records, logs of passenger pick-ups and drop-offs, manifests, trip requests, and appeal forms.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.02	**AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS** Vouchers submitted by private transportation companies for reimbursement for alternative transportation of public transit clients.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.03	**AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS**	Destroy in office after 1 year.	Authority: 2 CFR 200.333

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

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ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
17.04	**APPLICATIONS FOR ART-IN-TRANSIT** Applications and supporting documentation submitted by regional and national artists for exhibit on agency property.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
17.05	**APPLICATIONS FOR DISCOUNT PASSES** Applications, certificates of disability, and supporting documentation used to apply for discount passes.	Destroy in office 3 years after service is terminated or denied.	
17.06	**APPLICATIONS FOR TRANSIT SERVICE** Includes customer applications, eligibility assessment records, correspondence (including e-mail), health information, riders' guides, and related records.	Destroy in office 3 years after service is terminated or denied.	
17.07	**CUSTOMER (RIDER) IDENTIFICATION RECORDS** Records concerning customer identification, approvals, denials, and related information.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
17.08	**DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS** Includes company's articles of incorporation, financial statements, signed affidavits, letters of reference, declarations, Federal Schedule A or B, and related correspondence (including e-mail).	a) Destroy in office company-specific records 5 years after company is removed from certified list. b) Destroy in office related DBE program records, including Federal Transit Administration reports, 5 years from date record was created.	Authority: 2 CFR 200.333
17.09	**OPERATOR SHIFT INSPECTION RECORDS** Reports and similar records of operator's inspections of vehicle at the beginning and end of shift.	Destroy in office after 5 years.	Authority: 2 CFR 200.333

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ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.10	**ROUTE HISTORY RECORDS** Includes descriptions of routes, bus stops, passenger lists, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
17.11	**SEAT BELT AND RESTRAINT SYSTEM RECORDS** Records concerning the use and installation of seat belts and other restraint systems in vehicles.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
17.12	**TRANSIT SCHEDULES** Printed route schedules and related information used to generate schedules.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	
17.13	**VANPOOL DRIVER APPLICATIONS** Applications and supporting records submitted by persons operating vanpool vehicles.	a) Destroy in office accepted applications 3 years after person leaves program. b) Destroy in office applications for persons not accepted for program after 1 year.	

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STANDARD 18: PROGRAM OPERATIONAL RECORDS – PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS

Official records and materials created and accumulated for use by municipal and county sanitation, water, sewage, electrical, and gas operations. Also contains environmental management records accumulated for use by erosion and sediment control, flood control, and monitoring of pollution. Comply with applicable provisions of G.S. §132-1.7 regarding confidentiality of public infrastructure detailed plans and drawings.

ITEM #	*STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
18.01	**ENVIRONMENTAL: COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN AND AMENDMENTS** SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____ b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Authority: G.S. 130A-309.09A
18.02	**ENVIRONMENTAL: CUSTOMER USAGE RECORDS** Includes reports, plans or similar records submitted by industrial users or publicly-owned treatment works concerning intended or actual use of the wastewater treatment system.	Destroy in office after 3 years.*	Retention: 40 CFR 403.12(o)(3)
18.03	**ENVIRONMENTAL: DAILY DISPOSAL TICKETS** Record and/or receipts concerning the disposal of materials at the landfill.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.04	**ENVIRONMENTAL: DISCHARGE MONITORING REPORTS** Includes discharge and non-discharge monitoring reports submitted to state and/or federal regulatory agencies. Also includes copies of monthly reports required by National Pollution Discharge Elimination System (NPDES) permits.	a) Destroy in office NPDES reports 5 years from date of submission.* b) Destroy in office annual reports 5 years from date of submission.* c) Destroy in office daily reports after 3 years.	Retention: 40 CFR 122.41(3)(j)(2) 15A NCAC 2B .0506
18.05	**ENVIRONMENTAL: LANDFILL MONITORING REPORTS** Gas and groundwater monitoring records and reports. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain official reports permanently. b) Destroy in office remaining records after 3 years.	Retention: 15A NCAC 13B .1626(10)
18.06	**ENVIRONMENTAL: LANDFILL OPERATIONAL PLAN** Describes the intended schedule of construction, description of on-site waste handling procedures during active life of the facility, contingency plans, description of maintenance of installed equipment, and any other information pertaining to the operation, maintenance, monitoring, or inspections as may be required by federal and state law.	Destroy when superseded or obsolete.*	Authority: G.S. 130A-309.09D

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.07	**ENVIRONMENTAL: LANDFILL PERMITS** Permits and related records of landfills owned or operated by agency. Includes amendments and hazardous waste management permits.	a) Retain construction and operation permit for life of system and then destroy. b) Destroy in office all other permits and related records after the 5-year reporting period is complete.	Retention: G.S. 130A-294 (b1) (4)
18.08	**ENVIRONMENTAL: NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR DISPOSAL FILE** Notices issued by agency concerning improper non-stormwater discharge or disposal. Includes improper disposal of waste or products, chlorinated pool discharge, vehicle maintenance facility runoff, food service waste, and other unregulated commercial and industrial discharges.	Destroy in office one year after resolution.	
18.09	**ENVIRONMENTAL: OUTSIDE WASTE CLEARANCE RECORDS** Records allowing parties outside the operator's jurisdiction to dispose of waste at landfill.	Destroy in office 3 years after expiration of agreement.	
18.10	**ENVIRONMENTAL: REPORTS SUBMITTED TO U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA)**	Destroy in office after 2 years.*	
18.11	**EROSION CONTROL: EROSION AND SEDIMENT AFFIDAVITS** Forestry and agricultural affidavits clarifying land use exempt from land-disturbing activity standards.	Destroy in office after 6 years.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.12	**EROSION CONTROL: EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS**	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____	
18.13	**EROSION CONTROL: EROSION AND SEDIMENT CONTROL INSPECTIONS** Inspections conducted by agency. Includes inspection requests, notices of violations, denial reports, sketches, plans, correspondence (including e-mail), and similar records concerning the construction, modification or demolition of existing and new roads and construction sites.	Destroy in office 6 years after final site inspection.*	
18.14	**EROSION CONTROL: EROSION AND SEDIMENT CONTROL PERMITS** Records concerning permits, including permit logs, issued for site construction.	a) Destroy in office records concerning approved permits 3 years after expiration of permit. b) Destroy in office non-approved permits after 3 years.	
18.15	**EROSION CONTROL: EROSION AND SEDIMENT CONTROL PLANS** Includes approved and disapproved plans submitted to agency. Includes revisions, addendums, and records delineating who is financially responsible for the project.	a) Destroy approved plans in office 3 years after expiration. b) Destroy non-approved plans after 3 years.	Authority: 15A NCAC 04B .0118

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.16	**EROSION CONTROL: TROUT BUFFER VARIANCES** Includes denials and waivers. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Variances (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).	a) Destroy in office 6 years after approval of permit. b) Destroy in office after 3 years plans for which a permit was not issued.	Authority: 15A NCAC 04B .0125
18.17	**FLOOD CONTROL: FLOOD CERTIFICATIONS** Records concerning lot reviews for construction projects submitted to agency. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Permits: Zoning Compliance (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).	Destroy in office when superseded or obsolete.	
18.18	**FLOOD CONTROL: FLOOD STUDIES** Reviews of stream crossings for construction projects submitted to agency.	Retain in office for life of structure and then destroy.*	
18.19	**UTILITIES: DAILY WATER AND WASTEWATER FACILITY OPERATORS LOGS** Records concerning water distribution and treatment.	a) Destroy in office records concerning the operation of wastewater treatment facilities after 5 years.* b) Destroy in office records concerning the operation of water treatment facilities after 3 years.*	Authority: 15A NCAC 18C .1301

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.20 	**UTILITIES: ELECTRIC POWER AND NATURAL GAS FACILITY ENGINEERING AND SYSTEM PLANS** Includes authorizations to construct, building plans, and specifications of privately owned utilities. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____ b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-1.7
18.21	**UTILITIES: ELECTRIC POWER AND NATURAL GAS PERMITS AND APPROVAL RECORDS** Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute and issued by agency.	a) Destroy in office permits 5 years after expiration, cancellation, revocation or denial.* b) Retain approval letters and supporting documentation permanently.	
18.22	**UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MAINTENANCE AND REPAIR RECORDS** Records documenting installation, location, specifications, and maintenance history of meters, lines, pipes, pumps, and similar system equipment.	Destroy in office 3 years after equipment is no longer owned and/or operational.	
18.23 	**UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MANAGEMENT PLANS** SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Retain in office for life of system and then destroy.	Confidentiality: G.S. 132-1.7

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.24	**UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT RECORDS**	a) Retain project pre-approval and final approval letters for life of system and then destroy. b) Destroy in office remaining records 5 years after project is completed.	
18.25	**UTILITIES: LANDLORD AGREEMENTS** Agreements to automatically transfer utility accounts to landlords when their tenant vacates a property.	Destroy in office 3 years after expiration of agreement.	
18.26 	**UTILITIES: MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS)** Includes maps, plats, charts, and similar records showing the location of water mains, valves, hydrants, meters, etc., throughout the system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps, All Other (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS).	Retain for life of system and then destroy.	Authority: 15A NCAC 18C .0300 Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.27	**UTILITIES: METER INSTALLATION, TESTING AND CALIBRATION RECORDS (ELECTRIC, WATER, GAS)** Includes records concerning the installation or planned installation of meters and connecting any facility to utility system owned or operated by the agency.	a) Destroy in office records verifying installation of meter 3 years after equipment is no longer owned and/or operational. b) Destroy in office notice to property owners of approval of utility installation after 2 years. c) Destroy in office remaining records after reference value ends.± Agency Policy: Destroy in office after _____	
18.28	**UTILITIES: PUBLIC UTILITIES INSPECTION FORMS** Records relating to the inspection of sanitation, electric, water, gas and sewer utilities submitted to or conducted by agency.	Destroy in office when superseded or obsolete.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.29 	**UTILITIES: PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR RECORDS** Includes records documenting installation, authorizations to construct, building plans, location, specifications, and maintenance history, for hydrants, pipes, pumps, valves, and similar system equipment. Includes drainage system maintenance and repair records.	a) Retain in office as built plans and specifications for life of system and then destroy. b) Destroy in office 5 years after equipment is no longer owned and/or operational if unlike replacement occurred. c) Destroy in office 3 years after equipment is no longer owned and/or operational if like replacement occurred. d) Destroy in office background surveys, studies, reports, drafts, and other records when superseded or obsolete.	Authority: 15A NCAC 18C .0300 15A NCAC 2H .0115 Confidentiality: G.S. 132-1.7
18.30	**UTILITIES: RECYCLING WATER RECORDS** Backwash recycling groundwater records.	Destroy in office when superseded or obsolete.	Authority: 40 CFR 141.76(d)
18.31	**UTILITIES: SERVICE INTERRUPTION RECORDS** Includes reports, logs, or similar records documenting service interruptions.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.32	**UTILITIES: TAP AND HOOK UP RECORDS** Applications, permits, contracts, logs, or similar records documenting location and installation of water and wastewater hookup and taps.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office denied applications and remaining records when reference value ends. ± Agency Policy: Destroy in office after _____	Confidentiality: G.S. 132-1.1(c)
18.33	**UTILITIES: WATER AND WASTEWATER PERMITS AND APPROVAL RECORDS** Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute for systems owned or operated by agency. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain approval letters and supporting documentation permanently. b) Destroy in office permits and other records 5 years after expiration, cancellation, revocation or denial.*	Retention: 15A NCAC 18C .0300 15A NCAC 2H .0115 40 CFR 122.28
18.34	**UTILITIES: WASTEWATER MAINTENANCE OPERATION REPORTS**	Destroy in office after 3 years.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.35	**WATER QUALITY: LABORATORY OPERATIONS RECORDS** Includes documentation of all analytical quality control practices, reporting units, forms, test methods, and related procedures pertaining to certification obtained by agency. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office samples, raw data, analysis reports and related documentation after 5 years.* b) Destroy in office records concerning certification 2 years after expiration, cancellation, revocation, or denial.*	Authority: 15A NCAC 02H .0805(7)(G) 15A NCAC 02H .1100
18.36	**WATER QUALITY: PRETREATMENT PROGRAM RECORDS** Includes annual pretreatment reports, records of monitoring activities and results, water quality records and other related documentation.	a) Destroy in office permits and supporting documentation 5 years after expiration, cancellation, revocation, or denial.* b) Destroy in office remaining records after 3 years.*	Retention: 15A NCAC 02H .0908(f)(1) 40 CFR 503.17
18.37	**WATER QUALITY: PUBLIC WATER SANITARY SURVEY RECORDS** Includes reports, summaries, studies, correspondence (including e-mail), and other related records documenting the sanitary condition of system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 10 years after completion of survey.* b) Destroy in office documentation of corrective measures 2 years after their implementation.	Retention: 40 CFR 141.33 15A NCAC 18C .1526

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.38	**WATER QUALITY: SEWER JETTING AND VECTORING RECORDS** Records documenting the routine cleaning of wastewater lines.	Destroy in office after 3 years.	
18.39	**WATER QUALITY: SLUDGE TREATMENT RECORDS** Includes analyses, certification statements, site restrictions, monitoring records, vector attraction reduction requirements, trip tickets, residual records, control plans and other related documentation conducted by or for agency.	Destroy in office after 5 years.*	Retention: 40 CFR 503.17
18.40	**WATER QUALITY: STORMWATER DEVIATION PERMITS** Permits issued to single lots. Includes applications, certifications of installations, and related records.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office inspections submitted by owner when superseded or obsolete.	
18.41	**WATER QUALITY: VIOLATION RECORDS** Includes all documentation of actions taken to correct federal, state or local violations of water and wastewater management standards by agency.	Destroy in office after 5 years.*	Retention: 40 CFR 141.33 15A NCAC 18C .1526
18.42	**WATER QUALITY: WATER AND WASTEWATER SYSTEM INSPECTIONS AND TESTS** Includes non-compliance inspections and test records conducted by a facility.	Destroy in office after 5 years.	

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STANDARD 19: PROGRAM OPERATIONAL RECORDS – STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS

Official records and materials created and accumulated for constructing and maintaining municipal and county-maintained streets and other public works projects, and engineering records.

ITEM #	*STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS*		
	RECORDS SERIES TITLE	*DISPOSITION INSTRUCTIONS*	*CITATION*
19.01	**APPRAISAL REPORTS** Records appraising privately owned land for compensation in eminent domain projects. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 10 years.	
19.02	**CEMETERY DEEDS** Copies of deeds for the purchase of agency-owned cemetery plots. Includes applications or deed slips.	a) Retain 1 copy of deed in office permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	
19.03	**CEMETERY INTERMENT RECORDS** Includes name of deceased, date of interment, and location of plot.	Retain in office permanently. *Retention Note: If these records are maintained as an electronic database, a copy should be maintained on paper or microfilm and updated regularly.*	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.04	**EXCAVATION PERMITS** Applications, permits, and billing information for individuals and contractors requesting to work in the county or municipal right-of-way for demolitions or excavations.	a) Destroy in office billing records after 3 years.* b) Destroy in office applications and permits 1 year after expiration. c) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after_____	
19.05	**GRAVE OPENING ORDERS** Authorizations to dig graves in agency-owned cemeteries.	Destroy in office after 1 year.	
19.06	**INFRASTRUCTURE MAINTENANCE RECORDS** Records documenting the general maintenance and upkeep of infrastructure, including roads, traffic lights, and other public works.	Destroy in office after 3 years.	
19.07	**PLANNING FILE** Includes long-range and immediate plans for paving streets and other projects.	Destroy in office 5 years after superseded or obsolete.	
19.08 	**PROJECT RECORDS - CANCELLED** Background information for public works and engineering projects explored but not undertaken. Records are used as a reference file and include maps, project information, and the reason that the project failed.	a) Retain records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.09 	**PROJECT RECORDS – CORE** Records used to document the design and construction of public works and engineering projects. Includes final as-built plans and specifications; certificate of completion/closure; policy correspondence (including e-mail), covenants; final estimates and budgetary summaries; geo-technical reports; environmental mitigation agreements; permits for right-of-way use, photographs documenting key aspects of construction as-built; final specifications; and as-built structural calculations.	Destroy originals after life of structure ends.	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.10 	**PROJECT RECORDS – ENGINEERING & COMPLIANCE** Records used to document the engineering and technical areas of a public works and engineering project, as well as compliance with regulatory requirements. Includes superseded plans and specifications, agreements for construction and finance, billing information, change orders, force orders, work orders, construction claims, contract documentation, contracts, reports, diaries and narratives, EEO information, material certifications, material testing reports, notice to proceed, permit of entry, postings, pre-construction conference records, final progress payments, punch lists, regulations, shop drawings, and subcontractor information. File also includes environmental review records and proof of compliance with any mitigation measures required as a condition of project authorization. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.)	Destroy in office 6 years after completion or termination of project.*	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.11	**PROJECT SHEETS FILE** Local forms listing property owners, lot or tract size, right-of-way data, tax value, and compensation.	Destroy in office after 5 years.	
19.12	**RIGHT-OF-WAY ACQUISITION WORKING RECORDS** Includes records of negotiations on acquisition of rights-of-way related to public works and engineering projects, such as 10-day letter of notification, notification of intent to acquire, notice of condemnation action, and other correspondence (including e-mail) relating to right-of-way acquisitions. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 3 years.*	
19.13	**STREET NAME AND HOUSE NUMBER FILES** Records relating to the assignment of street names and house numbers. May also include records documenting street name changes, and non-temporary street openings and closings.	Retain in office permanently.	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.14 	**STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS** Records used for maintenance, review, and analysis of permanent and temporary structures owned by third parties that extend, cross or abut the public right-of-way. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy records pertaining to structure 3 years after the end of life of the structure.	Confidentiality: G.S. 132-1.7
19.15	**SURVEY FIELD RECORDS** Records used to document and establish easements and rights-of-way, and to locate reference points used during street and utility projects. Records include traverse information, tie sheets, sketches, field notes, plats, interpretation of field notes, alignments, profiles of projects, plans, grade sheets, estimates, databank ties, and other miscellaneous documents used to establish grades, rights-of-way and easements. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	a) Retain records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
19.16	**TRAFFIC ANALYSIS** Analysis of vehicle traffic within agency jurisdiction.	Destroy in office after 5 years.	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.17	**TRAFFIC VIDEO RECORDINGS AND DATA** Recordings and other data used to monitor traffic levels.	Destroy in office after 30 days.*	

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STANDARD 20: PROGRAM OPERATIONAL RECORDS - LAW ENFORCEMENT RECORDS (EXCLUDING SHERIFF'S OFFICES)

Records received and created by any local government law enforcement agency (excluding sheriff's offices) necessary to meet all statutory requirements. Comply with applicable provisions of G.S. §132-1.4 regarding confidentiality of law enforcement records and G.S. §153A-98 and G.S. §160A-168 regarding confidentiality of personal information of law enforcement officers.

Please note: Records created by county sheriff's offices fall under the purview of the Records Retention Schedule of County Sheriff's Offices.

ITEM #	*STANDARD 20: LAW ENFORCEMENT RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.01	**ALARM CALL REPORTS** Reports completed by officers responding to alarm calls. Includes listings of alarm type, time received, time arrived, reason for activation, and other related information. Includes forms completed by businesses and residences naming emergency contacts, location of safe, or other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	
20.02	**ALTERNATIVE SENTENCING PROGRAMS** Records documenting alternative sentencing programs. Includes work release and weekender service.	Destroy in office 3 years after individual leaves program.	
20.03 	**ARREST PROCESSING RECORDS** Records used to track a defendant's time and activities while in arrest processing. Includes time of arrival and time to and from each workstation.	Destroy in office 1 year after date of arrest.*	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.04 	**ARREST REPORTS** Reports concerning arrests made by officers.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 5 years from date of arrest if report is not made part of a case file.	Confidentiality: G.S. 132-1.4
20.05	**AUCTION RECORDS** Records concerning abandoned and unclaimed articles or found property in possession of law enforcement sold at public auction. May include auction receipts of monies received for items sold.	Destroy in office after 3 years.*	
20.06 	**CASE FILE: FELONIES** Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure report, statements of seized and returned property, interview sheets; case status reports, photographs, court orders, correspondence; officer's notes, court dispositions, audio or video recordings, and other related records. SEE ALSO: Electronic Recordings of Interrogations, below.	a) Destroy in office records concerning solved cases 20 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved cases until solved, and then follow disposition instructions in part (a).	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.07 	**CASE FILE: MISDEMEANORS** Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure reports, statements of seized and returned property, interview sheets, case status reports, photographs, court orders, correspondence, officer's notes, court dispositions, audio or video recordings, and other related records.	a) Destroy in office records concerning solved malicious misdemeanor cases 3 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved malicious misdemeanor cases until solved, and then follow disposition instructions in part (a). c) Destroy in office records concerning all misdemeanor cases not covered in (a) or (b) after 3 years.*	Confidentiality: G.S. 132-1.4
20.08 	**COMMUNICATION RECORDS** Recordings, printouts, and logs of telephone, radio, dispatch, 911 emergency calls or texts, and computer aided dispatch (CAD) systems incoming and/or outgoing communications. Includes time and date of call, contents of call, location of call, name of unit sent to scene, and other related information. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, 911 Communication Records and Recordings AND Dispatch Records and Recordings.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.09 	**COMPLAINTS** Records concerning complaints to which a unit responded. Includes logs listing name and address of victim, time, date, nature of complaint, responding officer's name, action taken, and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 3 years after resolution if not made part of a case file.	Confidentiality: G.S. 132-1.1(a)
20.10	**COMPOSITE INTERVIEWS** Summaries of interviews used to determine the physical description of suspects.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after_____	
20.11 	**CRIME ANALYSIS RECORDS** Records used to anticipate, prevent, or monitor possible criminal activity. Includes crime reports, photographs, complaints, copies of citations, criminal profile information, and interoffice memoranda generated or accumulated in connection with investigations or directed patrols.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after_____	Confidentiality: G.S. 132-1.4 G.S. 132-1.7(a2) Authority/ Confidentiality/ Retention 28 CFR 23.20

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.12 	**DETENTION FACILITY INCIDENT REPORTS** Detention facility incident reports. Include narratives of incidents, lists of those involved, statements and interview reports, inmates' refusal of medical treatment, inmates' refusal to press charges, and other related records. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Litigation Case Records (STANDARD 6: LEGAL RECORDS).	c) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors d) Destroy in office after 3 years if not made part of a case file.*	Confidentiality: G.S. 132-1.1(a)
20.13	**DETENTION FACILITY OPERATIONAL RECORDS** Records concerning all activities occurring during shifts at detention facilities. Includes end of duty (shift change reports, key and radio control lists, equipment and inmate/non-inmate housing check lists, cell inspection reports, laundry exchange and controlled property lists, tour reports, etc.) and inmate accountability (rosters, commitment and release reports, cell locations, etc.) records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after_____	
20.14	**DETENTION FACILITY PHYSICAL FORCE RECORDS** Reports made by any officer or employee of a detention facility who applies physical force to an inmate or arrestee.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.15	**DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES** Records and logs listing entries and inquiries made against DCI-NCIC networks and concerning missing persons, wanted persons, stolen vehicles or other property, and other related topics.	Destroy in office 1 year after period covered by audit.*	Authority: 28 USC 534
20.16	**DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS** Requests and proofs of verification for DCI-NCIC or other law enforcement information networks.	Destroy in office after 1 year.*	Authority: 28 USC 534
20.17	**DNA SAMPLING RECORDS** Records documenting the collection of DNA samples from persons for qualifying offenses. Includes copies of judgments. Original samples are forwarded to the State Crime Lab.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 1 year from date sample was obtained if not made part of a case file.	Authority: G.S. 15A-266.8

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.18 	**DOMESTIC VIOLENCE RECORDS** Restraining orders and related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after expiration of restraining order if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.19	**DRUG AND ALCOHOL TESTING RECORDS** Records and reports generated when individuals suspected of being under the influence of or impaired by illegal drugs or alcohol are chemically tested. Includes reports used for persons arrested for driving while impaired by alcohol and/or drugs and breathalyzer analysis reports. SEE ALSO: Laboratory Case Records, below.	a) Transfer original Driving While Impaired (DWI) reports to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after_____	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.20 	**ELECTRONIC RECORDINGS OF INTERROGATIONS** Electronic recordings generated by audio and/or video recording devices of custodial interrogations in an investigation of a juvenile or any person in a criminal investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after_____	Authority: G.S. 15A-211 Confidentiality: G.S. 7B-3001(b) G.S. 132-1.4A
20.21 	**FIELD OBSERVATIONS** Records concerning field observations of suspicious persons or vehicles. Includes subject's name, address, and physical description; date, time, and location of occurrence; reason for stop; name of officer conducting interview; and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after_____	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.22 	**FINGERPRINT CARDS** Records used to verify a subject's identity. Includes fingerprints and all necessary information required to identify an individual. Also includes records of latent finger and palm prints that were found at the scene of a crime without identification of suspects *Original fingerprint records are forwarded to the State Bureau of Investigation.* SEE ALSO: Juvenile Case History Identification Records, below.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of case file.	Confidentiality: G.S. 132-1.4 Authority: G.S. 15A-502
20.23	**FORCIBLE ENTRY RECORDS** Records concerning forcible entries made by law enforcement personnel.	Destroy in office after 1 year.	
20.24	**FUGITIVE WARRANTS CASE RECORDS** Records concerning fugitive warrants sent to a department from another jurisdiction requesting assistance in finding an individual. Includes fugitive profile and warrant.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after_____	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.25 	**IDENTIFICATION PHOTOGRAPHS** Photographs (mugshots) of persons arrested in association with formal investigations. Also includes driver's license photos or negatives. SEE ALSO: Juvenile Case History Identification Records, below.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.26	**INCIDENT RESPONSE REPORTS** Reports completed by officers responding to incidents. Includes victim, suspect, and witness information; damaged and stolen property reports; statement sheets; Miranda waiver forms; and other related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after_____	Confidentiality: G.S. 132-1.4
20.27	**INMATE CLASSIFICATION RECORDS** Records concerning classification information gathered by the detention facility while inmates are incarcerated. Also includes incident reports, behavioral or disciplinary reports, interviews, classification level assigned, requested housing moves, and other related records.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.28	**INMATE COMMITMENT RECORDS** Copies of judgment and commitment papers received from the Clerk of Superior Court's office used to validate time spent incarcerated.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after_____	
20.29	**INMATE DEATH REPORTS** Reports filed by office upon the death of an inmate. A report must be sent to the county health director and N.C. Department of Health and Human Services, within five days of the death.	Destroy in office after 3 years.*	Authority: G.S. 153A-224(b)
20.30	**INMATE FINANCIAL RECORDS** Records concerning individual inmate funds maintained by a detention facility for use by the inmate while incarcerated. Includes balance sheets listing inmate's name and number, amount of funds, dates of deposits and withdrawals, and other related information.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.31 	**INMATE GRIEVANCE RECORDS** Records concerning grievances filed by inmates and actions taken.	a) If legal action is taken and case adjudicated, destroy in office 5 years after final disposition. b) If legal action is taken and case non-adjudicated (out-of-court claims), destroy in office 5 years after final disposition or expiration of relevant statute of limitations. c) Destroy remaining records in office 3 years after inmate is released or transferred from the facility.*	Confidentiality: G.S. 132-1.1(a)
20.32	**INMATE MAIL, TELEPHONE, OR VISITOR RECORDS** Records concerning telephone calls and mail sent and received by inmates and individuals visiting inmates confined in county or municipal detention facilities. Includes logs listing inmate's name, date and time of call or mail, visitor's signature and address, and other related information.	Destroy in office after 1 year.*	
20.33	**INMATE MEAL RECORDS** Records concerning the planning and scheduling of inmate meals. Includes food service daily shift reports, daily meal sheets, food order forms, kitchen checklists, lists of inmates receiving meals and other related records. File also includes records concerning requests for special diets made by inmates.	Destroy in office after 3 years.*	Retention: 10A NCAC 14J .1723

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.34 	**INMATE MEDICAL RECORDS** Records concerning medical examinations, diagnoses, and treatments of inmates. Includes medical information sheets and screening forms, medical histories as provided by inmate, receipt and/or release forms for medications and medical articles, laboratory and x-ray reports, blood pressure records, sick bay transfer forms, special diet authorizations, psychological evaluation forms, suicide watch sheets, progress notes, health assessment forms, dental forms, doctors' orders, transportation records to outside clinics or hospitals, and other related records. May also include authorization records for release of medical information to detention facility staff, informed consent forms, refusal of treatment forms, and release of financial responsibility forms. SEE ALSO: Juvenile Detention Records, below.	Destroy in office 10 years after inmate's release or parole.	Confidentiality: G.S. 8-53 45 CFR 164.502
20.35	**INMATE PERSONAL IDENTIFICATION RECORDS** Records concerning changes to be made to an inmate's incarceration file. Includes personal identification changes, superior court calendar, long form dismissals and other related records.	Destroy in office 30 days after receipt.*	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.36	**INMATE RESEARCH REQUESTS** Requests filed by inmates seeking use of a facility's law library or similar collection containing research materials.	Destroy in office 1 year from date of request.	
20.37 	**JUVENILE CASE FILES** Includes incident and arrest reports, detention orders, disposition instructions, name and address of person having legal and/or physical custody of child, correspondence with county, municipal, or state juvenile services, and other related records.	a) Destroy in office records when juvenile reaches 21 years of age if adjudicated for an offense that would have been a Class A, B1, B2, C, D, or E felony if committed by an adult. b) Destroy in office records related to all other cases when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b) Retention:
20.38 	**JUVENILE CASE HISTORY IDENTIFICATION RECORDS** Includes fingerprints and photographs.	a) Transfer to the State Bureau of Investigation and Federal Bureau of Investigation. b) Destroy in office agency copies when reference value ends.*± Agency Policy: Destroy in office after_____	Confidentiality/ Retention: G.S. 7B-2102
20.39 	**JUVENILE DETENTION RECORDS** Records concerning medical and non-medical information gathered on juvenile inmates held in county or municipal detention facilities.	a) Destroy in office medical records when juvenile reaches 30 years of age. b) Destroy in office non-medical records when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b)

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.40 	**LABORATORY CASE RECORDS** Records concerning cases examined in a crime laboratory; includes reports, notes, charts, and other related records	Retain in office permanently.	Confidentiality: G.S. 132-1.4
20.41 	**LAW ENFORCEMENT AUDIO AND VIDEO RECORDINGS** Tapes and digital recordings generated by mobile and fixed audio and video recording devices. Does not include Electronic Recordings of Interrogations, above.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4A G.S. 153A-98
20.42	**MULTIPLE FIREARMS SALES REPORTS** Reports received from dealers reporting the sale of multiple firearms.	Destroy in office when reference value ends, but within 20 days after receipt.± Agency Policy: Destroy in office after_____	Retention: 18 USC 923(g)(3)(b)
20.43	**MULTIPLE FIREARMS SALES REPORTS DESTRUCTION RECORDS** Records submitted after 6 months to the U.S. Attorney General's Office certifying that all multiple firearm sales reports received from dealers have been destroyed.	Destroy in office after 1 year.	Authority: 18 USC 923(g)(3)(b)

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.44	**ORDINANCE VIOLATIONS CITATIONS** Citations issued for violations of municipal and county ordinances.	Destroy in office after 3 years.*	
20.45	**PAWNSHOP RECORDS** Pawnshop cards and property records submitted to municipal and county law enforcement offices.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	Authority: G.S. 66-391
20.46	**PERMISSION TO SEARCH RECORDS** Authorizations for officers to search property, and if necessary, confiscate property deemed pertinent to an investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of a case file.± Agency Policy: Destroy in office after_____	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	**DISPOSITION INSTRUCTIONS**	**CITATION**
20.47 	**PERMITS: CONCEALED WEAPONS AND HANDGUNS** Applications and supporting documentation filed to carry concealed weapons or purchase handguns. Includes background checks and other related records.	a) Destroy in office all approved applications after 5 years. b) Destroy in office denied applications and related records 5 years from date of denial or resolution of petition filed with district court, whichever is longer. c) Destroy in office background checks and related records concerning approved applications when permit is issued.	Authority/ Confidentiality: G.S. 14-415.17 G.S. 132-1.4 G.S. 132-1.7
20.48	**PRISON RAPE ELIMINATION ACT (PREA) FILE** Allegation, investigation, and incident review records documenting investigations into allegations of sexual abuse or sexual harassment.	Destroy in office 6 years after inmate's release.* *Retention Note: If a minor is involved in the incident, records should be retained until the minor reaches age 30.*	Authority: 28 CFR Part 115
20.49	**PRISON RAPE ELIMINATION ACT (PREA) DATA FILE** Aggregated data for every allegation of sexual abuse at county or municipal lockups.	Destroy in office after 10 years.	Authority/Retention: 28 CFR Part 115.187 28 CFR 115.189(d)
20.50	**PRISONER TRANSPORT RECORD** Verification forms completed by receiving party of prisoner patient.	Destroy in office after 1 year.	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.51	**PROPERTY RECORDS** Records concerning confiscated property, evidence, stolen or recovered property, and unclaimed property. Includes descriptions of property and its value, serial numbers, and other related records. Records may also be filed with original incident report.	Destroy in office 3 years after final disposition of property.	
20.52	**PURSUIT LOGS** Logs concerning pursuits by law enforcement personnel.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of a case file.	
20.53	**RIDE-ALONG PROGRAM RECORDS** Records concerning a law enforcement ride-along program.	Destroy in office after 3 years.*	
20.54	**SEXUAL OFFENDER RECORDS** Records concerning sexual offenders living within jurisdiction.	a) Destroy in office records of persons registered in the "Sexually Violent Predator Program" when individual is known dead or after 90 years. b) Destroy in office records of persons registered in the "Sex Offender and Public Protection Program" after court petition and review by the state; or after 30 years or length of court order, whichever is greater; or when individual is known dead.	Authority: G.S. 14-208 Retention: G.S. 14-208.6A

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.55	**TRAFFIC ACCIDENT REPORTS** Records concerning traffic accidents. Includes general correspondence, property receipts, collision reports, waivers signed by involved parties agreeing to settle damages among themselves, and other related records.	a) Transfer original collision report to the N.C. Division of Motor Vehicles within 10 days of accident. b) Destroy in office after 3 years records concerning accidents not meeting N.C. Division of Motor Vehicles reporting requirements, but for which a report was made. c) Destroy in office duplicate reports when reference value ends.± Agency Policy: Destroy in office after_____	Confidentiality: 18 USC 2721
20.56 	**TRAFFIC CITATIONS AND WARNINGS** Citations issued to drivers violating motor vehicle and traffic laws. Includes voided citations and warnings that do not require a fine or court appearance.	a) Transfer original citations to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case FIle: Felonies Case File: Misdemeanors c) Destroy remaining records in office after 1 year.	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
20.57	**TRESPASS RECORDS** Authorizations by property owners, lessees, or managers for law enforcement officers to take action deemed appropriate to remove unauthorized persons and issue trespass warnings.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 1 year after expiration if not made part of a case file.	Authority: G.S. 14-159.12-13
20.58	**VEHICLE TOWING RECORDS** Includes recovery authorizations and consent forms completed by owners to have vehicle towed, removed, stored, or left at the scene.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	

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STANDARD 21: PROGRAM OPERATIONAL RECORDS - TAX RECORDS (FOR MUNICIPALITIES)

Records received and created by a municipality for the purposes of collecting taxes. For County Tax Administration records, please refer to the separate County Tax Administration Program Schedule.

ITEM #	*STANDARD 21: TAX RECORDS*		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
21.01 	**ANIMAL LICENSING RECORDS** Records concerning the licensing of dogs, cats, and other animals by the municipality. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Authority: G.S. 160A-212 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.02	**BEER AND WINE TAXES AND RECORDS** Records concerning the levy of privilege taxes on beer and wine.	Destroy in office after 3 years.*	Authority: G.S. 105-133.77-79
21.03 	**BICYCLE LICENSE PLATE RECORDS** Records concerning issuance of license plates for bicycles.	Destroy in office after 1 year.*	Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

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ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
21.04	**DELINQUENT TAXPAYER RECORDS** Records concerning taxpayers who have not paid real and personal property taxes due, including unpaid notices. SEE ALSO: Delinquent Taxpayer Records: Advertisement of Tax Liens Against Real Property, below.	Destroy in office after 10 years or 3 years after final settlement or 1 year after released by governing board, whichever comes first.*	
21.05	**DELINQUENT TAXPAYER RECORDS: ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY** Records concerning the municipal taxation officer's publication in the newspaper of delinquent taxpayer and tax sales notices. SEE ALSO: Delinquent Taxpayer Records, above.	Destroy in office after 10 years.*	Authority: G.S. 105-369
21.06	**MOTOR VEHICLE RENTAL TAX RECORDS** Records concerning motor vehicle rental tax assessments.	Destroy in office after 3 years.*	
21.07	**MUNICIPAL VEHICLE TAX RECORDS** Records concerning municipal vehicle taxes levied annually.	Destroy in office after 3 years.*	Authority: G.S. 20-97(b)
21.08	**PREPARED FOOD AND BEVERAGE TAX RECORDS** Records concerning prepared food and beverage tax assessments.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
21.09	**PRIVILEGE LICENSES, TAXES, AND FEE RECORDS** Records concerning the licensing of occupations, businesses, trades, professions, and forms of amusement or entertainment and associated fees and taxes. SEE ALSO: Animal Licensing Records (above), Beer and Wine Taxes and Records (above), Municipal Vehicle Tax Records (above), Taxicab and Limousine Tax Records (below).	Destroy in office after 3 years.*	Authority: G.S. 160A-194
21.10 	**ROOM OCCUPANCY TAX RECORDS** Records concerning the administration of room occupancy tax records for those municipalities who have adopted room occupancy taxes.	Destroy in office after 3 years.*	Authority: G.S. 160A-215 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

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ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
21.11 	**SCHEDULE "B" LICENSES** Receipts of licenses issued by municipality in accordance with Article 2, Schedule B of the Revenue Laws of North Carolina. Applies to privilege licenses issued to attorneys-at-law and other professionals, installment paper dealers, and pawnbrokers.	a) Destroy in office 3 years after close of license tax year stubs or detailed settlement records. b) Destroy in office stubs 1 years after audit if settlement records are kept.	Authority: G.S. 105-41 G.S. 105-83 G.S. 105-88 G.S. 153A-152 G.S. 160A-211 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.12	**TAX ABSTRACTS AND LISTS** Records concerning real and personal property in the municipality, based on assessment lists. Includes name and address of taxpayer along with descriptions of property owned and estimated value.	Destroy in office after 10 years or two revaluation cycles.	Authority: G.S. 105-309 G.S. 105-296
21.13	**TAX EXEMPT PROPERTY FILE** Records concerning property that is exempt from taxation.	Destroy in office 5 years after property exemption has expired or at end of life of structure, whichever comes first.	
21.14	**TAX LEDGER CARDS OR SHEETS**	Destroy in office 5 years after superseded or obsolete.	

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ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	***DISPOSITION INSTRUCTIONS***	***CITATION***
21.15	**TAX LEVY/SEIZURE RECORDS** Inventory of property taken from property owner by the municipal tax collector to pay back taxes.	a) Destroy in office after 3 years execution forms if levy and sale of personal property is made. If levy and sale are conducted by municipal law enforcement agency, execution forms are to be retained by that agency. b) If levy, seizure, and sale are not made, destroy in office forms when reference value ends.± Agency Policy: Destroy in office after _____	Authority: G.S. 105-366 G.S. 105-367
21.16	**TAX LIEN SALES** Records concerning sales held to satisfy tax liens.	Destroy in office 10 years after sale.	
21.17	**TAX REBATES** Records concerning tax rebates given or received.	Destroy in office after 10 years.	
21.18	**TAX SCROLLS** Records indicating property (real estate and personal) valuation and taxes due.	Destroy in office after 10 years.	
21.19	**TAXICAB AND LIMOUSINE TAX RECORDS** Records concerning the levy of privilege taxes on taxicabs and limousines.	Destroy in office after 3 years.*	Authority: G.S. 20-97(d)

** No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.*

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this "records retention and disposition schedule"?

A. This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

A. This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.

Q. Am I required to have all the records listed on this schedule?

A. No, this is not a list of records you must have in your office.

Q. What is "reference value"?

A. Items containing "reference value" in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase "destroy in office when reference value ends" in the disposition instructions.

Q. Do the standards correspond to the organizational structure of my agency?

A. Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule's organization is to provide an easy reference guide for the records created in your agency.

Q. What if I cannot find some of my records on this schedule?

A. Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-17) can be used for such requests.

Q. What are public records?

A. The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:

> "Public record" or "public records" shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or

characteristics, made or received pursuant to law or ordinance in connection with the transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (state or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the state or of any county, unit, special district or other political subdivision of government.

Q. Is any person allowed to see my records?

A. Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

> "Every custodian of public records shall permit any record in the custodian's custody to be inspected and examined at reasonable times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. … No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request."

Q. What about my confidential records?

A. Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.

Q. Am I required to make available to the public copies of drafts that have not been approved?

A. Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is "finished" or not.

Q. What do I do with permanent records?

A. Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of "*a program for the selection and preservation of public records considered* ***essential*** *to the operation of government and to the* ***protection of the rights and interests*** *of persons"* (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.

- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.
- Adoptions, marriages, and divorces document changes in familial relationships and document citizenship. Though adoptions are confidential (not available for public inspection), they document citizenship and changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

A. Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its citizens. Two criteria for determining historical value are inherent interest and extraordinary documentation:

- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
- Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of citizens?
- Do they have a long-term impact on citizens?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

A. Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

A. We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on Page A-21. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. May I store our unused records in the basement, attic, shed, etc.?

A. Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?

A. Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. Aren't all our old records at the State Archives of North Carolina?

A. Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. I found some really old records. What should I do with them?

A. Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. Can I give my old records to the historical society or public library?

A. Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. Whom can I call with questions?

A. If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See also GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance, STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS, Audits: Financial, STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as "record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use."[3]

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called "transitory records." The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the General Records Schedule for Local Government Agencies, their office's Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, "while you were out" slips, memory aids, etc.?

A. Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, "while you were out" slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the General Records Schedule for Local Government Agencies or your office's Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

A. Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

[3] Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

A. If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g. a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/digital-signature-policy

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

A. Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are "Retain in office permanently," which means that those records must be kept in your offices forever.

Q. How do I destroy records?

A. After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:

1) burned, unless prohibited by local ordinance;
2) shredded, or torn so as to destroy the record content of the documents or material concerned;
3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

   The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

   The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

   — N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency's approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

A. Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a Request for Disposal for Unscheduled Records form if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. Am I required to tell anyone about the destructions?

A. We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, https://archives.ncdcr.gov/government/rm-tools).

Destructions Log

County/Municipality					
Division		**Section**		**Branch**	
Location(s) of Records					

Records Series	**Required Retention**	**Date Range**	**Volume** (file drawers or MB)	**Media** (Paper, Electronic)		**Date of Destruction**	**Method of Destruction**	**Authorization for Destruction**
				P	**E**			

A-10

ELECTRONIC RECORDS:
E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

A. E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

From the Department of Cultural Resources E-Mail Policy (Revised July 2009), available at the State Archives of North Carolina website

Other publications (available online at the State Archives of North Carolina website) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

A. We do not recommend printing e-mail for preservation purposes. Important metadata are lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

A. The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records "made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions" are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. We have an imaging system. Are we required to keep the paper?

A. You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's **Human-Readable Preservation Duplicate Policy** (N.C. Gen. Stat. § 132-8.2):

> Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. Computer storage is cheap. Can I just keep my computer records permanently?

A. The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?

A. There are numerous documents available on the State Archives of North Carolina website (https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years. On the General Records Schedule: Local Government Agencies, see Leave Records (Standard 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

A. Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

A. The following types of geospatial records have been designated as having archival value:

- Parcel data
- Street centerline data
- Corporate limits data
- Extraterritorial jurisdiction data
- Zoning data, address points
- Orthophotography (imagery)
- Utilities
- Emergency/E-911 themes

For more information, see **GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS**.

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

A. Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

A. Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at https://it.nc.gov/about/boards-commissions/gicc.

You should also comply with guidelines and standards issued by the State Archives of North Carolina, which are available on its website.

Q. Who should be responsible for creation and long-term storage of archived data?

A. The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

A. Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

A. The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.

Q. How do I start the process of backing up the above listed records?

A. We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the State Archives of North Carolina website) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "Transfer of Minutes in Digital Formats for Microfilming" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

A. Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. Can I obtain digital copies of the security preservation records?

A. Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

A. Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

A. We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.

Q. What can I do to prepare for an emergency?

A. We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.

Q. What are essential records?

A. Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:

- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
- **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as "rights-and-interests" records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

A. We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:

- Managing public records in North Carolina
- Disaster preparedness and recovery
- Digital communications

Q. Will you design a workshop especially for our office?

A. Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

A. No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public.

To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (https://archives.ncdcr.gov/government/local/analysts).

Q. Is there a fee for workshops?

A. Not at this time.

Q. Are the workshops available in an online format?

A. We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see https://archives.ncdcr.gov/government/training/webinars. You can also find several online tutorials available on the State Archives of North Carolina website (https://archives.ncdcr.gov/government/training/online-tutorials-and-resources).

Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

☐ Add a new item
☐ Delete an existing item Standard Number _____ Page _____ Item Number _____

☐ Change a retention period Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records: Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by: _____
Signature Title Date

Approved by: _____
Signature Requestor's Supervisor Date

NC DEPARTMENT OF NATURAL AND CULTURAL RESOURCES

GOVERNMENT RECORDS SECTION
STATE RECORDS CENTER

archives.ncdcr.gov 4615 Mail Service Center, Raleigh NC 27699-4165 919-814-6900

Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

In accordance with the provisions of N.C. GEN. STAT. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature	Title	Date

Approved by:

Signature	Requestor's Supervisor	Date

Concurred by:

Signature	Assistant Records Administrator State Archives of North Carolina	Date

Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:	**Date (MM-DD-YYYY):**
Phone (area code):	**E-mail:**
County/Municipality:	**Office:**
Mailing address:	

Records Series Title A group of records as listed in records retention schedule	**Description of Records** Specific records as referred to in-office	**Inclusive Dates** (1987-1989; 2005-present)	**Approx. Volume of Records** (e.g. "1 file cabinet," "5 boxes")	**Retention Period** As listed in records retention schedule

Requested by: _____

Signature Title Date

Approved by: _____

Signature Requestor's Supervisor Date

Concurred by: _____

Signature Assistant Records Administrator
State Archives of North Carolina Date

A-21

File Plan

County/Municipality					
Division		**Section**		**Branch**	

Records Series	**Records Creator**	**Records Owner** (if record copy is transferred within the agency)	**Media** (Paper, Electronic, Scanned)			**Required Retention**	**Location(s) of Records**
			P	**E**	**S**		

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CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
DHS - FY23 HCCBG (Home and Community Care Block Grant) Funding Plan

BRIEF SUMMARY:
The FY23 Home and Community Care Block Grant (HCCBG) Funding Plan is attached for review and approval by the Board of Commissioners. The plan has been prepared, reviewed, and approved by the HCCBG Advisory Committee. The Department of Human Services serves as the lead agency for the Home and Community Care Block Grant in Cabarrus County. The lead agency's primary role is to organize the committee, develop the funding plan for the grant and seek approval from the Board of Commissioners for the funding plan.

The Home and Community Care Block Grant serves citizens aged 60 and older and promotes health and well-being services for qualified recipients. The grant is administered by the N.C. Division of Aging and Adult Services (DAAS). The grant provides local flexibility in that the advisory committee and the Board of Commissioners can set priorities for services the grant will fund. There is a required ten percent local match.

REQUESTED ACTION:
Motion to approve the FY23 HCCBG Funding Plan as submitted by the Home and Community Care Block Grant Advisory Committee.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Anthony Hodges, Lead Agency Representative

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.

ATTACHMENTS:

- FY23 HCCBG Funding Plan

HCCBG Budget

DAAS-730
(Rev. 2/16)

Home and Community Care Block Grant for Older Adults

County Funding Plan

Identification of Agency or Office with Lead Responsibility for County Funding Plan

County: Cabarrus July 1, 2022 through June 30, 2023

The agency or office with lead responsibility for planning and coordinating the County Funding Plan recommends this funding plan to the Board of Commissioners as a coordinated means to utilize community-based resources in the delivery of comprehensive aging services to older adults and their families

Cabarrus DHS
(Name of Agency/Office with lead responsibility)

Authorized Signature Date

(Type name and title of signatory agent)

HCCBG Budget

DAAS-731 (Rev. 2/16)

Home and Community Care Block Grant for Older Adults

County Cabarrus

County Funding Plan

July 1, 2022 through June 30, 2023

County Services Summary

	A				B	C	D	E	F	G	H	I
	Block Grant Funding											
Services	Access	In-Home	Other	Total	Required Local Match	Net Service Cost	USDA Subsidy	Total Funding	Projected HCCBG Units	Projected Reimbursement Rate	Projected HCCBG Clients	Projected Total Units
DHS-Adult Day Health	$ -	$ 165,588	$ -	$ 165,588	$ 18,399	$ 183,987	$ -	$ 183,987	2224	$ 82.7245	28	2,225
DHS-Congregate Nutrition	$ -	$ -	$ 136,518	$ 136,518	$ 15,169	$ 151,687	$ 37,600	$ 189,287	13186	$ 11.5040	300	47,000
DHS-In-Home Aide-Level II - PC	$ -	$ 63,490	$ -	$ 63,490	$ 7,054	$ 70,544	$ -	$ 70,544	3647	$ 19.3408	12	3,650
DHS-In-Home Aide-Level III - PC	$ -	$ 136,597	$ -	$ 136,597	$ 15,177	$ 151,774	$ -	$ 151,774	6247	$ 24.2958	22	6,250
DHS-Transportation (General)	$ 90,198	$ -	$ -	$ 90,198	$ 10,022	$ 100,220	$ -	$ 100,220	5232	$ 19.1552	5567	108,977
DHS-Transportation (Medical)	$ 144,468	$ -	$ -	$ 144,468	$ 16,052	$ 160,520	$ -	$ 160,520	8380	$ 19.1551	8917	8,380
DOC-Housing & Home Imprvmt	$ -	$ -	$ 50,862	$ 50,862	$ 5,651	$ 56,513	$ -	$ 56,513	-			-
ALP-Senior Cntr Operation	$ -	$ -	$ 100,973	$ 100,973	$ 11,219	$ 112,192	$ -	$ 112,192	-	$ -		-
MOW-Home Delivered Meals	$ -	$ 121,942	$ -	$ 121,942	$ 13,549	$ 135,491	$ 88,000	$ 223,491	18446	$ 7.3454	300	110,000
MOW-HDM NSIP	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -	100	-
				$ -	$ -	$ -		$ -				
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				$ -	$ -	$ -		$ -				
				$ -	$ -	$ -		$ -				
Total	$ 234,666	$ 487,617	$ 288,353	$ 1,010,636	$ 112,292	$ 1,122,928	$ 125,600	$ 1,248,528	57362		15246	286,482

Signature, Chairman, Board of Commissioners Date

State Fiscal Year:	SFY 2022-2023
Provider Name:	Cabarrus County DHS
Address Line 1:	1303 S. Cannon Blvd
Address Line 2:	Kannapolis, NC 28083
County:	Cabarrus
Area Agency on Aging:	Centralina Council of Governments

	Please Select Services to Be Delivered		Federal/State	Local Match	
	Adult Day Health	155	$ 165,588	$ 18,399	<<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
	Congregate Nutrition	180	$ 136,518	$ 15,169	<<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
	In-Home Aide-Level II - Personal Care	042	$ 63,490	$ 7,055	<<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
	In-Home Aide-Level III - Personal Care	045	$ 136,597	$ 15,178	<<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
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REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	

Comparison of Fed/State Funding and Rates vs. Prior Year

Service		Prior Yr. Funding	Prior Year Rate	Current Yr Funding	Current Year Rate	Funding Diff.	Rate Diff.
Adult Day Health	155			$ 165,588	82.7245	$ 165,588	$ 82.7245
Congregate Nutrition	180			$ 136,518	11.5040	$ 136,518	$ 11.5040
In-Home Aide-Level II - Personal Care	042			$ 63,490	19.3408	$ 63,490	$ 19.3408
In-Home Aide-Level III - Personal Care	045			$ 136,597	24.2958	$ 136,597	$ 24.2958
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -

NC DIVISION OF AGING AND ADULT SERVICES COST OF SERVICES - LABOR DISTRIBUTION SCHEDULE DAAS-732A1

AGENCY NAME: Cabarrus County DHS

State Fiscal Year: SFY 2022-2023

Fiscal Period: July 2022 through June 2023

STAFF NAME	POSITION	TOTAL SALARY	FTE Equivalent	FULL TIME PART TIME	Assignable Salary	ADMIN. SALARY	SERVICE Adult Day Health	SERVICE Congregate Nutrition	SERVICE In-Home Aide-Level II - Personal Care	SERVICE In-Home Aide-Level III - Personal Care	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0
Cindy Hall	Nutrition Prog. Sup.	$ 65,978	1	FULL TIME	$ 65,978			$ 65,978						
Debbie Shields	Nutrition Prog. Spec.	$ 42,224	1	FULL TIME	$ 42,224			$ 42,224						
Ada Bowens	Nutrition Site Sup.	$ 34,694	0.7	PART TIME	$ 24,286			$ 24,286						
Crystal Faggart	Nutrition Site Sup.	$ 40,788	0.7	PART TIME	$ 28,552			$ 28,552						
Delores Neely	Nutrition Site Sup.	$ 38,375	0.7	PART TIME	$ 26,863			$ 26,863						
Allison Teal-Lewis	Nutrition Site Sup.	$ 37,794	0.7	PART TIME	$ 26,456			$ 26,456						
Melissa Ross	Nutrition Site Sup.	$ 33,612	0.7	PART TIME	$ 23,528			$ 23,528						
Katrina Wolford	Nutrition Site Sup.	$ 38,854	0.7	PART TIME	$ 27,198			$ 27,198						
Vacant	Nutrition Site Sup.	$ 32,405	0.7	PART TIME	$ 22,684			$ 22,684						
Vacant	Nutrition Site Sup.	$ 32,405	0.7	PART TIME	$ 22,684			$ 22,684						
Kimbaly Kelly	Social Worker II	$ 11,981	1	FULL TIME	$ 11,981		$ 5,152		$ 2,157	$ 4,672				
Janiece Lamberth	Social Worker II	$ 11,435	1	FULL TIME	$ 11,435		$ 4,917		$ 2,058	$ 4,460				
Talanya Weaks	Social Worker II	$ 14,997	1	FULL TIME	$ 14,997		$ 6,449		$ 2,699	$ 5,849				
					$ -									
					$ -									
					$ -				

North Carolina Division of Aging and Adult Services` DAAS-732A

Service Cost Computation Worksheet

Provider: Cabarrus County DHS
County: Cabarrus
Budget Period: July 2022 through June 2023

I. Projected Revenues	Grand Total		Service: Adult Day Health 155	Service: Congregate Nutrition 180	Service: In-Home Aide-Level II - Personal Care 042	Service: In-Home Aide-Level III - Personal Care 045	Service: 0 #N/A	Service: 0 #N/A
A. Fed/State Funding From the Div. of Aging & Adult Svcs.	$ 502,193		$ 165,588	$ 136,518	$ 63,490	$ 136,597	$ -	$ -
Required Minimum Match - Cash								
1)	$ 55,799		$ 18,399	$ 15,169	$ 7,054	$ 15,177		
2)	$ -							
3)	$ -							
Total Required Minimum Match - Cash	$ 55,799		$ 18,399	$ 15,169	$ 7,054	$ 15,177	$ -	$ -
Required Minimum Match - In-Kind								
1)	$ -							
2)	$ -							
3)	$ -							
Total Required Minimum Match - In-Kind	$ -		$ -	$ -	$ -	$ -	$ -	$ -
B. Total Required Minimum Match (cash + in-kind)	$ 55,799		$ 18,399	$ 15,169	$ 7,054	$ 15,177	$ -	$ -
C. **Subtotal, Fed/State/Required Match Revenues**	$ 557,992		$ 183,987	$ 151,687	$ 70,544	$ 151,774	$ -	$ -
D. NSIP Cash Subsidy/Commodity Valuation	$ 37,600		$ -	$ 37,600	$ -	$ -	$ -	$ -
E. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -							
Local Cash, Non-Match								
1) County General Fund	$ 365,000			$ 365,000				
2)	$ -							
3)	$ -							
4)	$ -							
F. **Subtotal, Local Cash, Non-Match**	$ 365,000		$ -	$ 365,000	$ -	$ -	$ -	$ -
Other Revenues, Non-Match								
1) Donations	$ 4,000		$ -	$ 4,000				
2)	$ -							
3)	$ -							
G. **Subtotal, Other Revenues, Non-Match**	$ 4,000		$ -	$ 4,000	$ -	$ -	$ -	$ -
Local In-Kind Resources (Includes Volunteer Resources)								
1)	$ -							
2)	$ -							
3)	$ -							
H. **Subtotal, Local In-kind Resources, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -
I. **Client Cost Sharing**	$ 20,200		$ 75	$ 20,000	$ 50	$ 75		
J. **Total Projected Revenues (Sum I.C,D,E,F,G,H, & I)**	$ 984,792		$ 184,062	$ 578,287	$ 70,594	$ 151,849	$ -	$ -

Division of Aging and Adult Services
Service Cost Computation Worksheet

II. Line Item Expenses	Grand Total	Admin. Cost	Service: Adult Day Health 155	Service: Congregate Nutrition 180	Service: In-Home Aide-Level II - Personal Care 042	Service: In-Home Aide-Level III - Personal Care 045	Service: 0 #N/A	Service: 0 #N/A
Staff Salary From Labor Distribution Schedule								
1) Full-time Staff (do not include Title V workers)	$ 146,615	$ -	$ 16,518	$ 108,202	$ 6,914	$ 14,981	$ -	$ -
2) Part-time staff (do not include Title V workers)	$ 202,251	$ -	$ -	$ 202,251	$ -	$ -	$ -	$ -
A. **Subtotal, Staff Salary**	$ 348,866	**$ -**	**$ 16,518**	**$ 310,453**	**$ 6,914**	**$ 14,981**	**$ -**	**$ -**
Fringe Benefits								
1) FICA @ 7.65 %	$ 26,688	$ -	$ 1,264	$ 23,750	$ 529	$ 1,146	$ -	$ -
2) Health Insurance	$ 21,945		$ 2,574	$ 15,960	$ 1,077	$ 2,334		
3) Retirement	$ 31,397		$ 1,487	$ 27,940	$ 622	$ 1,348		
4) Unemployment Insurance	$ -							
5) Worker's Compensation	$ 9,768		$ 463	$ 8,692	$ 194	$ 419		
6) Other	$ -							
B. **Subtotal, Fringe Benefits**	$ 89,798	$ -	$ 5,788	$ 76,342	$ 2,422	$ 5,247	$ -	$ -
Local In-Kind Resources Non-Match								
1)	$ -							
2)	$ -							
3)	$ -							
C. **Subtotal, Local In-Kind Resources Non-Match**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
D. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -							
Travel								
1) Per Diem	$ -							
2) Mileage Reimbursement	$ -							
3) Other Travel Cost	$ -							
E. **Subtotal, Travel**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
General Operating Expenses								
1) Service Contracts	$ 398,725		$ 184,480		$ 67,916	$ 146,329		
2) Caterer	$ 185,000		$ -	$ 185,000				
3) Host Agency Expenses	$ 32,000			$ 32,000				
4) Program Supplies	$ 6,500			$ 6,500				
5) Tools and Minor Equipment	$ 3,000			$ 3,000				
6) Purchased Services	$ 500			$ 500				
7) Training	$ -							
8)	$ -							
F. **Subtotal, General Operating Expenses**	$ 625,725	$ -	$ 184,480	$ 227,000	$ 67,916	$ 146,329	$ -	$ -
G. **Subtotal, Other Administrative Cost Not Allocated in Lines II.A through E**	$ -							
H. **Total Proj. Expenses Prior to Admin. Distribution**	**$ 1,064,389**	**$ -**	**$ 206,786**	**$ 613,795**	**$ 77,252**	**$ 166,557**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ 79,597**		**$ 22,724**	**$ 35,508**	**$ 6,658**	**$ 14,708**	**$ -**	**$ -**
J. **Total Proj. Expenses After Admin. Distribution**	**$ 984,792**		**$ 184,062**	**$ 578,287**	**$ 70,594**	**$ 151,849**	**$ -**	**$ -**

III. Computation of Rates	Grand Total	Service: Adult Day Health 155	Service: Congregate Nutrition 180	Service: ·Home Aide-Level II - Personal Cə	Service: ome Aide-Level III - Personal C 045	Service: 0 #N/A	Service: 0 #N/A
A. **Computation of Unit Cost Rate:**							
1. Total Expenses (equals line II.J)	$ 984,792	$ 184,062	$ 578,287	$ 70,594	$ 151,849	$ -	$ -
2. Total Projected Units		2,225	47,000	3,650	6,250		
3. Total Unit Cost Rate		$ 82.7245	$ 12.3040	$ 19.3408	$ 24.2958	$ -	$ -
B. **Computation of Reimbursement Rate:**							
1. Total Revenues (equals line I.J)	$ 984,792	$ 184,062	$ 578,287	$ 70,594	$ 151,849	$ -	$ -
2. Less: NSIP (equals line I.D)	$ 37,600	$ -	$ 37,600	$ -	$ -	$ -	$ -
Title V (equals line I.E less II.D)	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Non Match In-Kind (equals line I.H less II.C)	$ -	$ -	$ -	$ -	$ -	$ -	$ -
3. Revenues Subject to Unit Reimbursement	$ 947,192	$ 184,062	$ 540,687	$ 70,594	$ 151,849	$ -	$ -
4. Total Projected Units (equals line III.A.2)		2,225	47,000	3,650	6,250	-	-
5. Total Reimbursement Rate		$ 82.7245	$ 11.5040	$ 19.3408	$ 24.2958	$ -	$ -
C. **Units Reimbursed Through HCCBG**		**2,224**	**13,186**	**3,647**	**6,247**	**-**	**-**
D. **Units Reimbursed Through Program Income***		**1**	**1,739**	**3**	**3**	**-**	**-**
E. **Units Reimbursed Through Remaining Revenues**		**-**	**32,076**	**-**	**-**	**-**	**-**
F. **Total Units Reimbursed/Total Projected Units**		**2,225**	**47,000**	**3,650**	**6,250**	**-**	**-**

* The Division of Aging ARMS deducts reported program income from reimbursement paid to providers. Line III.D indicates the number of units that will have to be produced in addition to those stated on line III.C in order to earn the net revenues stated on line I.C.

Certification:

I certify to the best of my knowledge and belief that the information included in the cost computation above is accurate and complies with all laws and regulations. I also understand that material deviations in reported cost information could limit funding, and also result in return of funds if the error or omission results in a higher than actual reported cost.

Authorized Signature	Title	Date

Information on this form (DAAS-732A) corresponds with information stated on the Provider Services Summary (DAAS-732) as follows:

	DAAS-732A	DAAS-732
Block Grant Funding	Line I.A	Col. A
Required Local Match-Cash & In-Kind	Line I.B	Col. B
Net Service Cost	Line I.C	Col. C
NSIP Subsidy	Line I.D	Col. D
Total Funding	L. I.C+I.D	Col. E
Projected HCCBG Reimbursed Units	Line III.C	Col. F
Total Reimbursement Rate	Line III.B.5	Col. G
Projected Total Service Units	Line III.F	Col. I

Home and Community Care Block Grant for Older Adults

Cabarrus County DHS

1303 S. Cannon Blvd

Kannapolis, NC 28083

County Funding Plan

Provider Services Summary

DAAS-732

County: Cabarrus

Budget Period: July 2022 through June 2023

Revision #: **Date:**

Services	Serv. Delivery (Check One) Direct	Purchase	A Block Grant Funding Access	In-Home	Other	Total	B Required Local Match	C Net Service Cost	D NSIP Subsidy	E Total Funding	F Projected HCCBG Units	G Projected Reimburse Rate	H Projected HCCBG Clients	I Projected Total Units
Adult Day Health		X	$ -	$165,588	$ -	$ 165,588	$ 18,399	$ 183,987	$ -	$ 183,987	2,224	$82.7245	28	2,225
Congregate Nutrition		X	$ -	$ -	$ 136,518	$ 136,518	$ 15,169	$ 151,687	$ 37,600	$ 189,287	13,186	$11.5040	300	47,000
In-Home Aide-Level II - Personal Care		X	$ -	$ 63,490	$ -	$ 63,490	$ 7,054	$ 70,544	$ -	$ 70,544	3,647	$19.3408	12	3,650
In-Home Aide-Level III - Personal Care		X	$ -	$136,597	$ -	$ 136,597	$ 15,177	$ 151,774	$ -	$ 151,774	6,247	$24.2958	22	6,250
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
Total			$ -	$365,675	$ 136,518	$ 502,193	$ 55,799	$ 557,992	$ 37,600	$ 595,592	25,304		362	59,125

Certification of required minimum local match availability. Required local match will be expended simultaneously with Block Grant Funding.

Authorized Signature, Title — Date

Community Service Provider

Signature, County Finance Officer — Date

Signature, Chairman, Board of Commissioners — Date

DAAS-733
(Rev. 2/19)

Home and Community Care Block Grant for Older Adults
Outreach Methodology

July 2022 through June 2023

Outreach Methodology to Address the Service Needs of Target Population

Community Service Provider: Cabarrus County DHS

County: Cabarrus

While all older adults age 60 and over are eligible for services, sec. 305(a)(2)(E) of the Older Americans Act requires programs to target services to older individuals with the greatest economic and social need, (with particular attention to low-income older adults, including low-income minority older adults, older adults with limited English proficiency, and older adults residing in rural areas). The community service provider shall specify how these service needs will be met through the services identified on the Provider Services Summary (DAAS-732). This narrative shall address outreach and service delivery methodologies that will ensure that this target population is adequately served and conform with specific objectives established by the Area Agency on Aging, for providing services to low income minority individuals. Additional pages may be used as necessary.

The Cabarrus County Department of Human Services' goal is to increase participation in services and programs by low income elderly and elderly with limited English proficiency in the community. DHS provides assistance to all individuals living within the county's boundaries who request services, regardless of location within the county. The type and extent of services receive are based on clients' needs and availability of funding. Outreach by the agency has been accomplished by brochures, community forums, word of mouth, and contacts with community partners. Outreach is ongoing. Requests from clients who meet the need for HCCBG services will continue to be accepted. If services are full, new clients will be added as existing clients leave the program or experience a decrease of units needed or additional funds are secured. As a agency with multiple funding sources, assessments will be made with each case t be sure the most appropriate funding is used to best meet the needs of the clients and that the Older Americans Act funds are for the target population groups.

July 2022 through June 2023

Home and Community Care Block Grant for Older Adults
Community Service Provider
Standard Assurances

Cabarrus County DHS agrees to provide services through the Home and Community Care Block Grant, as specified on the Provider Services Summary (DAAS-732) in accordance with the following:

1. Services shall be provided in accordance with requirements set forth in:
   a) The County Funding Plan;

   b) The Division of Aging and Adult Services Home and Community Care Block Grant Procedures Manual for Community Service Providers; and

   c) The Division of Aging and Adult Services Standards at

   https://www.ncdhhs.gov/divisions/daas/monitoring

   Community service providers shall monitor any subcontracts with providers of Block Grant services and take appropriate measures to ensure that services are provided in accordance with the aforementioned documents.

2. Priority shall be given to providing services to those older persons with the greatest economic or social needs. The service needs of low-income minority elderly will be addressed in the manner specified on the Outreach Methodology to Address Service Needs of Target Population (DAAS-733).

3. The following service authorization activities will be carried out in conjunction with all services provided through the Block Grant:
   a) Eligibility determination;
   b) Client intake/registration;
   c) Client assessment/reassessments and quarterly visits, as appropriate;
   d) Determining the amount of services to be received by the client; and
   e) Reviewing consumer contributions policies with eligible clients.

4. All licenses, permits, bonds, and insurance necessary for carrying out Block Grant Services will be maintained by the community service provider and any subcontracted providers.

5. As specified in 45 CFR 75, Subpart D-Post Federal Award Requirements, Procurement Standards, community service providers shall have procedures for settling all contractual and administrative issues arising out of procurement of services through the Block Grant. Community service providers shall have procedures governing the evaluation of bids for services and procedures through which bidders and contracted providers may appeal or dispute a decision made by the community service provider.

6. Applicant/Client appeals shall be addressed as specified in Section 7 of the Division of Aging and Adult Services Home and Community Care Block Grant Manual for Community Service Providers.

7. Community service providers are responsible for providing or arranging for the provision of required local match, as specified on the Provider Services Summary, (DAAS-732). Local match shall be expended simultaneously with Block Grant funding.

8. Community service providers agree to comply with audit and fiscal reporting requirements as specified in the Agreement for the Provision of County-Based Aging Services (DAAS-735).

9. Compliance with Equal Employment Opportunity and Americans with Disabilities Act requirements, as specified in paragraph fourteen (14) of the Agreement for the Provision of County-Based Aging Services (DAAS-735) shall be maintained.

10. Providers of In-Home Aide, Home Health, Housing and Home Improvement, and Adult Day Care or Adult Day Health Care shall sign and return the attached assurance to the area agency on aging indicating that recipients of these services have been informed of their client rights, as required in Section 314 of the 2006 Amendments to the Older Americans Act (DAAS-734 Standard Assurances Regarding In-Home Client Rights).

11. Subcontracting – All HCCBG community service providers must assure that subcontractors (for-profit and non-profit entities only) meet the following requirements:

a. The subcontractor has not been suspended or debarred. (N.C.G.S. §143C-6-23, 09 NCAC 03M)
b. The subcontractor has not been barred from doing business at the federal level.
c. The subcontractor is able to produce a notarized "State Grant Certification of No Overdue Tax Debts."

d. All licenses, permits, bonds and insurance necessary for carrying out Home and Community Care Block Grant services will be maintained by both the community service provider and any subcontractors.

e. The subcontractor is registered as a charitable, tax-exempt (501c3) organization with the Internal Revenue Service (non-profit subcontractors only).

12. Confidentiality and Security. Per the requirements in 10A NCAC 05J and Section 6 of the Home and Community Care Block Grant Procedures Manual, client information in any format and whether recorded or not shall be kept confidential and not disclosed in a form that identifies the person without the informed consent of the person or legal representative. Community service providers, including subcontractors and vendors, must adhere to all applicable federal, state and departmental requirements for protecting the security and confidentiality of client information including but not limited to appropriately restricting access, establishing procedures to reduce the risk of accidental disclosures from data processing systems, and developing a process by which the Division of Adult Aging Services is notified of suspected or confirmed security incidents and data breaches.

13. Record Retention and Disposition. All community service providers are responsible for maintaining custody of records and documentation to support the allowable expenditure of funds, service provision, and the reimbursement of services. Service providers must adhere to the approved record retention and disposition schedule posted at https://www.ncdhhs.gov/about/administrative-offices/office-controller/records-retention by the NC Department of Health and Human Services Controller's Office, as well as the local government schedules posted by the NC Department of Natural and Culltural Resources at https://archives.ncdcr.gov/government/local

Service providers are not authorized to destroy records related to the provision of services under this Agreement except in compliance with the approved DHHS retention and disposition schedule, which allows for the proper destruction of records based on a schedule by funding source and fiscal year. The agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of record destruction. Confidential records will be destroyed in such a manner that the records cannot be practically read or reconstructed.

_____

(Authorized Signature) (Date)

Standard Assurance To Comply with Older Americans Act
Requirements Regarding Clients Rights
For
Agencies Providing In-Home Services through the
Home and Community Care Block Grant for Older Adults

As a provider of one or more of the services listed below, our agency agrees to notify all Home and Community Care Block Grant clients receiving any of the below listed services provided by this agency of their rights as a service recipient. Services in this assurance include:

- In-Home Aide
- Home Care (home health)
- Housing and Home Improvement
- Adult Day Care or Adult Day Health Care

Notification will include, at a minimum, an oral review of the information outlined below as well as providing each service recipient with a copy of the information in written form. In addition, providers of in-home services will establish a procedure to document that client rights information has been discussed with in-home services clients (e.g. copy of signed Client Bill of Rights statement).

Clients Rights information to be communicated to service recipients will include, at a minimum, the right to:

- be fully informed, in advance, about each in-home service to be provided and any change in service(s) that may affect the wellbeing of the participant;
- participate in planning and changing any in-home service provided unless the client is adjudicated incompetent;
- voice a grievance with respect to service that is or fails to be provided, without discrimination or reprisal as a result of voicing a grievance;
- confidentiality of records relating to the individual;
- have property treated with respect; and
- be fully informed both orally and in writing, in advance of receiving an in-home service, of the individual's rights and obligations.

Client Rights will be distributed to, and discussed with, each new client receiving one or more of the above listed services prior to the onset of service. For all existing clients, the above information will be provided no later than the next regularly scheduled service reassessment.

Agency Name: Cabarrus County DHS

Name of Agency Administrator: _____

Signature: _____

(Please return this form to your Area Agency on Aging and retain a copy for your files.)

CLIENT/PATIENT RIGHTS

1. You have the right to be fully informed of all your rights and responsibilities as a client/p the program.

2. You have the right to appropriate and professional care relating to your needs.

3. You have the right to be fully informed in advance about the care to be provided by the

4. You have the right to be fully informed in advance of any changes in the care that you n receiving and to give informed consent to the provision of the amended care.

5. You have the right to participate in determining the care that you will receive and in alte nature of the care as your needs change.

6. You have the right to voice your grievances with respect to care that is provided and to there will be no reprisal for the grievance expressed.

7. You have the right to expect that the information you share with the agency will be resp held in strict confidence, to be shared only with your written consent and as it relates to obtaining of other needed community services.

8. You have the right to expect the preservation of your privacy and respect for your prope

9. You have the right to receive a timely response to your request for service.

10. You shall be admitted for service only if the agency has the ability to provide safe and professional care at the level of intensity needed.

11. You have the right to be informed of agency policies, changes, and costs for services.

12. If you are denied service solely on you inability to pay, you have the right to be referrec elsewhere.

13. You have the right to honest, accurate information regarding the industry, agency and program in particular.

14. You have the right to be fully informed about other services provided by this agency.

Internal Consistency Checks

Review of Local Match Comparison Input Sheet vs. 732A Cash and In-Kind Totals

			Difference
Adult Day Health		OK	-
Congregate Nutrition		OK	-
In-Home Aide-Level II - Personal Care		OK	-
In-Home Aide-Level III - Personal Care		OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-

732A1 Labor Distribution Schedule Comparison of Assignable Salary To Overall Salary Entered

Total Assignable Salary and Cumulative Salary total for S	0	$	-

Exhibit 14A: List of Subcontractors

Region F - FY 2023

County: Cabarrus

Provider Name: Cabarrus DHS

Provider Code: F012

List each subcontractor in the chart below. A subcontractor is defined as an entity that has been contracted to do a job within the scope of the service provider's grant award. The subcontractor is accountable for the same requirements as the service provider, depending on the terms of the subcontract. Subcontractors must adhere to service standard requirements by the Division of Aging and Adult Services. Do not list vendors who provide services through a 'purchase of service'. These are services which do not follow prescribed service standards and are goods or services sold equally to all consumers.

Subcontractor Name	**Type Agency** ***Non-Profit For-Profit Government***	**Subcontracted Service Name**	**Subcontractor Contact Name, Address & Phone Number**	**Scope of the Subcontract** (Briefly describe any service requirements that will be delegated to the subcontractor, e.g. eligibility determination, service authorization, assessments/reassessments, preparation and delivery of meals, provision of a ride and driver/requirements, tasks on an In-Home Aide plan of care, aide competency testing, aide supervision,etc.)
Greater Home Health Services	**For-Profit**	In-Home Aide Services II & III	MiJe Nwangwu, 206 N. Cannon Blvd, Kannapolis, NC 28083 704-956-2478	Provision of In-Home Aide Services Level II & III
New Infiniti Health	**For-Profit**	In-Home Aide Services II & III	Crystal Stafford, 325 McGill Ave. NW, Concord, NC 28027	Provision of In-Home Aide Services Level II & III
Interim Homecare	For-Profit	In-Home Aide Services II & III	Julie Conrad, 250 Branchview Dr., Concord, NC 28025 704-788-3483	Provision of In-Home Aide Services Level II & III
Coltrane L.I.F.E. Center	Non-Profit	Adult Day Health	Susan Caudle, 321 Corban Ave. SW, Concord, NC 28025 704-788-1215	Provision of Adult Day Health Services
Trio Community Meals	For-Profit	Congregate Nutrition	Bob Santana, 300 S. Tryon St. Ste 400, Charlotte, NC 28202 704-424-1071	Preparation and delivery of meals to Congregate Nutrition sites

Attest Statement: Providers utilizing subcontractors must provide assurance that both for profit and non-profit subcontractors are compliant with state and federal regulations. These assurances are the subcontractor: A) has not been suspended or debarred (G.S. §143C-6-23; 09NCAC03M), B) has not been barred from doing business at the federal level, C) is able to produce a notarized "State Grant Certification of No Overdue Tax Debts", D) has obtained all licenses, permits, bonds and insurance necessary for carrying out HCCBG Services. In addition, Non-Profit Subcontractors are registered as a charitable (501c3) organization with the federal government.

Provider Signature: **Title: DHS Director** **Date:**

Version 2016

State Fiscal Year:	SFY 2022-2023
Provider Name:	Active Living and Parks
Address Line 1:	331 Corban Ave SE
Address Line 2:	Concord, NC 28025
County:	Cabarrus
Area Agency on Aging:	Centralina Council of Governments

	Please Select Services to Be Delivered		Federal/State	Local Match	
	Senior Center Operation	170	$ 100,973	$ 11,220	<<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	

Comparison of Fed/State Funding and Rates vs. Prior Year

Service		Prior Yr. Funding	Prior Year Rate	Current Yr Funding	Current Year Rate	Funding Diff.	Rate Diff.
Senior Center Operation	170	$ 100,973		$ 100,973	0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -

NC DIVISION OF AGING AND ADULT SERVICES COST OF SERVICES - LABOR DISTRIBUTION SCHEDULE DAAS-732A1

AGENCY NAME: Active Living and Parks

State Fiscal Year: SFY 2022-2023

Fiscal Period: July 2022 through June 2023

STAFF NAME	POSITION	TOTAL SALARY	FTE Equivalent	FULL TIME PART TIME	Assignable Salary	ADMIN. SALARY	SERVICE Senior Center Operation	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0
Newcomer	Program Asst	$ 39,978	8%	PART TIME	$ 3,198		$ 3,198					
Brindell	Wellness Supervisor	$ 48,277	8%	PART TIME	$ 3,862		$ 3,862					
Kiser	ALP Program Mgr	$ 53,685	8%	PART TIME	$ 4,295		$ 4,295					
Plummer	ALP Program Supervisor	$ 46,800	7%	PART TIME	$ 3,276		$ 3,276					
					$ -							
					$ -							
					$ -	

North Carolina Division of Aging and Adult Services`
Service Cost Computation Worksheet

DAAS-732A

Provider: Active Living and Parks
County: Cabarrus
Budget Period: July 2022 through June 2023

I. Projected Revenues	Grand Total		Service: Senior Center Operation 170	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A
A. Fed/State Funding From the Div. of Aging & Adult Svcs.	$ 100,973		$ 100,973	$ -	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - Cash									
1) County	$ 11,219		$ 11,219						
2)	$ -								
3)	$ -								
Total Required Minimum Match - Cash	$ 11,219		$ 11,219	$ -	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - In-Kind									
1)	$ -								
2)	$ -								
3)	$ -								
Total Required Minimum Match - In-Kind	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
B. Total Required Minimum Match (cash + in-kind)	$ 11,219		$ 11,219	$ -	$ -	$ -	$ -	$ -	$ -
C. **Subtotal, Fed/State/Required Match Revenues**	$ 112,192		$ 112,192	$ -	$ -	$ -	$ -	$ -	$ -
D. NSIP Cash Subsidy/Commodity Valuation	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
E. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -								
Local Cash, Non-Match									
1)	$ -								
2)	$ -								
3)	$ -								
4)	$ -								
F. **Subtotal, Local Cash, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
Other Revenues, Non-Match									
1)	$ -								
2)	$ -								
3)	$ -								
G. **Subtotal, Other Revenues, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
Local In-Kind Resources (Includes Volunteer Resources)									
1)	$ -								
2)	$ -								
3)	$ -								
H. **Subtotal, Local In-kind Resources, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
I. **Client Cost Sharing**	$ -								
J. **Total Projected Revenues (Sum I.C,D,E,F,G,H, & I)**	$ 112,192		$ 112,192	$ -	$ -	$ -	$ -	$ -	$ -

Division of Aging and Adult Services
Service Cost Computation Worksheet

II. Line Item Expenses	Grand Total	Admin. Cost	Service: Senior Center Operation 170	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A
Staff Salary From Labor Distribution Schedule									
1) Full-time Staff (do not include Title V workers)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
2) Part-time staff (do not include Title V workers)	$ 14,631	$ -	$ 14,631	$ -	$ -	$ -	$ -	$ -	$ -
A. **Subtotal, Staff Salary**	$ 14,631	$ -	$ 14,631	$ -	$ -	$ -	$ -	$ -	$ -
Fringe Benefits									
1) FICA @ 7.65 %	$ 1,119	$ -	$ 1,119	$ -	$ -	$ -	$ -	$ -	$ -
2) Health Insurance	$ -								
3) Retirement	$ -								
4) Unemployment Insurance	$ -								
5) Worker's Compensation	$ -								
6) Other	$ -								
B. **Subtotal, Fringe Benefits**	$ 1,119	$ -	$ 1,119	$ -	$ -	$ -	$ -	$ -	$ -
Local In-Kind Resources Non-Match									
1)	$ -								
2)	$ -								
3)	$ -								
C. **Subtotal, Local In-Kind Resources Non-Match**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
D. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -								
Travel									
1) Per Diem	$ -								
2) Mileage Reimbursement	$ -								
3) Other Travel Cost	$ -								
E. **Subtotal, Travel**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
General Operating Expenses									
1) various operation expenses	$ 96,442		$ 96,442						
2) details can be view throughout FY 23	$ -								
3)	$ -								
4)	$ -								
5)	$ -								
6)	$ -								
7)	$ -								
8)	$ -								
F. **Subtotal, General Operating Expenses**	$ 96,442	$ -	$ 96,442	$ -	$ -	$ -	$ -	$ -	$ -
G. **Subtotal, Other Administrative Cost Not Allocated in Lines II.A through E**	$ -								
H. **Total Proj. Expenses Prior to Admin. Distribution**	**$ 112,192**	**$ -**	**$ 112,192**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ 0**		**$ 0**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
J. **Total Proj. Expenses After Admin. Distribution**	**$ 112,192**		**$ 112,192**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**

III. Computation of Rates	Grand Total		Service: Senior Center Operation 170	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A
A. **Computation of Unit Cost Rate:**									
1. Total Expenses (equals line II.J)	$ 112,192		$ 112,192	$ -	$ -	$ -	$ -	$ -	$ -
2. Total Projected Units									
3. Total Unit Cost Rate			$ -	$ -	$ -	$ -	$ -	$ -	$ -
B. **Computation of Reimbursement Rate:**									
1. Total Revenues (equals line I.J)	$ 112,192		$ 112,192	$ -	$ -	$ -	$ -	$ -	$ -
2. Less: NSIP (equals line I.D)	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
Title V (equals line I.E less II.D)	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
Non Match In-Kind (equals line I.H less II.C)	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -
3. Revenues Subject to Unit Reimbursement	$ 112,192		$ 112,192	$ -	$ -	$ -	$ -	$ -	$ -
4. Total Projected Units (equals line III.A.2)			-	-	-	-	-	-	-
5. Total Reimbursement Rate			$ -	$ -	$ -	$ -	$ -	$ -	$ -
C. **Units Reimbursed Through HCCBG**			-	-	-	-	-	-	-
D. **Units Reimbursed Through Program Income***			-	-	-	-	-	-	-
E. **Units Reimbursed Through Remaining Revenues**			-	-	-	-	-	-	-
F. **Total Units Reimbursed/Total Projected Units**			-	-	-	-	-	-	-

* The Division of Aging ARMS deducts reported program income from reimbursement paid to providers. Line III.D indicates the number of units that will have to be produced in addition to those stated on line III.C in order to earn the net revenues stated on line I.C.

Certification:

I certify to the best of my knowledge and belief that the information included in the cost computation above is accurate and complies with all laws and regulations. I also understand that material deviations in reported cost information could limit funding, and also result in return of funds if the error or omission results in a higher than actual reported cost.

Authorized Signature | Title | Date

Information on this form (DAAS-732A) corresponds with information stated on the Provider Services Summary (DAAS-732) as follows:

	DAAS-732A	DAAS-732
Block Grant Funding	Line I.A	Col. A
Required Local Match-Cash & In-Kind	Line I.B	Col. B
Net Service Cost	Line I.C	Col. C
NSIP Subsidy	Line I.D	Col. D
Total Funding	L. I.C+I.D	Col. E
Projected HCCBG Reimbursed Units	Line III.C	Col. F
Total Reimbursement Rate	Line III.B.5	Col. G
Projected Total Service Units	Line III.F	Col. I

Home and Community Care Block Grant for Older Adults

Active Living and Parks

P O Box 707

Concord NC 28026-0707

County Funding Plan

Provider Services Summary

DAAS-732

County: Cabarrus

Budget Period: July 2019 through June 2020

Revision #: **Date:**

Services	Serv. Delivery (Check One) Direct	Purchase	A Block Grant Funding Access	In-Home	Other	Total	B Required Local Match	C Net Service Cost	D NSIP Subsidy	E Total Funding	F Projected HCCBG Units	G Projected Reimburse Rate*	H Projected HCCBG Clients	I Projected Total Units
Senior Center Operation			$ -	$ -	$ 89,522	$ 89,522	$ 9,947	$ 99,469	$ -	$ 99,469	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
Total			$ -	$ -	$ 89,522	$ 89,522	$ 9,947	$ 99,469	$ -	$ 99,469	-		-	-

***Adult Day Care & Adult Day Health Care Proj. Service Cost/Rate**

	ADC	ADHC
Daily Care	$33.07	$ 40.00
Administrative		
Proj. Reimbursement Rate	$33.07	$ 40.00
Administrative %	0.00%	0.00%

Certification of required minimum local match availability. Required local match will be expended simultaneously with Block Grant Funding.

Signature, County Finance Officer Date

Authorized Signature, Title Date
Community Service Provider

Signature, Chairman, Board of Commissioners Date

DAAS-733
(Rev. 2/19)

Home and Community Care Block Grant for Older Adults
Outreach Methodology

July 2022 through June 2023

Outreach Methodology to Address the Service Needs of Target Population

Community Service Provider: Active Living and Parks

County: Cabarrus

While all older adults age 60 and over are eligible for services, sec. 305(a)(2)(E) of the Older Americans Act requires programs to target services to older individuals with the greatest economic and social need, (with particular attention to low-income older adults, including low-income minority older adults, older adults with limited English proficiency, and older adults residing in rural areas). The community service provider shall specify how these service needs will be met through the services identified on the Provider Services Summary (DAAS-732). This narrative shall address outreach and service delivery methodologies that will ensure that this target population is adequately served and conform with specific objectives established by the Area Agency on Aging, for providing services to low income minority individuals. Additional pages may be used as necessary.

Approximately 5000 copies of the printed news magazine are distributed three times per year and is also available on the Cabarrus County Website.
Referrals are provided to the Human Services Department and received from various local providers
Brochures are distributed throughout the community that promote programs provided by our agency
Programs are promoted through local churches and through speaking presentations to older adults and local civic groups
Programs are provided to a variety of satellite locations (churches, recreation centers, YMCAs, etc.) throughout the county, including rural and low-income areas.

July 2022 through June 2023

Home and Community Care Block Grant for Older Adults
Community Service Provider
Standard Assurances

Active Living and Parks agrees to provide services through the Home and Community Care Block Grant, as specified on the Provider Services Summary (DAAS-732) in accordance with the following:

1. Services shall be provided in accordance with requirements set forth in:
   a) The County Funding Plan;
   b) The Division of Aging and Adult Services Home and Community Care Block Grant Procedures Manual for Community Service Providers; and
   c) The Division of Aging and Adult Services Standards at
   https://www.ncdhhs.gov/divisions/daas/monitoring
   Community service providers shall monitor any subcontracts with providers of Block Grant services and take appropriate measures to ensure that services are provided in accordance with the aforementioned documents.

2. Priority shall be given to providing services to those older persons with the greatest economic or social needs. The service needs of low-income minority elderly will be addressed in the manner specified on the Outreach Methodology to Address Service Needs of Target Population (DAAS-733).

3. The following service authorization activities will be carried out in conjunction with all services provided through the Block Grant:
   a) Eligibility determination;
   b) Client intake/registration;
   c) Client assessment/reassessments and quarterly visits, as appropriate;
   d) Determining the amount of services to be received by the client; and
   e) Reviewing consumer contributions policies with eligible clients.

4. All licenses, permits, bonds, and insurance necessary for carrying out Block Grant Services will be maintained by the community service provider and any subcontracted providers.

5. As specified in 45 CFR 75, Subpart D-Post Federal Award Requirements, Procurement Standards, community service providers shall have procedures for settling all contractual and administrative issues arising out of procurement of services through the Block Grant. Community service providers shall have procedures governing the evaluation of bids for services and procedures through which bidders and contracted providers may appeal or dispute a decision made by the community service provider.

6. Applicant/Client appeals shall be addressed as specified in Section 7 of the Division of Aging and Adult Services Home and Community Care Block Grant Manual for Community Service Providers.

7. Community service providers are responsible for providing or arranging for the provision of required local match, as specified on the Provider Services Summary, (DAAS-732). Local match shall be expended simultaneously with Block Grant funding.

8. Community service providers agree to comply with audit and fiscal reporting requirements as specified in the Agreement for the Provision of County-Based Aging Services (DAAS-735).

9. Compliance with Equal Employment Opportunity and Americans with Disabilities Act requirements, as specified in paragraph fourteen (14) of the Agreement for the Provision of County-Based Aging Services (DAAS-735) shall be maintained.

10. Providers of In-Home Aide, Home Health, Housing and Home Improvement, and Adult Day Care or Adult Day Health Care shall sign and return the attached assurance to the area agency on aging indicating that recipients of these services have been informed of their client rights, as required in Section 314 of the 2006 Amendments to the Older Americans Act (DAAS-734 Standard Assurances Regarding In-Home Client Rights).

11. Subcontracting – All HCCBG community service providers must assure that subcontractors (for-profit and non-profit entities only) meet the following requirements:

a. The subcontractor has not been suspended or debarred. (N.C.G.S. §143C-6-23, 09 NCAC 03M)
b. The subcontractor has not been barred from doing business at the federal level.
c. The subcontractor is able to produce a notarized "State Grant Certification of No Overdue Tax Debts."

d. All licenses, permits, bonds and insurance necessary for carrying out Home and Community Care Block Grant services will be maintained by both the community service provider and any subcontractors.

e. The subcontractor is registered as a charitable, tax-exempt (501c3) organization with the Internal Revenue Service (non-profit subcontractors only).

12. Confidentiality and Security. Per the requirements in 10A NCAC 05J and Section 6 of the Home and Community Care Block Grant Procedures Manual, client information in any format and whether recorded or not shall be kept confidential and not disclosed in a form that identifies the person without the informed consent of the person or legal representative. Community service providers, including subcontractors and vendors, must adhere to all applicable federal, state and departmental requirements for protecting the security and confidentiality of client information including but not limited to appropriately restricting access, establishing procedures to reduce the risk of accidental disclosures from data processing systems, and developing a process by which the Division of Adult Aging Services is notified of suspected or confirmed security incidents and data breaches.

13. Record Retention and Disposition. All community service providers are responsible for maintaining custody of records and documentation to support the allowable expenditure of funds, service provision, and the reimbursement of services. Service providers must adhere to the approved record retention and disposition schedule posted at https://www.ncdhhs.gov/about/administrative-offices/office-controller/records-retention by the NC Department of Health and Human Services Controller's Office, as well as the local government schedules posted by the NC Department of Natural and Culltural Resources at https://archives.ncdcr.gov/government/local

Service providers are not authorized to destroy records related to the provision of services under this Agreement except in compliance with the approved DHHS retention and disposition schedule, which allows for the proper destruction of records based on a schedule by funding source and fiscal year. The agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of record destruction. Confidential records will be destroyed in such a manner that the records cannot be practically read or reconstructed.

_____

(Authorized Signature) (Date)

b. The subcontractor has not been barred from doing business at the federal level.

c. The subcontractor is able to produce a notarized "State Grant Certification of No Overdue Tax Debts."

d. All licenses, permits, bonds and insurance necessary for carrying out Home and Community Care Block Grant services will be maintained by both the community service provider and any subcontractors.

e. The subcontractor is registered as a charitable, tax-exempt (501c3) organization with the Internal Revenue Service (non-profit subcontractors only).

12. Confidentiality and Security. Per the requirements in 10A NCAC 05J and Section 6 of the Home and Community Care Block Grant Procedures Manual, client information in any format and whether recorded or not shall be kept confidential and not disclosed in a form that identifies the person without the informed consent of the person or legal representative. Community service providers, including subcontractors and vendors, must adhere to all applicable federal, state and departmental requirements for protecting the security and confidentiality of client information including but not limited to appropriately restricting access, establishing procedures to reduce the risk of accidental disclosures from data processing systems, and developing a process by which the Division of Adult Aging Services is notified of suspected or confirmed security incidents and data breaches.

13.

Record Retention and Disposition. All community service providers are responsible for maintaining custody of records and documentation to support the allowable expenditure of funds, service provision, and the reimbursement of services. Service providers must adhere to the approved record retention and disposition schedule posted semiannually on the website of the NC Department of Health and Human Services Controller at .
http://www.ncdhhs.gov/control/retention/retention.htm

Service providers are not authorized to destroy records related to the provision of services under this Agreement except in compliance with the approved DHHS retention and disposition schedule, which allows for the proper destruction of records based on a schedule by funding source and fiscal year. The agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of record destruction. Confidential records will be destroyed in such a manner that the records cannot be practically read or reconstructed.

Fonda Strong 5/29/19

(Authorized Signature) (Date)

CLIENT/PATIENT RIGHTS

1. You have the right to be fully informed of all your rights and responsibilities as a client/p the program.

2. You have the right to appropriate and professional care relating to your needs.

3. You have the right to be fully informed in advance about the care to be provided by the

4. You have the right to be fully informed in advance of any changes in the care that you r receiving and to give informed consent to the provision of the amended care.

5. You have the right to participate in determining the care that you will receive and in alte nature of the care as your needs change.

6. You have the right to voice your grievances with respect to care that is provided and to there will be no reprisal for the grievance expressed.

7. You have the right to expect that the information you share with the agency will be resp held in strict confidence, to be shared only with your written consent and as it relates to obtaining of other needed community services.

8. You have the right to expect the preservation of your privacy and respect for your prope

9. You have the right to receive a timely response to your request for service.

10. You shall be admitted for service only if the agency has the ability to provide safe and professional care at the level of intensity needed.

11. You have the right to be informed of agency policies, changes, and costs for services.

12. If you are denied service solely on you inability to pay, you have the right to be referre elsewhere.

13. You have the right to honest, accurate information regarding the industry, agency and program in particular.

14. You have the right to be fully informed about other services provided by this agency.

Internal Consistency Checks

Review of Local Match Comparison Input Sheet vs. 732A Cash and In-Kind Totals

			Difference
Senior Center Operation		OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-

732A1 Labor Distribution Schedule Comparison of Assignable Salary To Overall Salary Entered

Total Assignable Salary and Cumulative Salary total for Se	0	$	-

State Fiscal Year:	SFY 2022-2023
Provider Name:	Cabarrus County Planning & Development
Address Line 1:	PO Box 707
Address Line 2:	Concord, NC 28026
County:	Cabarrus
Area Agency on Aging:	Centralina Council of Governments

	Please Select Services to Be Delivered		Federal/State	Local Match	
	Housing & Home Improvement	140	$ 50,862	$ 5,652	<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	

Comparison of Fed/State Funding and Rates vs. Prior Year

Service		Prior Yr. Funding	Prior Year Rate	Current Yr Funding	Current Year Rate	Funding Diff.	Rate Diff.
Housing & Home Improvement	140	$ 50,862		$ 50,862	0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -

NC DIVISION OF AGING AND ADULT SERVICES COST OF SERVICES - LABOR DISTRIBUTION SCHEDULE DAAS-732A1

AGENCY NAME: Cabarrus County Planning & Development

Fiscal Period: July 2022 through June 2023

State Fiscal Year: SFY 2022-2023

STAFF NAME	POSITION	TOTAL SALARY	FTE Equivalent	FULL TIME PART TIME	Assignable Salary	ADMIN. SALARY	SERVICE Housing & Home Improvement	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0
Brian Helms	Weatherization Auditor/Mechanic	$ 46,176	0.1299	PART TIME	$ 5,998		$ 5,998						
Thomas King	Weatherization Auditor/Mechanic	$ 41,683	0.1439	PART TIME	$ 5,998		$ 5,998						
					$ -								
					$ -								
					$ -	

North Carolina Division of Aging and Adult Services` DAAS-732A

Service Cost Computation Worksheet

Provider: Cabarrus County Planning & Development
County: Cabarrus
Budget Period: July 2022 through June 2023

I. Projected Revenues	Grand Total		Service: Housing & Home Improvement 140	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A
A. Fed/State Funding From the Div. of Aging & Adult Svcs.	$ 50,862		$ 50,862	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - Cash								
1) General Fund cash match	$ 5,651		$ 5,651					
2)	$ -							
3)	$ -							
Total Required Minimum Match - Cash	$ 5,651		$ 5,651	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - In-Kind								
1)	$ -							
2)	$ -							
3)	$ -							
Total Required Minimum Match - In-Kind	$ -		$ -	$ -	$ -	$ -	$ -	$ -
B. Total Required Minimum Match (cash + in-kind)	$ 5,651		$ 5,651	$ -	$ -	$ -	$ -	$ -
C. **Subtotal, Fed/State/Required Match Revenues**	$ 56,513		$ 56,513	$ -	$ -	$ -	$ -	$ -
D. NSIP Cash Subsidy/Commodity Valuation	$ -		$ -	$ -	$ -	$ -	$ -	$ -
E. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -							
Local Cash, Non-Match								
1)	$ -							
2)	$ -							
3)	$ -							
4)	$ -							
F. **Subtotal, Local Cash, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -
Other Revenues, Non-Match								
1)	$ -							
2)	$ -							
3)	$ -							
G. **Subtotal, Other Revenues, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -
Local In-Kind Resources (Includes Volunteer Resources)								
1)	$ -							
2)	$ -							
3)	$ -							
H. **Subtotal, Local In-kind Resources, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -
I. **Client Cost Sharing**	$ 150		$ 150					
J. **Total Projected Revenues (Sum I.C,D,E,F,G,H, & I)**	$ 56,663		$ 56,663	$ -	$ -	$ -	$ -	$ -

Division of Aging and Adult Services
Service Cost Computation Worksheet

II. Line Item Expenses	Grand Total	Admin. Cost	Service Housing & Home Improvement 140	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A
Staff Salary From Labor Distribution Schedule								
1) Full-time Staff (do not include Title V workers)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
2) Part-time staff (do not include Title V workers)	$ 11,996	$ -	$ 11,996	$ -	$ -	$ -	$ -	$ -
A. **Subtotal, Staff Salary**	$ 11,996	**$ -**	**$ 11,996**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Fringe Benefits								
1) FICA @ 7.65 %	$ 918	$ -	$ 918	$ -	$ -	$ -	$ -	$ -
2) Health Insurance	$ -							
3) Retirement	$ -							
4) Unemployment Insurance	$ -							
5) Worker's Compensation	$ -							
6) Other	$ -							
B. **Subtotal, Fringe Benefits**	$ 918	$ -	$ 918	$ -	$ -	$ -	$ -	$ -
Local In-Kind Resources Non-Match								
1)	$ -							
2)	$ -							
3)	$ -							
C. **Subtotal, Local In-Kind Resources Non-Match**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
D. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -							
Travel								
1) Per Diem	$ -							
2) Mileage Reimbursement	$ -							
3) Other Travel Cost	$ -							
E. **Subtotal, Travel**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
General Operating Expenses								
1) Appliances Repairs and Replacements	$ 22,648		$ 22,648					
2) Home Repairs	$ 11,359		$ 11,359					
3) Modifications/Accessibility	$ 10,356		$ 10,356					
4) Security	$ 150		$ 150					
5)	$ -							
6)	$ -							
7)	$ -							
8)	$ -							
F. **Subtotal, General Operating Expenses**	$ 44,513	$ -	$ 44,513	$ -	$ -	$ -	$ -	$ -
G. **Subtotal, Other Administrative Cost Not Allocated in Lines II.A through E**	$ -							
H. **Total Proj. Expenses Prior to Admin. Distribution**	**$ 57,427**	**$ -**	**$ 57,427**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ 764**		**$ 764**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
J. **Total Proj. Expenses After Admin. Distribution**	**$ 56,663**		**$ 56,663**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**

III. Computation of Rates	Grand Total		Service Housing & Home Improvement 140	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A
A. **Computation of Unit Cost Rate:**								
1. Total Expenses (equals line II.J)	$ 56,663		$ 56,663	$ -	$ -	$ -	$ -	$ -
2. Total Projected Units								
3. Total Unit Cost Rate			$ -	$ -	$ -	$ -	$ -	$ -
B. **Computation of Reimbursement Rate:**								
1. Total Revenues (equals line I.J)	$ 56,663		$ 56,663	$ -	$ -	$ -	$ -	$ -
2. Less: NSIP (equals line I.D)	$ -		$ -	$ -	$ -	$ -	$ -	$ -
Title V (equals line I.E less II.D)	$ -		$ -	$ -	$ -	$ -	$ -	$ -
Non Match In-Kind (equals line I.H less II.C)	$ -		$ -	$ -	$ -	$ -	$ -	$ -
3. Revenues Subject to Unit Reimbursement	$ 56,663		$ 56,663	$ -	$ -	$ -	$ -	$ -
4. Total Projected Units (equals line III.A.2)			-	-	-	-	-	-
5. Total Reimbursement Rate			$ -	$ -	$ -	$ -	$ -	$ -
C. **Units Reimbursed Through HCCBG**			-	-	-	-	-	-
D. **Units Reimbursed Through Program Income***			-	-	-	-	-	-

E. **Units Reimbursed Through Remaining Revenues**			-	-	-	-	-	-
F. **Total Units Reimbursed/Total Projected Units**			-	-	-	-	-	-

* The Division of Aging ARMS deducts reported program income from reimbursement paid to providers. Line III.D indicates the number of units that will have to be produced in addition to those stated on line III.C in order to earn the net revenues stated on line I.C.

Certification:

I certify to the best of my knowledge and belief that the information included in the cost computation above is accurate and complies with all laws and regulations. I also understand that material deviations in reported cost information could limit funding, and also result in return of funds if the error or omission results in a higher than actual reported cost.

Authorized Signature	Title	Date

Information on this form (DAAS-732A) corresponds with information stated on the Provider Services Summary (DAAS-732) as follows:

	DAAS-732A	DAAS-732
Block Grant Funding	Line I.A	Col. A
Required Local Match-Cash & In-Kind	Line I.B	Col. B
Net Service Cost	Line I.C	Col. C
NSIP Subsidy	Line I.D	Col. D
Total Funding	L. I.C+I.D	Col. E
Projected HCCBG Reimbursed Units	Line III.C	Col. F
Total Reimbursement Rate	Line III.B.5	Col. G
Projected Total Service Units	Line III.F	Col. I

Home and Community Care Block Grant for Older Adults

Cabarrus County Planning & Development

PO Box 707

Concord, NC 28026

County Funding Plan

Provider Services Summary

DAAS-732

County: Cabarrus

Budget Period: July 2022 through June 2023

Revision #: **Date:**

Services	Serv. Delivery (Check One) Direct	Purchase	A Block Grant Funding Access	In-Home	Other	Total	B Required Local Match	C Net Service Cost	D NSIP Subsidy	E Total Funding	F Projected HCCBG Units	G Projected Reimburse Rate	H Projected HCCBG Clients	I Projected Total Units
Housing & Home Improvement	x		$ -	$ -	$ 50,862	$ 50,862	$ 5,651	$ 56,513	$ -	$ 56,513	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
Total			$ -	$ -	$ 50,862	$ 50,862	$ 5,651	$ 56,513	$ -	$ 56,513	-		-	-

Certification of required minimum local match availability. Required local match will be expended simultaneously with Block Grant Funding.

Authorized Signature, Title — Date

Community Service Provider

Signature, County Finance Officer — Date

Signature, Chairman, Board of Commissioners — Date

DAAS-733
(Rev. 2/19)

Home and Community Care Block Grant for Older Adults
Outreach Methodology

July 2022 through June 2023

Outreach Methodology to Address the Service Needs of Target Population

Community Service Provider: Cabarrus County Planning & Development

County: Cabarrus

While all older adults age 60 and over are eligible for services, sec. 305(a)(2)(E) of the Older Americans Act requires programs to target services to older individuals with the greatest economic and social need, (with particular attention to low-income older adults, including low-income minority older adults, older adults with limited English proficiency, and older adults residing in rural areas). The community service provider shall specify how these service needs will be met through the services identified on the Provider Services Summary (DAAS-732). This narrative shall address outreach and service delivery methodologies that will ensure that this target population is adequately served and conform with specific objectives established by the Area Agency on Aging, for providing services to low income minority individuals. Additional pages may be used as necessary.

The Planning and Development Department's goal is to coordinate and provide Housing and Home Improvement services in conjunction with the Department of Human Services that is funded by the Home and Community Care Block Grant. Coordination of this function will produce a service product that is both accountable and accessible by the full scope of clients for which the HCCBG funds were designated. It is our intent to meet the needs of that specialized population. The Planning and Development Department will coordinate with the Department of Human Services and other service providers to ensure that the population is served. All eligible clients will be provided access to service. The Planning and Development Department will follow all program guidelines for service provision and client treatment. Homes will be modified or repaired for eligible clients. Improvements include, but are not limited to, handicap accessibility im[provements, door widenings, minor repairs of roofs, plumbing, and hvac, as well as other safety improvements. Any improvements will be made in compliance with all program regulations. The Planning and Development Department will take referrals from the Department of Human Services and other service providers of the target population. Outreach is achieved through other service programs, word of mouth, Channel 22, the county website, nutrition sites, and other special programs designed to address the target population.

July 2022 through June 2023

Home and Community Care Block Grant for Older Adults
Community Service Provider
Standard Assurances

Cabarrus County Planning & Development agrees to provide services through the Home and Community Care Block Grant, as specified on the Provider Services Summary (DAAS-732) in accordance with the following:

1. Services shall be provided in accordance with requirements set forth in:
   a) The County Funding Plan;

   b) The Division of Aging and Adult Services Home and Community Care Block Grant Procedures Manual for Community Service Providers; and

   c) The Division of Aging and Adult Services Standards at

   https://www.ncdhhs.gov/divisions/daas/monitoring

   Community service providers shall monitor any subcontracts with providers of Block Grant services and take appropriate measures to ensure that services are provided in accordance with the aforementioned documents.

2. Priority shall be given to providing services to those older persons with the greatest economic or social needs. The service needs of low-income minority elderly will be addressed in the manner specified on the Outreach Methodology to Address Service Needs of Target Population (DAAS-733).

3. The following service authorization activities will be carried out in conjunction with all services provided through the Block Grant:
   a) Eligibility determination;
   b) Client intake/registration;
   c) Client assessment/reassessments and quarterly visits, as appropriate;
   d) Determining the amount of services to be received by the client; and
   e) Reviewing consumer contributions policies with eligible clients.

4. All licenses, permits, bonds, and insurance necessary for carrying out Block Grant Services will be maintained by the community service provider and any subcontracted providers.

5. As specified in 45 CFR 75, Subpart D-Post Federal Award Requirements, Procurement Standards, community service providers shall have procedures for settling all contractual and administrative issues arising out of procurement of services through the Block Grant. Community service providers shall have procedures governing the evaluation of bids for services and procedures through which bidders and contracted providers may appeal or dispute a decision made by the community service provider.

6. Applicant/Client appeals shall be addressed as specified in Section 7 of the Division of Aging and Adult Services Home and Community Care Block Grant Manual for Community Service Providers.

7. Community service providers are responsible for providing or arranging for the provision of required local match, as specified on the Provider Services Summary, (DAAS-732). Local match shall be expended simultaneously with Block Grant funding.

8. Community service providers agree to comply with audit and fiscal reporting requirements as specified in the Agreement for the Provision of County-Based Aging Services (DAAS-735).

9. Compliance with Equal Employment Opportunity and Americans with Disabilities Act requirements, as specified in paragraph fourteen (14) of the Agreement for the Provision of County-Based Aging Services (DAAS-735) shall be maintained.

10. Providers of In-Home Aide, Home Health, Housing and Home Improvement, and Adult Day Care or Adult Day Health Care shall sign and return the attached assurance to the area agency on aging indicating that recipients of these services have been informed of their client rights, as required in Section 314 of the 2006 Amendments to the Older Americans Act (DAAS-734 Standard Assurances Regarding In-Home Client Rights).

11. Subcontracting – All HCCBG community service providers must assure that subcontractors (for-profit and non-profit entities only) meet the following requirements:

a. The subcontractor has not been suspended or debarred. (N.C.G.S. §143C-6-23, 09 NCAC 03M)
b. The subcontractor has not been barred from doing business at the federal level.
c. The subcontractor is able to produce a notarized "State Grant Certification of No Overdue Tax Debts."

d. All licenses, permits, bonds and insurance necessary for carrying out Home and Community Care Block Grant services will be maintained by both the community service provider and any subcontractors.

e. The subcontractor is registered as a charitable, tax-exempt (501c3) organization with the Internal Revenue Service (non-profit subcontractors only).

12. Confidentiality and Security. Per the requirements in 10A NCAC 05J and Section 6 of the Home and Community Care Block Grant Procedures Manual, client information in any format and whether recorded or not shall be kept confidential and not disclosed in a form that identifies the person without the informed consent of the person or legal representative. Community service providers, including subcontractors and vendors, must adhere to all applicable federal, state and departmental requirements for protecting the security and confidentiality of client information including but not limited to appropriately restricting access, establishing procedures to reduce the risk of accidental disclosures from data processing systems, and developing a process by which the Division of Adult Aging Services is notified of suspected or confirmed security incidents and data breaches.

13. Record Retention and Disposition. All community service providers are responsible for maintaining custody of records and documentation to support the allowable expenditure of funds, service provision, and the reimbursement of services. Service providers must adhere to the approved record retention and disposition schedule posted at https://www.ncdhhs.gov/about/administrative-offices/office-controller/records-retention by the NC Department of Health and Human Services Controller's Office, as well as the local government schedules posted by the NC Department of Natural and Culltural Resources at https://archives.ncdcr.gov/government/local

Service providers are not authorized to destroy records related to the provision of services under this Agreement except in compliance with the approved DHHS retention and disposition schedule, which allows for the proper destruction of records based on a schedule by funding source and fiscal year. The agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of record destruction. Confidential records will be destroyed in such a manner that the records cannot be practically read or reconstructed.

_____

(Authorized Signature) (Date)

Standard Assurance To Comply with Older Americans Act
Requirements Regarding Clients Rights
For
Agencies Providing In-Home Services through the
Home and Community Care Block Grant for Older Adults

As a provider of one or more of the services listed below, our agency agrees to notify all Home and Community Care Block Grant clients receiving any of the below listed services provided by this agency of their rights as a service recipient. Services in this assurance include:

- In-Home Aide
- Home Care (home health)
- Housing and Home Improvement
- Adult Day Care or Adult Day Health Care

Notification will include, at a minimum, an oral review of the information outlined below as well as providing each service recipient with a copy of the information in written form. In addition, providers of in-home services will establish a procedure to document that client rights information has been discussed with in-home services clients (e.g. copy of signed Client Bill of Rights statement).

Clients Rights information to be communicated to service recipients will include, at a minimum, the right to:

- be fully informed, in advance, about each in-home service to be provided and any change in service(s) that may affect the wellbeing of the participant;
- participate in planning and changing any in-home service provided unless the client is adjudicated incompetent;
- voice a grievance with respect to service that is or fails to be provided, without discrimination or reprisal as a result of voicing a grievance;
- confidentiality of records relating to the individual;
- have property treated with respect; and
- be fully informed both orally and in writing, in advance of receiving an in-home service, of the individual's rights and obligations.

Client Rights will be distributed to, and discussed with, each new client receiving one or more of the above listed services prior to the onset of service. For all existing clients, the above information will be provided no later than the next regularly scheduled service reassessment.

Agency Name: Cabarrus County Planning & Development

Name of Agency Administrator: _____

Signature: _____

(Please return this form to your Area Agency on Aging and retain a copy for your files.)

CLIENT/PATIENT RIGHTS

1. You have the right to be fully informed of all your rights and responsibilities as a client/patie the program.

2. You have the right to appropriate and professional care relating to your needs.

3. You have the right to be fully informed in advance about the care to be provided by the prc

4. You have the right to be fully informed in advance of any changes in the care that you may receiving and to give informed consent to the provision of the amended care.

5. You have the right to participate in determining the care that you will receive and in alterinç nature of the care as your needs change.

6. You have the right to voice your grievances with respect to care that is provided and to exp there will be no reprisal for the grievance expressed.

7. You have the right to expect that the information you share with the agency will be respect held in strict confidence, to be shared only with your written consent and as it relates to the obtaining of other needed community services.

8. You have the right to expect the preservation of your privacy and respect for your property

9. You have the right to receive a timely response to your request for service.

10. You shall be admitted for service only if the agency has the ability to provide safe and professional care at the level of intensity needed.

11. You have the right to be informed of agency policies, changes, and costs for services.

12. If you are denied service solely on you inability to pay, you have the right to be referred elsewhere.

13. You have the right to honest, accurate information regarding the industry, agency and of t program in particular.

14. You have the right to be fully informed about other services provided by this agency.

Internal Consistency Checks

Review of Local Match Comparison Input Sheet vs. 732A Cash and In-Kind Totals

			Difference
Housing & Home Improvement		OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-

732A1 Labor Distribution Schedule Comparison of Assignable Salary To Overall Salary Entered

Total Assignable Salary and Cumulative Salary total for Se	0	$	-

State Fiscal Year:	SFY 2022-2023
Provider Name:	Cabarrus County
Address Line 1:	1303 South Cannon Blvd
Address Line 2:	Kannapolis NC
County:	CABARRUS
Area Agency on Aging:	Centralina Council of Governments

	Please Select Services to Be Delivered		Federal/State	Local Match	
	Transportation (General)	250	$ 90,198	$ 10,022	<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
	Transportation (Medical)	033	$ 144,468	$ 16,052	<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	

Comparison of Fed/State Funding and Rates vs. Prior Year

Service		Prior Yr. Funding	Prior Year Rate	Current Yr Funding	Current Year Rate	Funding Diff.	Rate Diff.
Transportation (General)	250			$ 90,198	19.1552	$ 90,198	$ 19.1552
Transportation (Medical)	033			$ 144,468	19.1551	$ 144,468	$ 19.1551
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -

NC DIVISION OF AGING AND ADULT SERVICES COST OF SERVICES - LABOR DISTRIBUTION SCHEDULE DAAS-732A1

AGENCY NAME: Cabarrus County

State Fiscal Year: SFY 2022-2023

Fiscal Period: July 2022 through June 2023

STAFF NAME	POSITION	TOTAL SALARY	FTE Equivalent	FULL TIME PART TIME	Assignable Salary	ADMIN. SALARY	SERVICE Transportation (General)	SERVICE Transportation (Medical)	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0
V Johnson	Fleet Support Coord	$ 46,883	1	FULL TIME	$ 46,883	$ 46,883							
L Belk	Transportation Clerk	$ 45,802	1	FULL TIME	$ 45,802	$ 45,802							
R Bushey	Transportation Mgr	$ 66,477	1	FULL TIME	$ 66,477	$ 66,477							
A Mabry	Dispatch	$ 35,006	1	FULL TIME	$ 35,006	$ 35,006							
J Smith	Supervisor	$ 46,987	1	FULL TIME	$ 46,987	$ 46,987							
R Wright	Driver	$ 39,250	1	FULL TIME	$ 39,250		$ 21,587	$ 17,663					
J Freeze	Supervisor	$ 46,862	1	FULL TIME	$ 46,862	$ 46,862							
G Love	dispatch	$ 36,504	1	FULL TIME	$ 36,504	$ 36,504							
				PART TIME	#VALUE!	$ -							
				PART TIME	#VALUE!	$ -							
				PART TIME	#VALUE!	$ -							
C Ratliff	Operations Supervisor	$ 53,747	1	FULL TIME	$ 53,747	$ 53,747							
C Caldwell	Driver	$ 36,130	1	FULL TIME	$ 36,130		$ 19,871	$ 16,259					
G Igo	Driver	$ 33,363	1	FULL TIME	$ 33,363		$ 18,349	$ 15,014					
J Norris	Driver	$ 33,842	1	FULL TIME	$ 33,842		$ 18,613	$ 15,229					
P Griffiths	Driver	$ 32,635	1	FULL TIME	$ 32,635		$ 17,949	$ 14,686					
W Adkins	Driver	$ 32,947	1	FULL TIME	$ 32,947		$ 18,120	$ 14,827					
D Irvin	Driver	$ 33,280	1	FULL TIME	$ 33,280		$ 18,304	$ 14,976					
Vacant	Driver	$ 32,303	1	FULL TIME	$ 32,303		$ 17,766	$ 14,537					
T Cunningham	Driver	$ 32,635	1	FULL TIME	$ 32,635		$ 17,949	$ 14,686					
S Bowles	Driver	$ 33,280	1	FULL TIME	$ 33,280		$ 18,304	$ 14,976					
R Wilson	Driver	$ 33,280	1	FULL TIME	$ 33,280		$ 18,304	$ 14,976					
A Stokes	Driver	$ 32,510	1	FULL TIME	$ 32,510		$ 17,880	$ 14,630					
D Sims	Driver	$ 32,843	1	FULL TIME	$ 32,843		$ 18,063	$ 14,780					
J Ledbetter	Driver	$ 31,554	1	FULL TIME	$ 31,554		$ 17,354	$ 14,200					
M Waldo	Driver	$ 32,198	1	FULL TIME	$ 32,198		$ 17,708	$ 14,490					
D Williams	Driver	$ 33,218	1	FULL TIME	$ 33,218		$ 18,269	$ 14,949					
B Byers	Driver	$ 32,386	1	FULL TIME	$ 32,386		$ 17,812	$ 14,574					
T Meloling	Driver	$ 31,720	1	FULL TIME	$ 31,720		$ 17,446	$ 14,274					
T Carroll	Driver	$ 32,136	1	FULL TIME	$ 32,136		$ 17,674	$ 14,462					
M Byers	Driver	$ 31,886	1	FULL TIME	$ 31,886		$ 17,537	$ 14,349					
T. Talbert	Driver	$ 31,200	0.5	PART TIME	$ 15,600		$ 8,580	$ 7,020					
S.Parker	Driver	$ 21,359	0.5	PART TIME	$ 10,680		$ 5,874	$ 4,806					
E. Ellison	Driver	$ 20,791	0.5	PART TIME	$ 10,396		$ 5,717	$ 4,679					
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
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					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
					$ -								
				SUBTOTAL FT:	$ 1,041,664	$ 378,268	$ 364,859	$ 298,537	$ -	$ -	$ -	$ -	$ -
				SUBTOTAL PT:	#VALUE!	$ -	$ 20,171	$ 16,505	$ -	$ -	$ -	$ -	$ -
				TOTAL	#VALUE!	$ 378,268	$ 385,030	$ 315,042	$ -	$ -	$ -	$ -	$ -
				PERCENT FT:	#VALUE!	100.00%	94.76%	94.76%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
				PERCENT PT:	#VALUE!	0.00%	5.24%	5.24%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

North Carolina Division of Aging and Adult Services` DAAS-732A

Service Cost Computation Worksheet

Provider: Cabarrus County
County: CABARRUS
Budget Period: July 2022 through June 2023

I. Projected Revenues	Grand Total		Service: Transportation (General) 250	Service: Transportation (Medical) 033	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A
A. Fed/State Funding From the Div. of Aging & Adult Svcs.	$ 234,666		$ 90,198	$ 144,468	$ -	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - Cash										
1) County Funds	$ 26,074		$ 10,022	$ 16,052						
2)	$ -									
3)	$ -									
Total Required Minimum Match - Cash	$ 26,074		$ 10,022	$ 16,052	$ -	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - In-Kind										
1)	$ -									
2)	$ -									
3)	$ -									
Total Required Minimum Match - In-Kind	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
B. Total Required Minimum Match (cash + in-kind)	$ 26,074		$ 10,022	$ 16,052	$ -	$ -	$ -	$ -	$ -	$ -
C. **Subtotal, Fed/State/Required Match Revenues**	$ 260,740		$ 100,220	$ 160,520	$ -	$ -	$ -	$ -	$ -	$ -
D. NSIP Cash Subsidy/Commodity Valuation	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
E. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -									
Local Cash, Non-Match										
1)	$ -									
2)	$ -									
3)	$ -									
4)	$ -									
F. **Subtotal, Local Cash, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Other Revenues, Non-Match										
1) State/Federal Grants	$ 951,261		$ 951,261							
2) Program Fees	$ 36,000		$ 36,000							
3) Medicaid Reinbursement	$ 1,000,000		$ 1,000,000							
G. **Subtotal, Other Revenues, Non-Match**	$ 1,987,261		$ 1,987,261	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Local In-Kind Resources (Includes Volunteer Resources)										
1)	$ -									
2)	$ -									
3)	$ -									
H. **Subtotal, Local In-kind Resources, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
I. **Client Cost Sharing**	$ -									
J. **Total Projected Revenues (Sum I.C,D,E,F,G,H, & I)**	$ 2,248,001		$ 2,087,481	$ 160,520	$ -	$ -	$ -	$ -	$ -	$ -

Division of Aging and Adult Services
Service Cost Computation Worksheet

II. Line Item Expenses	Grand Total	Admin. Cost	Service Transportation (General) 250	Service Transportation (Medical) 033	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A
Staff Salary From Labor Distribution Schedule										
1) Full-time Staff (do not include Title V workers)	$ 1,041,664	$ 378,268	$ 364,859	$ 298,537	$ -	$ -	$ -	$ -	$ -	$ -
2) Part-time staff (do not include Title V workers)	$ 36,676	$ -	$ 20,171	$ 16,505	$ -	$ -	$ -	$ -	$ -	$ -
A. **Subtotal, Staff Salary**	$ 1,078,340	**$ 378,268**	**$ 385,030**	**$ 315,042**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Fringe Benefits										
1) FICA @ 7.65 %	$ 82,493	$ 28,938	$ 29,455	$ 24,101	$ -	$ -	$ -	$ -	$ -	$ -
2) Health Insurance	$ 294,420	$ 106,575	$ 103,047	$ 84,798						
3) Retirement	$ 133,879	$ 48,599	$ 46,857	$ 38,423						
4) Unemployment Insurance	$ -									
5) Worker's Compensation	$ 31,424	$ 11,408	$ 10,998	$ 9,018						
6) Other	$ -									
B. **Subtotal, Fringe Benefits**	$ 542,216	$ 195,520	$ 190,357	$ 156,340	$ -	$ -	$ -	$ -	$ -	$ -
Local In-Kind Resources Non-Match										
1)	$ -									
2)	$ -									
3)	$ -									
C. **Subtotal, Local In-Kind Resources Non-Match**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
D. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -									
Travel										
1) Per Diem	$ -									
2) Mileage Reimbursement	$ -									
3) Other Travel Cost	$ -									
E. **Subtotal, Travel**	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
General Operating Expenses										
1) Printing/binding/Advertising	$ 2,500		$ 1,250	$ 1,250						
2) Uniforms	$ 5,466		$ 2,733	$ 2,733						
3) Fuel/Maintenance	$ 197,120		$ 98,560	$ 98,560						
4) Building Rental/ Gas and Power	$ 28,950		$ 14,475	$ 14,475						
5) Cell Phones	$ 6,048		$ 3,024	$ 3,024						
6) Cog/MIS fees	$ 175		$ 88	$ 88						
7) Purchased Services	$ 10,750		$ 5,375	$ 5,375						
8) Taxi Service	$ 383,024		$ 191,512	$ 191,512						
F. **Subtotal, General Operating Expenses**	$ 634,033	#VALUE!	$ 317,017	$ 317,017	$ -	$ -	$ -	$ -	$ -	$ -
G. **Subtotal, Other Administrative Cost Not Allocated in Lines II.A through E**	$ -									
H. **Total Proj. Expenses Prior to Admin. Distribution**	**$ 2,254,589**	**#VALUE!**	**$ 892,403**	**$ 788,398**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ (567,199)**		**$ (1,195,078)**	**$ 627,878**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
J. **Total Proj. Expenses After Admin. Distribution**	**$ 2,248,001**		**$ 2,087,481**	**$ 160,520**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**

III. Computation of Rates	Grand Total		Service Transportation (General) 250	Service Transportation (Medical) 033	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A	Service 0 #N/A
A. **Computation of Unit Cost Rate:**										
1. Total Expenses (equals line II.J)	$ 2,248,001		$ 2,087,481	$ 160,520	$ -	$ -	$ -	$ -	$ -	$ -
2. Total Projected Units			108,977	8,380						
3. Total Unit Cost Rate			$ 19.1552	$ 19.1551	$ -	$ -	$ -	$ -	$ -	$ -
B. **Computation of Reimbursement Rate:**										
1. Total Revenues (equals line I.J)	$ 2,248,001		$ 2,087,481	$ 160,520	$ -	$ -	$ -	$ -	$ -	$ -
2. Less: NSIP (equals line I.D)	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Title V (equals line I.E less II.D)	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Non Match In-Kind (equals line I.H less II.C)	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
3. Revenues Subject to Unit Reimbursement	$ 2,248,001		$ 2,087,481	$ 160,520	$ -	$ -	$ -	$ -	$ -	$ -
4. Total Projected Units (equals line III.A.2)			108,977	8,380	-	-	-	-	-	-
5. Total Reimbursement Rate			$ 19.1552	$ 19.1551	$ -	$ -	$ -	$ -	$ -	$ -
C. **Units Reimbursed Through HCCBG**			**5,232**	**8,380**	**-**	**-**	**-**	**-**	**-**	**-**
D. **Units Reimbursed Through Program Income***			**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
E. **Units Reimbursed Through Remaining Revenues**			**103,745**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
F. **Total Units Reimbursed/Total Projected Units**			**108,977**	**8,380**	**-**	**-**	**-**	**-**	**-**	**-**

* The Division of Aging ARMS deducts reported program income from reimbursement paid to providers. Line III.D indicates the number of units that will have to be produced in addition to those stated on line III.C in order to earn the net revenues stated on line I.C.

Certification:

I certify to the best of my knowledge and belief that the information included in the cost computation above is accurate and complies with all laws and regulations. I also understand that material deviations in reported cost information could limit funding, and also result in return of funds if the error or omission results in a higher than actual reported cost.

Authorized Signature	Title	Date

Information on this form (DAAS-732A) corresponds with information stated on the Provider Services Summary (DAAS-732) as follows:

	DAAS-732A	DAAS-732
Block Grant Funding	Line I.A	Col. A
Required Local Match-Cash & In-Kind	Line I.B	Col. B
Net Service Cost	Line I.C	Col. C
NSIP Subsidy	Line I.D	Col. D
Total Funding	L. I.C+I.D	Col. E
Projected HCCBG Reimbursed Units	Line III.C	Col. F
Total Reimbursement Rate	Line III.B.5	Col. G
Projected Total Service Units	Line III.F	Col. I

Home and Community Care Block Grant for Older Adults

Cabarrus County

1303 South Cannon Blvd

Kannapolis NC

County Funding Plan

Provider Services Summary

DAAS-732

County: CABARRUS

Budget Period: July 2022 through June 2023

Revision #: **Date:**

	Serv. Delivery (Check One)		A				B	C	D	E	F	G	H	I
			Block Grant Funding											
Services	Direct	Purchase	Access	In-Home	Other	Total	Required Local Match	Net Service Cost	NSIP Subsidy	Total Funding	Projected HCCBG Units	Projected Reimburse Rate	Projected HCCBG Clients	Projected Total Units
Transportation (General)	X		$ 90,198	$ -	$ -	$ 90,198	$ 10,022	$ 100,220	$ -	$ 100,220	5,232	$ 19.1552	5,567	108,977
Transportation (Medical)	X		$ 144,468	$ -	$ -	$ 144,468	$ 16,052	$ 160,520	$ -	$ 160,520	8,380	$ 19.1551	8,917	8,380
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
Total			$ 234,666	$ -	$ -	$ 234,666	$ 26,074	$ 260,740	$ -	$ 260,740	13,612		14,484	117,357

Certification of required minimum local match availability.
Required local match will be expended simultaneously with Block Grant Funding.

Authorized Signature, Title — Date
Community Service Provider

Signature, County Finance Officer — Date

Signature, Chairman, Board of Commissioners — Date

DAAS-733
(Rev. 2/19)

Home and Community Care Block Grant for Older Adults
Outreach Methodology

July 2022 through June 2023

Outreach Methodology to Address the Service Needs of Target Population

Community Service Provider: Cabarrus County

County: CABARRUS

While all older adults age 60 and over are eligible for services, sec. 305(a)(2)(E) of the Older Americans Act requires programs to target services to older individuals with the greatest economic and social need, (with particular attention to low-income older adults, including low-income minority older adults, older adults with limited English proficiency, and older adults residing in rural areas). The community service provider shall specify how these service needs will be met through the services identified on the Provider Services Summary (DAAS-732). This narrative shall address outreach and service delivery methodologies that will ensure that this target population is adequately served and conform with specific objectives established by the Area Agency on Aging, for providing services to low income minority individuals. Additional pages may be used as necessary.

Cabarrus County Transportations goal is to coordinate with the Adult and Aging department to provide meal site and medical transportation to the senior population within Cabarrus County. This joint effort is based on need through both referall and inquiries. Cabarrus County Transportation will also participate in several outreach programs to inform the senior population on the transportation services available to them. In addition, Cabarrus County Transportation drivers are trained in passanger sensitivity, CPR, Blood Borne Pathogens, First Aid and defensive driving. Our drivers are also trained on signs of elderly abuse and the process in which to report it.

July 2022 through June 2023

Home and Community Care Block Grant for Older Adults
Community Service Provider
Standard Assurances

Cabarrus County agrees to provide services through the Home and Community Care Block Grant, as specified on the Provider Services Summary (DAAS-732) in accordance with the following:

1. Services shall be provided in accordance with requirements set forth in:
   a) The County Funding Plan;

   b) The Division of Aging and Adult Services Home and Community Care Block Grant Procedures Manual for Community Service Providers; and

   c) The Division of Aging and Adult Services Standards at

   https://www.ncdhhs.gov/divisions/daas/monitoring

   Community service providers shall monitor any subcontracts with providers of Block Grant services and take appropriate measures to ensure that services are provided in accordance with the aforementioned documents.

2. Priority shall be given to providing services to those older persons with the greatest economic or social needs. The service needs of low-income minority elderly will be addressed in the manner specified on the Outreach Methodology to Address Service Needs of Target Population (DAAS-733).

3. The following service authorization activities will be carried out in conjunction with all services provided through the Block Grant:
   a) Eligibility determination;
   b) Client intake/registration;
   c) Client assessment/reassessments and quarterly visits, as appropriate;
   d) Determining the amount of services to be received by the client; and
   e) Reviewing consumer contributions policies with eligible clients.

4. All licenses, permits, bonds, and insurance necessary for carrying out Block Grant Services will be maintained by the community service provider and any subcontracted providers.

5. As specified in 45 CFR 75, Subpart D-Post Federal Award Requirements, Procurement Standards, community service providers shall have procedures for settling all contractual and administrative issues arising out of procurement of services through the Block Grant. Community service providers shall have procedures governing the evaluation of bids for services and procedures through which bidders and contracted providers may appeal or dispute a decision made by the community service provider.

6. Applicant/Client appeals shall be addressed as specified in Section 7 of the Division of Aging and Adult Services Home and Community Care Block Grant Manual for Community Service Providers.

7. Community service providers are responsible for providing or arranging for the provision of required local match, as specified on the Provider Services Summary, (DAAS-732). Local match shall be expended simultaneously with Block Grant funding.

8. Community service providers agree to comply with audit and fiscal reporting requirements as specified in the Agreement for the Provision of County-Based Aging Services (DAAS-735).

9. Compliance with Equal Employment Opportunity and Americans with Disabilities Act requirements, as specified in paragraph fourteen (14) of the Agreement for the Provision of County-Based Aging Services (DAAS-735) shall be maintained.

10. Providers of In-Home Aide, Home Health, Housing and Home Improvement, and Adult Day Care or Adult Day Health Care shall sign and return the attached assurance to the area agency on aging indicating that recipients of these services have been informed of their client rights, as required in Section 314 of the 2006 Amendments to the Older Americans Act (DAAS-734 Standard Assurances Regarding In-Home Client Rights).

11. Subcontracting – All HCCBG community service providers must assure that subcontractors (for-profit and non-profit entities only) meet the following requirements:

a. The subcontractor has not been suspended or debarred. (N.C.G.S. §143C-6-23, 09 NCAC 03M)
b. The subcontractor has not been barred from doing business at the federal level.
c. The subcontractor is able to produce a notarized "State Grant Certification of No Overdue Tax Debts."

d. All licenses, permits, bonds and insurance necessary for carrying out Home and Community Care Block Grant services will be maintained by both the community service provider and any subcontractors.

e. The subcontractor is registered as a charitable, tax-exempt (501c3) organization with the Internal Revenue Service (non-profit subcontractors only).

12. Confidentiality and Security. Per the requirements in 10A NCAC 05J and Section 6 of the Home and Community Care Block Grant Procedures Manual, client information in any format and whether recorded or not shall be kept confidential and not disclosed in a form that identifies the person without the informed consent of the person or legal representative. Community service providers, including subcontractors and vendors, must adhere to all applicable federal, state and departmental requirements for protecting the security and confidentiality of client information including but not limited to appropriately restricting access, establishing procedures to reduce the risk of accidental disclosures from data processing systems, and developing a process by which the Division of Adult Aging Services is notified of suspected or confirmed security incidents and data breaches.

13. Record Retention and Disposition. All community service providers are responsible for maintaining custody of records and documentation to support the allowable expenditure of funds, service provision, and the reimbursement of services. Service providers must adhere to the approved record retention and disposition schedule posted at https://www.ncdhhs.gov/about/administrative-offices/office-controller/records-retention by the NC Department of Health and Human Services Controller's Office, as well as the local government schedules posted by the NC Department of Natural and Culltural Resources at https://archives.ncdcr.gov/government/local

Service providers are not authorized to destroy records related to the provision of services under this Agreement except in compliance with the approved DHHS retention and disposition schedule, which allows for the proper destruction of records based on a schedule by funding source and fiscal year. The agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of record destruction. Confidential records will be destroyed in such a manner that the records cannot be practically read or reconstructed.

_____

(Authorized Signature) (Date)

Standard Assurance To Comply with Older Americans Act
Requirements Regarding Clients Rights
For
Agencies Providing In-Home Services through the
Home and Community Care Block Grant for Older Adults

As a provider of one or more of the services listed below, our agency agrees to notify all Home and Community Care Block Grant clients receiving any of the below listed services provided by this agency of their rights as a service recipient. Services in this assurance include:

- In-Home Aide
- Home Care (home health)
- Housing and Home Improvement
- Adult Day Care or Adult Day Health Care

Notification will include, at a minimum, an oral review of the information outlined below as well as providing each service recipient with a copy of the information in written form. In addition, providers of in-home services will establish a procedure to document that client rights information has been discussed with in-home services clients (e.g. copy of signed Client Bill of Rights statement).

Clients Rights information to be communicated to service recipients will include, at a minimum, the right to:

- be fully informed, in advance, about each in-home service to be provided and any change in service(s) that may affect the wellbeing of the participant;
- participate in planning and changing any in-home service provided unless the client is adjudicated incompetent;
- voice a grievance with respect to service that is or fails to be provided, without discrimination or reprisal as a result of voicing a grievance;
- confidentiality of records relating to the individual;
- have property treated with respect; and
- be fully informed both orally and in writing, in advance of receiving an in-home service, of the individual's rights and obligations.

Client Rights will be distributed to, and discussed with, each new client receiving one or more of the above listed services prior to the onset of service. For all existing clients, the above information will be provided no later than the next regularly scheduled service reassessment.

Agency Name: Cabarrus County

Name of Agency Administrator: _____

Signature: _____

(Please return this form to your Area Agency on Aging and retain a copy for your files.)

CLIENT/PATIENT RIGHTS

1. You have the right to be fully informed of all your rights and responsibilities as a client/p the program.

2. You have the right to appropriate and professional care relating to your needs.

3. You have the right to be fully informed in advance about the care to be provided by the

4. You have the right to be fully informed in advance of any changes in the care that you n receiving and to give informed consent to the provision of the amended care.

5. You have the right to participate in determining the care that you will receive and in alte nature of the care as your needs change.

6. You have the right to voice your grievances with respect to care that is provided and to there will be no reprisal for the grievance expressed.

7. You have the right to expect that the information you share with the agency will be resp held in strict confidence, to be shared only with your written consent and as it relates to obtaining of other needed community services.

8. You have the right to expect the preservation of your privacy and respect for your prope

9. You have the right to receive a timely response to your request for service.

10. You shall be admitted for service only if the agency has the ability to provide safe and professional care at the level of intensity needed.

11. You have the right to be informed of agency policies, changes, and costs for services.

12. If you are denied service solely on you inability to pay, you have the right to be referrec elsewhere.

13. You have the right to honest, accurate information regarding the industry, agency and program in particular.

14. You have the right to be fully informed about other services provided by this agency.

Internal Consistency Ch

Review of Local Match Comparison Input Sheet vs. 732A Cash and In-Kind Totals

Transportation (General)		OK
Transportation (Medical)		OK
	0	OK
	0	OK
	0	OK
	0	OK
	0	OK
	0	OK
	0	OK
	0	OK
	0	OK
	0	OK
	0	OK

732A1 Labor Distribution Schedule Comparison of Assignable Salary To Overall Salary Entered

Total Assignable Salary and Cumulative Salary total for Se #VALUE!

ecks

Difference

-
-
-
-
-
-
-
-
-
-
-
-
-
-

#VALUE!

State Fiscal Year:	SFY 2022-2023
Provider Name:	Cabarrus Meals on Wheels
Address Line 1:	342 Penny Lane
Address Line 2:	Concord, NC 28025
County:	Cabarrus
Area Agency on Aging:	Centralina Council of Governments

	Please Select Services to Be Delivered		Federal/State	Local Match	
	Home Delivered Meals	020	$ 121,942	$ 13,550	<--Local Match will need to be broken out by source (Cash/In-Kind) on 732A Svc Cost Computation Form
	Home Delivered Meals NSIP Reimbursement	021		$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	
REQUIRES INPUT TO POPULATE WORKBOOK-->				$ -	

Comparison of Fed/State Funding and Rates vs. Prior Year

Service		Prior Yr. Funding	Prior Year Rate	Current Yr Funding	Current Year Rate	Funding Diff.	Rate Diff.
Home Delivered Meals	020	$ 121,942	$ 6.0473	$ 121,942	7.3454	$ -	$ 1.2981
Home Delivered Meals NSIP Reimbursement	021				0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -
					0.0000	$ -	$ -

NC DIVISION OF AGING AND ADULT SERVICES COST OF SERVICES - LABOR DISTRIBUTION SCHEDULE DAAS-732A1

AGENCY NAME: Cabarrus Meals on Wheels

Fiscal Period: July 2022 through June 2023

State Fiscal Year: SFY 2022-2023

STAFF NAME	POSITION	TOTAL SALARY	FTE Equivalent	FULL TIME PART TIME	Assignable Salary	ADMIN. SALARY	SERVICE Home Delivered Meals	SERVICE Home Delivered Meals NSIP Reimbursement	SERVICE 0	SERVICE 0	SERVICE 0	SERVICE 0
Andrew Allen	Kitchen Manager	$ 48,000	1	FULL TIME	$ 48,000		$ 36,000	$ 12,000				
Savannah Cossey	Chef	$ 41,600	1	FULL TIME	$ 41,600		$ 31,200	$ 10,400				
Susan Kunder	Kitchen Asst	$ 29,000	1	FULL TIME	$ 29,000		$ 21,750	$ 7,250				
Nicole Gesty	Asst	$ 21,000	1	FULL TIME	$ 21,000		$ 15,750	$ 5,250				
Kylie Christian	Dishwasher	$ 20,000	1	FULL TIME	$ 20,000		$ 15,000	$ 5,000				
Ericka Dalton	Client Case Manager	$ 50,000	1	FULL TIME	$ 50,000		$ 25,000	$ 25,000				
Kimberly Strong	Executive Director	$ 95,000	0.5	PART TIME	$ 47,500	$ 47,500						
					$ -							
					$ -							
					$ -

North Carolina Division of Aging and Adult Services` DAAS-732A

Service Cost Computation Worksheet

Provider: Cabarrus Meals on Wheels
County: Cabarrus
Budget Period: July 2022 through June 2023

I. Projected Revenues	Grand Total		Service: Home Delivered Meals 020	Service: Home Delivered Meals NSIP Reimbursement 021	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A
A. Fed/State Funding From the Div. of Aging & Adult Svcs.	$ 121,942		$ 121,942	$ -	$ -	$ -	$ -
Required Minimum Match - Cash							
1) FUNDRAISERS GRANTS	$ 13,549		$ 13,549				
2)	$ -						
3)	$ -						
Total Required Minimum Match - Cash	$ 13,549		$ 13,549	$ -	$ -	$ -	$ -
Required Minimum Match - In-Kind							
1)	$ -						
2)	$ -						
3)	$ -						
Total Required Minimum Match - In-Kind	$ -		$ -	$ -	$ -	$ -	$ -
B. Total Required Minimum Match (cash + in-kind)	$ 13,549		$ 13,549	$ -	$ -	$ -	$ -
C. **Subtotal, Fed/State/Required Match Revenues**	$ 135,491		$ 135,491	$ -	$ -	$ -	$ -
D. NSIP Cash Subsidy/Commodity Valuation	$ 88,000		$ 88,000	$ -	$ -	$ -	$ -
E. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -						
Local Cash, Non-Match							
1)	$ -						
2)	$ -						
3)	$ -						
4)	$ -						
F. **Subtotal, Local Cash, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -
Other Revenues, Non-Match							
1) grants	$ 450,000		$ 270,000	$ 180,000			
2) private pay	$ 100,000		$ 100,000				
3) other operating	$ 320,000		$ 300,000	$ 20,000			
G. **Subtotal, Other Revenues, Non-Match**	$ 870,000		$ 670,000	$ 200,000	$ -	$ -	$ -
Local In-Kind Resources (Includes Volunteer Resources)							
1)	$ -						
2)	$ -						
3)	$ -						
H. **Subtotal, Local In-kind Resources, Non-Match**	$ -		$ -	$ -	$ -	$ -	$ -
I. **Client Cost Sharing**	$ 2,500		$ 2,500				
J. **Total Projected Revenues (Sum I.C,D,E,F,G,H, & I)**	$ 1,095,991		$ 895,991	$ 200,000	$ -	$ -	$ -

Division of Aging and Adult Services
Service Cost Computation Worksheet

II. Line Item Expenses	Grand Total	Admin. Cost	Service: Home Delivered Meals 020	Service: Home Delivered Meals NSIP Reimbursement 021	Service: 0 #N/A	Service: 0 #N/A	Service: 0 #N/A
Staff Salary From Labor Distribution Schedule							
1) Full-time Staff (do not include Title V workers)	$ 209,600	$ -	$ 144,700	$ 64,900	$ -	$ -	$ -
2) Part-time staff (do not include Title V workers)	$ -	$ 47,500	$ -	$ -	$ -	$ -	$ -
A. **Subtotal, Staff Salary**	$ 257,100	**$ 47,500**	**$ 144,700**	**$ 64,900**	**$ -**	**$ -**	**$ -**

Fringe Benefits							
1) FICA @ 7.65 %	$ 19,668	$ 3,634	$ 11,070	$ 4,965	$ -	$ -	$ -
2) Health Insurance	$ -						
3) Retirement	$ 8,000		$ 8,000				
4) Unemployment Insurance	$ 10,000		$ 10,000				
5) Worker's Compensation	$ -						
6) Other	$ -						
B. **Subtotal, Fringe Benefits**	$ 37,668	$ 3,634	$ 29,070	$ 4,965	$ -	$ -	$ -
Local In-Kind Resources Non-Match							
1)	$ -						
2)	$ -						
3)	$ -						
C. **Subtotal, Local In-Kind Resources Non-Match**	$ -	$ -	$ -	$ -	$ -	$ -	$ -
D. **OAA Title V Worker Wages, Fringe Benefits and Costs**	$ -						
Travel							
1) Per Diem	$ -						
2) Mileage Reimbursement	$ -						
3) Other Travel Cost	$ 5,000		$ 5,000				
E. **Subtotal, Travel**	$ 5,000	$ -	$ 5,000	$ -	$ -	$ -	$ -
General Operating Expenses							
1) mortgage	$ 30,000	$ 30,000					
2) utilities phone	$ 36,000	$ 36,000					
3) food/trays	$ 400,000	$ 400,000					
4) audit/legal	$ 17,000	$ 17,000					
5) insurance	$ 20,000	$ 20,000					
6)	$ -						
7) other payroll	$ 200,000	$ 200,000					
8) other expenses	$ 202,956	$ 202,956					
F. **Subtotal, General Operating Expenses**	$ 905,956	$ 905,956	$ -	$ -	$ -	$ -	$ -
G. **Subtotal, Other Administrative Cost Not Allocated in Lines II.A through E**	$ -						
H. **Total Proj. Expenses Prior to Admin. Distribution**	**$ 1,205,724**	**$ 957,090**	**$ 178,770**	**$ 69,865**	**$ -**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ (847,357)**		**$ (717,221)**	**$ (130,135)**	**$ -**	**$ -**	**$ -**
J. **Total Proj. Expenses After Admin. Distribution**	**$ 1,095,991**		**$ 895,991**	**$ 200,000**	**$ -**	**$ -**	**$ -**

III. Computation of Rates	**Grand Total**		**Service** Home Delivered Meals 020	**Service** e Delivered Meals NSIP Reimburse 021	**Service** 0 #N/A	**Service** 0 #N/A	**Service** 0 #N/A
A. **Computation of Unit Cost Rate:**							
1. Total Expenses (equals line II.J)	$ 1,095,991		$ 895,991	$ 200,000	$ -	$ -	$ -
2. Total Projected Units			110,000				
3. Total Unit Cost Rate			$ 8.1454	$ -	$ -	$ -	$ -
B. **Computation of Reimbursement Rate:**							
1. Total Revenues (equals line I.J)	$ 1,095,991		$ 895,991	$ 200,000	$ -	$ -	$ -
2. Less: NSIP (equals line I.D)	$ 88,000		$ 88,000	$ -	$ -	$ -	$ -
Title V (equals line I.E less II.D)	$ -		$ -	$ -	$ -	$ -	$ -
Non Match In-Kind (equals line I.H less II.C)	$ -		$ -	$ -	$ -	$ -	$ -
3. Revenues Subject to Unit Reimbursement	$ 1,007,991		$ 807,991	$ 200,000	$ -	$ -	$ -
4. Total Projected Units (equals line III.A.2)			110,000	-	-	-	-
5. Total Reimbursement Rate			$ 7.3454	$ -	$ -	$ -	$ -
C. **Units Reimbursed Through HCCBG**			**18,446**	**-**	**-**	**-**	**-**
D. **Units Reimbursed Through Program Income***			**340**	**-**	**-**	**-**	**-**
E. **Units Reimbursed Through Remaining Revenues**			**91,214**	**-**	**-**	**-**	**-**
F. **Total Units Reimbursed/Total Projected Units**			**110,000**	**-**	**-**	**-**	**-**

* The Division of Aging ARMS deducts reported program income from reimbursement paid to providers. Line III.D indicates the number of units that will have to be produced in addition to those stated on line III.C in order to earn the net revenues stated on line I.C.

Certification:

I certify to the best of my knowledge and belief that the information included in the cost computation above is accurate and complies with all laws and regulations. I also understand that material deviations in reported cost information could limit funding, and also result in return of funds if the error or omission results in a higher than actual reported cost.

Authorized Signature	Title	Date

Information on this form (DAAS-732A) corresponds with information stated on the Provider Services Summary (DAAS-732) as follows:

	DAAS-732A	DAAS-732
Block Grant Funding	Line I.A	Col. A
Required Local Match-Cash & In-Kind	Line I.B	Col. B
Net Service Cost	Line I.C	Col. C
NSIP Subsidy	Line I.D	Col. D
Total Funding	L. I.C+I.D	Col. E
Projected HCCBG Reimbursed Units	Line III.C	Col. F
Total Reimbursement Rate	Line III.B.5	Col. G
Projected Total Service Units	Line III.F	Col. I

Home and Community Care Block Grant for Older Adults

Cabarrus Meals on Wheels

342 Penny Lane

Concord, NC 28025

County Funding Plan

Provider Services Summary

DAAS-732

County: Cabarrus

Budget Period: July 2022 through June 2023

Revision #: **Date:**

Services	Serv. Delivery (Check One) Direct	Purchase	A Block Grant Funding: Access	In-Home	Other	Total	B Required Local Match	C Net Service Cost	D NSIP Subsidy	E Total Funding	F Projected HCCBG Units	G Projected Reimburse Rate	H Projected HCCBG Clients	I Projected Total Units
Home Delivered Meals	X		$ -	$ 121,942	$ -	$ 121,942	$ 13,549	$ 135,491	$ 88,000	$ 223,491	18,446	$ 7.3454	300	110,000
Home Delivered Meals NSIP Reimbursement	X		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -	100	-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
Total			$ -	$ 121,942	$ -	$ 121,942	$ 13,549	$ 135,491	$ 88,000	$ 223,491	18,446		400	110,000

Certification of required minimum local match availability. Required local match will be expended simultaneously with Block Grant Funding.

Kimberly Stone 04/21/2022

Authorized Signature, Title — Date

Community Service Provider

Signature, County Finance Officer — Date

Signature, Chairman, Board of Commissioners — Date

DAAS-733
(Rev. 2/19)

Home and Community Care Block Grant for Older Adults
Outreach Methodology

July 2022 through June 2023

Outreach Methodology to Address the Service Needs of Target Population

Community Service Provider: Cabarrus Meals on Wheels

County: Cabarrus

While all older adults age 60 and over are eligible for services, sec. 305(a)(2)(E) of the Older Americans Act requires programs to target services to older individuals with the greatest economic and social need, (with particular attention to low-income older adults, including low-income minority older adults, older adults with limited English proficiency, and older adults residing in rural areas). The community service provider shall specify how these service needs will be met through the services identified on the Provider Services Summary (DAAS-732). This narrative shall address outreach and service delivery methodologies that will ensure that this target population is adequately served and conform with specific objectives established by the Area Agency on Aging, for providing services to low income minority individuals. Additional pages may be used as necessary.

Cabarrus Meals on Wheels serves all who need a meal regardless of income. Meals are delivered throughout Cabarrus county each Monday - Friday by volunteers. We do outreach at various events throughout the year to reach individuals who may be in need of service. We partner with Atrium Health, doctor's offices, churches, and other agencies to receive referrals for our service. We partner with our local Veteran's Administration to serve our local Veterans in need of a nutritious meal.

July 2022 through June 2023

Home and Community Care Block Grant for Older Adults
Community Service Provider
Standard Assurances

Cabarrus Meals on Wheels agrees to provide services through the Home and Community Care Block Grant, as specified on the Provider Services Summary (DAAS-732) in accordance with the following:

1. Services shall be provided in accordance with requirements set forth in:
   a) The County Funding Plan;

   b) The Division of Aging and Adult Services Home and Community Care Block Grant Procedures Manual for Community Service Providers; and

   c) The Division of Aging and Adult Services Standards at

   https://www.ncdhhs.gov/divisions/daas/monitoring

   Community service providers shall monitor any subcontracts with providers of Block Grant services and take appropriate measures to ensure that services are provided in accordance with the aforementioned documents.

2. Priority shall be given to providing services to those older persons with the greatest economic or social needs. The service needs of low-income minority elderly will be addressed in the manner specified on the Outreach Methodology to Address Service Needs of Target Population (DAAS-733).

3. The following service authorization activities will be carried out in conjunction with all services provided through the Block Grant:
   a) Eligibility determination;
   b) Client intake/registration;
   c) Client assessment/reassessments and quarterly visits, as appropriate;
   d) Determining the amount of services to be received by the client; and
   e) Reviewing consumer contributions policies with eligible clients.

4. All licenses, permits, bonds, and insurance necessary for carrying out Block Grant Services will be maintained by the community service provider and any subcontracted providers.

5. As specified in 45 CFR 75, Subpart D-Post Federal Award Requirements, Procurement Standards, community service providers shall have procedures for settling all contractual and administrative issues arising out of procurement of services through the Block Grant. Community service providers shall have procedures governing the evaluation of bids for services and procedures through which bidders and contracted providers may appeal or dispute a decision made by the community service provider.

6. Applicant/Client appeals shall be addressed as specified in Section 7 of the Division of Aging and Adult Services Home and Community Care Block Grant Manual for Community Service Providers.

7. Community service providers are responsible for providing or arranging for the provision of required local match, as specified on the Provider Services Summary, (DAAS-732). Local match shall be expended simultaneously with Block Grant funding.

8. Community service providers agree to comply with audit and fiscal reporting requirements as specified in the Agreement for the Provision of County-Based Aging Services (DAAS-735).

9. Compliance with Equal Employment Opportunity and Americans with Disabilities Act requirements, as specified in paragraph fourteen (14) of the Agreement for the Provision of County-Based Aging Services (DAAS-735) shall be maintained.

11. Subcontracting – All HCCBG community service providers must assure that subcontractors (for-profit and non-profit entities only) meet the following requirements:

a. The subcontractor has not been suspended or debarred. (N.C.G.S. §143C-6-23, 09 NCAC 03M)

b. The subcontractor has not been barred from doing business at the federal level.

c. The subcontractor is able to produce a notarized "State Grant Certification of No Overdue Tax Debts."

d. All licenses, permits, bonds and insurance necessary for carrying out Home and Community Care Block Grant services will be maintained by both the community service provider and any subcontractors.

e. The subcontractor is registered as a charitable, tax-exempt (501c3) organization with the Internal Revenue Service (non-profit subcontractors only).

12. Confidentiality and Security. Per the requirements in 10A NCAC 05J and Section 6 of the Home and Community Care Block Grant Procedures Manual, client information in any format and whether recorded or not shall be kept confidential and not disclosed in a form that identifies the person without the informed consent of the person or legal representative. Community service providers, including subcontractors and vendors, must adhere to all applicable federal, state and departmental requirements for protecting the security and confidentiality of client information including but not limited to appropriately restricting access, establishing procedures to reduce the risk of accidental disclosures from data processing systems, and developing a process by which the Division of Adult Aging Services is notified of suspected or confirmed security incidents and data breaches.

13. Record Retention and Disposition. All community service providers are responsible for maintaining custody of records and documentation to support the allowable expenditure of funds, service provision, and the reimbursement of services. Service providers must adhere to the approved record retention and disposition schedule posted at https://www.ncdhhs.gov/about/administrative-offices/office-controller/records-retention by the NC Department of Health and Human Services Controller's Office, as well as the local government schedules posted by the NC Department of Natural and Culltural Resources at https://archives.ncdcr.gov/government/local

Service providers are not authorized to destroy records related to the provision of services under this Agreement except in compliance with the approved DHHS retention and disposition schedule, which allows for the proper destruction of records based on a schedule by funding source and fiscal year. The agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of record destruction. Confidential records will be destroyed in such a manner that the records cannot be practically read or reconstructed.

Kimberly Story 04/21/2022

(Authorized Signature) (Date)

CLIENT/PATIENT RIGHTS

1. You have the right to be fully informed of all your rights and responsibilities as a clien the program.

2. You have the right to appropriate and professional care relating to your needs.

3. You have the right to be fully informed in advance about the care to be provided by th

4. You have the right to be fully informed in advance of any changes in the care that you receiving and to give informed consent to the provision of the amended care.

5. You have the right to participate in determining the care that you will receive and in al nature of the care as your needs change.

6. You have the right to voice your grievances with respect to care that is provided and t there will be no reprisal for the grievance expressed.

7. You have the right to expect that the information you share with the agency will be re held in strict confidence, to be shared only with your written consent and as it relates obtaining of other needed community services.

8. You have the right to expect the preservation of your privacy and respect for your pro

9. You have the right to receive a timely response to your request for service.

10. You shall be admitted for service only if the agency has the ability to provide safe an professional care at the level of intensity needed.

11. You have the right to be informed of agency policies, changes, and costs for service

12. If you are denied service solely on you inability to pay, you have the right to be refer elsewhere.

13. You have the right to honest, accurate information regarding the industry, agency an program in particular.

14. You have the right to be fully informed about other services provided by this agency.

Internal Consistency Checks

Review of Local Match Comparison Input Sheet vs. 732A Cash and In-Kind Totals

			Difference
Home Delivered Meals		OK	-
Home Delivered Meals NSIP Reimbursement		OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-
	0	OK	-

732A1 Labor Distribution Schedule Comparison of Assignable Salary To Overall Salary Entered

Total Assignable Salary and Cumulative Salary total for Se	0	$	-

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Human Resources - Personnel Ordinance Updates

BRIEF SUMMARY:
Effective July 1, 2022 Human Resources would like to freeze evaluation dates as currently established (hire date or position date) and not make changes for future employee job changes (promotions and demotions) to ensure a consistent one-time per 12 months performance evaluation process for all employees. This also ties to the potential merit date and will require Personnel Ordinance changes. In addition, there is a slight change to the grievance process.

REQUESTED ACTION:
Motion to approve changes to the Personnel Ordinance as requested.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Lundee Covington Human Resources 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.

ATTACHMENTS:

- Personnel Ordinance Changes

Section involved in freezing employee evaluation dates:

Drop

n) Effective Date. Normally the date of an employee's last significant personnel action related to their position - such as hire or promotion date. Determines when an employee is eligible for a performance evaluation and any related salary increase.

Add

Evaluation Date – The date an employee is eligible for a performance evaluation and merit pay increase if applicable.

Section 3. Use of Salary Ranges

(c) Merit Increase Administration. Each year, an employee shall receive a performance evaluation and be considered for a merit increase ~~on the anniversary of his or her date in that position~~ on his or her evaluation date. Merit increases are determined by the score received on the evaluation and any program adjustments. An employee must receive a 2.01 rating or greater on the 5.00 point scale to qualify. If an employee qualifies, the department head recommends a merit increase according to the chart below. After administrative review by the Human Resources Director, the increase is added to the employee's base salary.

Section 5. Salary of a Trainee

An applicant hired or an employee promoted to a position who does not meet all the established requirements of the position may be appointed at a rate in the pay plan below the minimum rate established for that position. The established trainee rate for any given position shall be the minimum rate for the salary grade below the one of that position. An employee at the trainee level shall be evaluated at least every six months. The department head may certify that the trainee is qualified to assume the full responsibilities of the position at the conclusion of said review. At this point the employee will be paid at the entry salary for the position. The employee then becomes eligible for merit increases on ~~subsequent anniversaries of the date he or she was released from trainee status.~~ his or her evaluation date.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 3535 Katrina Avenue, Further Identified as PIN 5641-70-7417

BRIEF SUMMARY:
The City of Concord received a request for water service in Area A of the Central Area Land Use Plan Interlocal Agreement (CALUP ILA). The request is from Humberto Perez for property located at 3535 Katrina Avenue, further identified as PIN 5641-70-7417. The property will be developed with one single-family home. Pursuant to the CALUP ILA, all requests for service in Area A must be jointly approved by the Cabarrus County Board of Commissioners and Concord City Council.

REQUESTED ACTION:
Motion to approve the request for the City of Concord to provide water service at 3535 Katrina Avenue, further identified as PIN 5641-70-7417 and to authorize County Manager to execute Agreement subject to review and approval by the County Attorney.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Susie A. Morris, Planning and Zoning Manager
Richard Koch, County Attorney

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.

ATTACHMENTS:

- ILA Amendment Document - PEREZ 3535 KATRINA
- Prelimnary Application for Service 3535 Katrina
- Map

STATE OF NORTH CAROLINA	AD HOC MODIFICATION OF CITY OF THE CONCORD-CABARRUS COUNTY INTERLOCAL AGREEMENT REGARDING
COUNTY OF CABARRUS	THE CENTRAL AREA PLAN (PEREZ-3535 KATRINA AVENUE/5641-70-7417)

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 Humberto Perez, 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 water utility services under its normal and customary terms and conditions to the property located at 3535 Katrina Avenue (PIN 5641-70-7417)

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: _____ Date: _____
Lloyd Payne, City Manager

CABARRUS COUNTY

By: _____ Date: _____
Mike Downs, County Manager

City of Concord, North Carolina

Preliminary Application – Extension of Concord Utilities outside Concord City Limits

(Please type or print in black ink)

1. Name of development: Impala 2 story house
2. Name and address of owner(s)/developer(s): Humberto Perez
   3970 elkwood ct concord nc 28025
3. Owner(s)/developer(s) telephone: 7042804255 Fax: _____
4. Name and address of surveyor/engineer: Guillermo Anzola
   11124 coachman cir Charlotte nc 28277
5. Surveyor/engineer's telephone: 7047714874 Fax: _____
6. Name, telephone and fax number, and address of agent (if any): _____
7. Name and address of person to whom comments should be sent: Humberto Perez
   3970 elkwood ct concord nc 28025
8. Telephone number of person to whom comments should be sent: 7042804255
   Fax: _____
9. Location of property: 3535 Katrina ave concord nc 28025
10. Cabarrus County P.I.N.#: 5641707417
11. Current zoning classification: _____
12. Total acres: 0.463 Total lots proposed: 1
13. Brief Description of development: New 2 story house approximately 3,600 sqft
14. Proposed Construction Schedule Starting date march 10 2022
15. Type of Service requested City water (water tap)

03/01/2022
Date


Signature of Owner/Agent

Humberto Perez
Name (printed)

NOTE: *By affixing his or her signature hereto, the owner/developer acknowledges understanding of and agreement to comply with all provisions of the Concord City Code section 62.*

Staff Use Only:

Received by: _____ Date: _____

Proposed CALUP ILA Amendment
3535 Katrina Avenue
PIN 5641-70-7417



CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Planning and Development - Budget Amendment to Allocate Newly Awarded Duke Helping Home Fund Revenues and Expenses

BRIEF SUMMARY:
Duke Energy has awarded an additional $20,000 for the Helping Home Fund. The program does not require a match and is a companion program to Weatherization Program. These funds pay for new HVAC systems, appliances, water heaters, and various other health and safety repairs in the homes of qualified applicants. This program has allowed the county to Weatherize some homes that would have otherwise been deferred and provided needed appliances for low income, elderly and disabled clients. To date, staff has expended almost all of the previous grant serving 11 households. The repairs include 6 HVAC replacements, 1 HVAC repair, 3 water heaters, 2 washers, 2 dryers and 2 stoves.

REQUESTED ACTION:
Motion to adopt the budget amendment.

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.

ATTACHMENTS:

- Budget Amendment

Budget Revision/Amendment Request

Date: 20-Jun-22 **Amount:** 20,000.00

Dept. Head: Kelly Sifford **Department:** Community Development

☐ **Internal Transfer Within Department** ☐ **Transfer Between Departments/Funds** ☑ **Supplemental Request**

Allocate additional funding received from Duke Energy Carolinas.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	6	3250-6376	Duke Energy Carolinas	32,000.00	20,000.00		52,000.00
001	9	3250-9493-DECHS	DEC Health & Safety	8,000.00	10,000.00		18,000.00
001	9	3250-9493-DECHV	DEC HVAC	24,000.00	10,000.00		34,000.00
						Total	104,000.00

Budget Officer

☐ Approved

☐ Denied

_____

Signature

_____

Date

County Manager

☐ Approved

☐ Denied

_____

Signature

_____

Date

Board of Commissioners

☐ Approved

☐ Denied

_____

Signature

_____

Date

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Tax Administration - Refund and Release Reports - May 2022

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 May 2022 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.

ATTACHMENTS:

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

Summary of Releases and Refunds for the Month Of May 2022

RELEASES FOR THE MONTH OF: MAY 2022 **$231,450.77**

BREAKDOWN OF RELEASES:

COUNTY	$140,288.88
CITY OF CONCORD	$90,793.32
CITY OF KANNAPOLIS	$358.59
CITY OF LOCUST	$0.00
CITY OF STANFIELD	$0.00
CITY OF CONCORD DOWNTOWN	$0.00
TOWN OF HARRISBURG	$0.00
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	$9.98
JACKSON PARK F/D	$0.00
MIDLAND F/D	$0.00
MT MITCHELL F/D	$0.00
MT PLEASANT F/D	$0.00
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: MAY 2022 **$0.00**

BREAKDOWN OF REFUNDS:

COUNTY	$0.00
CITY OF CONCORD	$0.00
CITY OF KANNAPOLIS	$0.00
CITY OF LOCUST	$0.00
CITY OF STANFIELD	$0.00
CITY OF CONCORD DOWNTOWN	$0.00
TOWN OF HARRISBURG	$0.00
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	$0.00
MIDLAND F/D	$0.00
MT. MITCHELL F/D	$0.00
MT. PLEASANT F/D	$0.00
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

MAY 2022 RELEASE REPORT

Name	Bill#	Reason	District	Amount
A & A LOGO GEAR	2021-10435	INFORMAL VALUE APPEAL. NCGS 105-381.	C PEN FEE	59.57
A & A LOGO GEAR	2021-10435	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02PEN FEE	38.64
A & A LOGO GEAR	2021-10435	INFORMAL VALUE APPEAL. NCGS 105-381.	C ADVLTAX	595.70
A & A LOGO GEAR	2021-10435	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02ADVLTAX	386.40
A & A LOGO GEAR	2020-10424	INFORMAL VALUE APPEAL. NCGS 105-381.	C PEN FEE	59.57
A & A LOGO GEAR	2020-10424	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02PEN FEE	38.64
A & A LOGO GEAR	2020-10424	INFORMAL VALUE APPEAL. NCGS 105-381.	C ADVLTAX	595.70
A & A LOGO GEAR	2020-10424	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02ADVLTAX	386.40
A & A LOGO GEAR	2020-217	INFORMAL VALUE APPEAL. NCGS 105-381.	C PEN FEE	59.57
A & A LOGO GEAR	2020-217	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02PEN FEE	38.64
A & A LOGO GEAR	2020-217	INFORMAL VALUE APPEAL. NCGS 105-381.	C ADVLTAX	595.70
A & A LOGO GEAR	2020-217	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02ADVLTAX	386.40
A & A LOGO GEAR	2020-216	INFORMAL VALUE APPEAL. NCGS 105-381.	C PEN FEE	115.92
A & A LOGO GEAR	2020-216	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02PEN FEE	77.28
A & A LOGO GEAR	2020-216	INFORMAL VALUE APPEAL. NCGS 105-381.	C ADVLTAX	579.60
A & A LOGO GEAR	2020-216	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02ADVLTAX	386.40
A & A LOGO GEAR	2020-215	INFORMAL VALUE APPEAL. NCGS 105-381.	C PEN FEE	169.05
A & A LOGO GEAR	2020-215	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02PEN FEE	115.92
A & A LOGO GEAR	2020-215	INFORMAL VALUE APPEAL. NCGS 105-381.	C ADVLTAX	563.50
A & A LOGO GEAR	2020-215	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02ADVLTAX	386.40
A & A LOGO GEAR	2020-214	INFORMAL VALUE APPEAL. NCGS 105-381.	C PEN FEE	225.40
A & A LOGO GEAR	2020-214	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02PEN FEE	154.56
A & A LOGO GEAR	2020-214	INFORMAL VALUE APPEAL. NCGS 105-381.	C ADVLTAX	563.50
A & A LOGO GEAR	2020-214	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02ADVLTAX	386.40
A & A LOGO GEAR	2020-213	INFORMAL VALUE APPEAL. NCGS 105-381.	C PEN FEE	281.75
A & A LOGO GEAR	2020-213	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02PEN FEE	193.20
A & A LOGO GEAR	2020-213	INFORMAL VALUE APPEAL. NCGS 105-381.	C ADVLTAX	563.50
A & A LOGO GEAR	2020-213	INFORMAL VALUE APPEAL. NCGS 105-381.	CI02ADVLTAX	386.40
ABEE RYAN DAVID	2021-500314	TAX CODE/JURISDICTION CORRECTION;	C ADVLTAX	49.21
ABEE RYAN DAVID	2021-500314	TAX CODE/JURISDICTION CORRECTION;	FR07ADVLTAX	9.98
BARNES & NOBLE COLLEGE	2021-16387	USINESS CLOSED. NCGS 105-381	C ADVLTAX	234.16
BARNES & NOBLE COLLEGE	2021-16387	USINESS CLOSED. NCGS 105-381	CI04ADVLTAX	199.35
BRISCOE CAROLYN	2022-501582	TAX CODE JURISDICTION 105-381	C ADVLTAX	159.14
BRISCOE CAROLYN	2022-501582	TAX CODE JURISDICTION 105-381	CI02ADVLTAX	103.22
CARVANA NC2003	2022-221	OTHER. NCGS 105-381. THIS 2021	C PEN FEE	22185.55
CARVANA NC2003	2022-221	OTHER. NCGS 105-381. THIS 2021	CI02PEN FEE	14390.63
CARVANA NC2003	2022-221	OTHER. NCGS 105-381. THIS 2021	C ADVLTAX	110927.76
CARVANA NC2003	2022-221	OTHER. NCGS 105-381. THIS 2021	CI02ADVLTAX	71953.14
FURR MICHAEL NELSON	2022-503046	TAX CODE/JURISDICTION CORRECTION;	C ADVLTAX	187.04
FURR MICHAEL NELSON	2022-503046	TAX CODE/JURISDICTION CORRECTION;	CI04ADVLTAX	159.24
LOWMAN BRITTANY MICHELLE	2021-501951	TAX CODE/JURISDICTION CORRECTION;	C ADVLTAX	12.39
LOWMAN BRITTANY MICHELLE	2021-501951	TAX CODE/JURISDICTION CORRECTION;	CI02ADVLTAX	8.04
LOWMAN BRITTANY MICHELLE	2021-501951		C ADVLTAX	-12.39
LOWMAN BRITTANY MICHELLE	2021-501951		CI02ADVLTAX	-8.04
LOWMAN BRITTANY MICHELLE	2021-501951	TAX CODE/JURISDICTION CORRECTION;	C ADVLTAX	12.39
LOWMAN BRITTANY MICHELLE	2021-501951	TAX CODE/JURISDICTION CORRECTION;	CI02ADVLTAX	8.04
MUDDULURU JEEVAN KUMAR	2022-503324	TAX JRISDICTION 105381	C ADVLTAX	196.47
MUDDULURU JEEVAN KUMAR	2022-503324	TAX JRISDICTION 105381	CI02ADVLTAX	127.44
PRICE KYLE SHAMAR	2021-502207	TAX CODE/JURISDICTION CORRECTION;	C ADVLTAX	512.52
PRICE KYLE SHAMAR	2021-502207	TAX CODE/JURISDICTION CORRECTION;	CI02ADVLTAX	332.45
RAUSO THOMAS	2022-503460	TAX CODE JURISDICTION 105-381	C ADVLTAX	78.72
RAUSO THOMAS	2022-503460	TAX CODE JURISDICTION 105-381	CI02ADVLTAX	51.06
SHAY LAURA RACHEL	2021-501204	105381, TAX JURISDICTION	C ADVLTAX	717.89
SHAY LAURA RACHEL	2021-501204	105381, TAX JURISDICTION	CI02ADVLTAX	465.66

North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 6/3/2022 8:07:19 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
ADDALA, SUNEEL	ADDALA, SUNEEL		3042 HALEY CIR		DAVIDSON, NC 28036	Proration	0061304203	DHX1605	PENDING	247522362	Refund Generated due to proration on Bill #0061304203-2020-2020-0000-00	Vehicle Sold	05/11/2022	C ADVL	Tax	($62.97)	$0.00	($62.97)
														CI02ADVL	Tax	($40.85)	$0.00	($40.85)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$103.82
AYERS, ALLYSON LAYNE	AYERS, ALLYSON LAYNE		8020 UNTZ RD		CONCORD, NC 28027	Proration	0066402984	TKH6139	PENDING	165420380	Refund Generated due to proration on Bill #0066402984-2021-	Vehicle Sold	05/19/2022	C ADVL	Tax	($51.87)	$0.00	($51.87)
														FR11ADVL	Tax	($4.77)	$0.00	($4.77)
																	Refund	$56.64
BADGER, JIMMY L	BADGER, JIMMY L	BADGER, MARTHA ANN	404 WYNDHAM PL NE		CONCORD, NC 28025	Proration	0066491018	KAF8877	PENDING	248718864	Refund Generated due to proration on Bill #0066491018-2021-2021-0000-00	Vehicle Sold	05/26/2022	C ADVL	Tax	($27.82)	$0.00	($27.82)
														CI02ADVL	Tax	($18.05)	$0.00	($18.05)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$75.87
BALLARD, ERNEST JACK	BALLARD, ERNEST JACK	BALLARD, JEWELL SHINN	2940 OLD SALISBURY RD		CONCORD, NC 28025	Proration	0036231452	DMT6960	PENDING	165736712	Refund Generated due to proration on Bill #0036231452-2021-	Vehicle Sold	05/25/2022	C ADVL	Tax	($66.82)	$0.00	($66.82)
														FR03ADVL	Tax	($7.22)	$0.00	($7.22)
																	Refund	$74.04
BASS, ADAM BRYANT	BASS, ADAM BRYANT		3513 KENDALE AVE NW		CONCORD, NC 28027	Proration	0063063353	HJZ3067	PENDING	247104927	Refund Generated due to proration on Bill #0063063353-2021-2021-0000-00	Vehicle Totalled	05/05/2022	C ADVL	Tax	($61.21)	$0.00	($61.21)
														CI02ADVL	Tax	($39.70)	$0.00	($39.70)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$100.91
BELL, DIXIE LEE	BELL, DIXIE LEE	BELL, STEPHEN GEORGE	1257 MIDLAKE RD		KANNAPOLIS, NC 28083	Proration	0051678065	CFV4975	PENDING	247522458	Refund Generated due to proration on Bill #0051678065-2020-2020-0000-00	Vehicle Sold	05/11/2022	C ADVL	Tax	($19.18)	$0.00	($19.18)
														CI04ADVL	Tax	($16.33)	$0.00	($16.33)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$35.51
BENTON, LINDA MCGUIRE	BENTON, LINDA MCGUIRE	BENTON, FERLON EUGENE	637 PEACE HAVEN RD		KANNAPOLIS, NC 28083	Proration	0048892372	EFD5072	PENDING	248718630	Refund Generated due to proration on Bill #0048892372-2021-2021-0000-00	Vehicle Sold	05/26/2022	C ADVL	Tax	($190.83)	$0.00	($190.83)
														CI04ADVL	Tax	($162.47)	$0.00	($162.47)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$353.30
BIBB, MICHAEL LOUIS	BIBB, MICHAEL LOUIS	BIBB, CAILYN ANNALECE	9908 HOLLY CENTER DR	APT 106	HUNTERSVILLE, NC 28078	Proration	0048307415	FJT1805	PENDING	248228496	Refund Generated due to proration on Bill #0048307415-2020-2020-0000-00	Processed in error	05/20/2022	C ADVL	Tax	($81.31)	$0.00	($81.31)
														CI02ADVL	Tax	($52.74)	$0.00	($52.74)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$134.05
BOYS & GIRLS CLUB OF CABARRUS COUNTY	BOYS & GIRLS CLUB OF CABARRUS COUNTY		PO BOX 1405		CONCORD, NC 28026	Adjustment < $100	0066462360	RDW8964	PENDING	248605185	Refund Generated due to adjustment on Bill #0066462360-2021-2021-0000-00	Exempt Property	05/25/2022	C ADVL	Tax	($7.40)	$0.00	($7.40)
														CI02ADVL	Tax	($4.80)	$0.00	($4.80)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$42.20
BOYS & GIRLS CLUB OF CABARRUS COUNTY	BOYS & GIRLS CLUB OF CABARRUS COUNTY		PO BOX 1405		CONCORD, NC 28026	Adjustment < $100	0066462380	RDW8965	PENDING	248605188	Refund Generated due to adjustment on Bill #0066462380-2021-2021-0000-00	Exempt Property	05/25/2022	C ADVL	Tax	($7.40)	$0.00	($7.40)
														CI02ADVL	Tax	($4.80)	$0.00	($4.80)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$42.20
BOYS & GIRLS CLUB OF CABARRUS COUNTY	BOYS & GIRLS CLUB OF CABARRUS COUNTY		PO BOX 1405		CONCORD, NC 28026	Adjustment < $100	0066462399	RDW8966	PENDING	248605191	Refund Generated due to adjustment on Bill #0066462399-2021-2021-0000-00	Exempt Property	05/25/2022	C ADVL	Tax	($7.40)	$0.00	($7.40)
														CI02ADVL	Tax	($4.80)	$0.00	($4.80)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$42.20
BOYS & GIRLS CLUB OF CABARRUS COUNTY	BOYS & GIRLS CLUB OF CABARRUS COUNTY		PO BOX 1405		CONCORD, NC 28026	Adjustment < $100	0066608683	KAY3527	PENDING	248605182	Refund Generated due to adjustment on Bill #0066608683-2021-2021-0000-00	Exempt Property	05/25/2022	C ADVL	Tax	($3.70)	$0.00	($3.70)
														CI02ADVL	Tax	($2.40)	$0.00	($2.40)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$36.10

North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 6/3/2022 8:07:19 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
BOYS AND GIRLS CLUB OF CABARRUS	BOYS AND GIRLS CLUB OF CABARRUS		PO BOX 1405		CONCORD, NC 28026	Adjustment < $100	0066609469	EBZ5086	PENDING	248605179	Refund Generated due to adjustment on Bill #0066609469-2021-2021-0000-00	Exempt Property	05/25/2022	C ADVL	Tax	($12.88)	$0.00	($12.88)
														CI02ADVL	Tax	($8.35)	$0.00	($8.35)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$51.23
BURRIS, MICHAEL ALEXANDER	BURRIS, MICHAEL ALEXANDER		95 KIRKWOOD DR		CONCORD, NC 28025	Adjustment >= $100	0066592721	79694	PENDING	248130303	Refund Generated due to adjustment on Bill #0066592721-2021-2021-0000-00	Adjustment	05/19/2022	C ADVL	Tax	($169.46)	$0.00	($169.46)
														CI02ADVL	Tax	($109.92)	$0.00	($109.92)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$279.38
CANUPP, ANTHONY LYNN	CANUPP, ANTHONY LYNN		418 JANIE ST		KANNAPOLIS, NC 28083	Proration	0000920562	BFF5639	PENDING	247782900	Refund Generated due to proration on Bill #0000920562-2021-2021-0000-00	Vehicle Sold	05/16/2022	C ADVL	Tax	($37.21)	$0.00	($37.21)
														CI04ADVL	Tax	($31.68)	$0.00	($31.68)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$68.89
CAPRIETTA, ANTHONY RUDOLPH	CAPRIETTA, ANTHONY RUDOLPH		9545 PRESSLEY DR NW		CONCORD, NC 28027	Proration	0061010073	TCH5978	PENDING	247427289	Refund Generated due to proration on Bill #0061010073-2020-2020-0000-00	Vehicle Sold	05/10/2022	C ADVL	Tax	($69.58)	$0.00	($69.58)
														CI02ADVL	Tax	($45.14)	$0.00	($45.14)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$114.72
CARRIKER, SHEILA BARBEE	CARRIKER, SHEILA BARBEE		11760 FLOWES STORE RD		MIDLAND, NC 28107	Proration	0014335974	HME4015	PENDING	165650374	Refund Generated due to proration on Bill #0014335974-2021-	Vehicle Sold	05/24/2022	C ADVL	Tax	($38.05)	$0.00	($38.05)
														FR14ADVL	Tax	($3.60)	$0.00	($3.60)
																	Refund	$41.65
CARTER, BOBBY WILSON	CARTER, BOBBY WILSON	CARTER, JULIA LAMBERT	4780 CRELLMAN WAY		KANNAPOLIS, NC 28081	Proration	0032700333	ZVL8343	PENDING	247202694	Refund Generated due to proration on Bill #0032700333-2020-2020-0000-00	Vehicle Sold	05/06/2022	C ADVL	Tax	($3.75)	$0.00	($3.75)
														CI04ADVL	Tax	($3.19)	$0.00	($3.19)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$6.94
CASTILLO GONZALES, LYTZI STEPHANIE	CASTILLO GONZALES, LYTZI STEPHANIE		269 MISENHEIMER DR NW		CONCORD, NC 28025	Proration	0064755550	JML4662	PENDING	247924209	Refund Generated due to proration on Bill #0064755550-2021-2021-0000-00	Vehicle Totalled	05/17/2022	C ADVL	Tax	($76.47)	($3.83)	($80.30)
														CI02ADVL	Tax	($49.60)	($2.48)	($52.08)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$132.38
CEGLIE, NICOLE JANET	CEGLIE, NICOLE JANET		7260 BAYBROOKE LN		HARRISBURG, NC 28075	Proration	0008913810	CBE8594	PENDING	165485918	Refund Generated due to proration on Bill #0008913810-2021-	Vehicle Sold	05/20/2022	C ADVL	Tax	($14.92)	$0.00	($14.92)
														CI01ADVL	Tax	($7.16)	$0.00	($7.16)
																	Refund	$22.08
CHIARA, SHARI ANN	CHIARA, SHARI ANN	CHIARA, JEFFREY STEPHEN	10926 RIVER OAKS DR NW		CONCORD, NC 28027	Proration	0053086780	TAL4277	PENDING	248837670	Refund Generated due to proration on Bill #0053086780-2020-2020-0000-00	Vehicle Sold	05/27/2022	C ADVL	Tax	($8.49)	$0.00	($8.49)
														CI02ADVL	Tax	($5.51)	$0.00	($5.51)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$14.00
CLONTZ, DEBRA RUSHING	CLONTZ, DEBRA RUSHING		49536 WOOD LAND DR		NORWOOD, NC 28128	Proration	0032159676	RBK4963	PENDING	164736970	Refund Generated due to proration on Bill #0032159676-2020-	Vehicle Totalled	05/05/2022	C ADVL	Tax	($18.44)	$0.00	($18.44)
														CI06ADVL	Tax	($5.48)	$0.00	($5.48)
																	Refund	$23.92
CLONTZ, MARK EVERETTE	CLONTZ, MARK EVERETTE	CLONTZ, DEBRA RUSHING	49536 WOOD LAND DR		NORWOOD, NC 28128	Proration	0039296602	DKS8095	PENDING	164736964	Refund Generated due to proration on Bill #0039296602-2021-	Incomplete Doc	05/05/2022	C ADVL	Tax	($63.70)	$0.00	($63.70)
														CI06ADVL	Tax	($18.94)	$0.00	($18.94)
																	Refund	$82.64
CONTRERAS JIMENEZ, CLARITA	CONTRERAS JIMENEZ, CLARITA		2905 PLANTATION RD NW		CONCORD, NC 28027	Proration	0063812481	JJJ1475	PENDING	248605098	Refund Generated due to proration on Bill #0063812481-2021-2021-0000-00	Vehicle Sold	05/25/2022	C ADVL	Tax	($40.03)	$0.00	($40.03)
														CI02ADVL	Tax	($25.97)	$0.00	($25.97)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$66.00
COOKE, CHARLES	COOKE, CHARLES		1176 ASHEFORD	NW	CONCORD, NC 28027	Proration	0064556822	CN54380	PENDING	248718963	Refund Generated due to proration on Bill	Vehicle Sold	05/26/2022	C ADVL	Tax	($197.33)	$0.00	($197.33)
														CI02ADVL	Tax	($128.00)	$0.00	($128.00)

North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 6/3/2022 8:07:19 AM

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
STEVEN JR	STEVEN JR		GREEN AVE								#0064556822-2021-2021-0000-00			CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$325.33
COTELL, ALTYN MEREDOVNA	COTELL, ALTYN MEREDOVNA		7955 DELL DR		HARRISBURG, NC 28075	Proration	0064805594	RBM7339	PENDING	164951392	Refund Generated due to proration on Bill #0064805594-2021-	Vehicle Sold	05/10/2022	C ADVL	Tax	($251.49)	$0.00	($251.49)
														CI01ADVL	Tax	($120.65)	$0.00	($120.65)
																	Refund	$372.14
COTELL, ALTYN MEREDOVNA	COTELL, ALTYN MEREDOVNA		7955 DELL DR		HARRISBURG, NC 28075	Proration	0065479380	KAD8642	PENDING	164951390	Refund Generated due to proration on Bill #0065479380-2021-	Vehicle Sold	05/10/2022	C ADVL	Tax	($317.22)	$0.00	($317.22)
														CI01ADVL	Tax	($152.17)	$0.00	($152.17)
																	Refund	$469.39
DAMIANI, VIVIAN ILLUZZI	DAMIANI, VIVIAN ILLUZZI		1456 WHITMAN DR NW		CONCORD, NC 28027	Proration	0064627838	TJV6424	PENDING	247609212	Refund Generated due to proration on Bill #0064627838-2021-2021-0000-00	Vehicle Sold	05/12/2022	C ADVL	Tax	($40.70)	$0.00	($40.70)
														CI02ADVL	Tax	($26.40)	$0.00	($26.40)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$67.10
DENNIS, KATHERINE PHIPPS MILLS	DENNIS, KATHERINE PHIPPS MILLS		5683 STAFFORD RD		CHARLOTTE, NC 28215	Proration	0052421823	JKP2588	PENDING	164951336	Refund Generated due to proration on Bill #0052421823-2021-	Vehicle Sold	05/10/2022	C ADVL	Tax	($64.38)	$0.00	($64.38)
														CI01ADVL	Tax	($30.88)	$0.00	($30.88)
																	Refund	$95.26
DIARRA, YAHYA	DIARRA, YAHYA		2848 EAGLE VIEW PL NW		CONCORD, NC 28027	Proration	0053247826	TCE1905	PENDING	248476254	Refund Generated due to proration on Bill #0053247826-2021-2021-0000-00	Vehicle Sold	05/24/2022	C ADVL	Tax	($32.56)	$0.00	($32.56)
														CI02ADVL	Tax	($21.12)	$0.00	($21.12)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$53.68
ELLIS, KIMBERLY FAYE	ELLIS, KIMBERLY FAYE		118 TIMBERLAKE DR		FLORENCE, SC 29501	Proration	0050883748	JEC9421	PENDING	248130276	Refund Generated due to proration on Bill #0050883748-2021-2021-0000-00	Reg . Out of state	05/19/2022	C ADVL	Tax	($32.08)	$0.00	($32.08)
														CI04ADVL	Tax	($27.32)	$0.00	($27.32)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$59.40
EUDY, RICKEY LYNN	EUDY, RICKEY LYNN		8201 COUNTY LINE RD		MOUNT PLEASANT, NC 28124	Proration	0064094597	XN8566	PENDING	164801934	Refund Generated due to proration on Bill #0064094597-2021-	Vehicle Sold	05/06/2022	C ADVL	Tax	($86.52)	$0.00	($86.52)
														FR13ADVL	Tax	($10.76)	$0.00	($10.76)
																	Refund	$97.28
FAGAN, MEREDITH MONROE	FAGAN, MEREDITH MONROE		2880 BARR RD		CONCORD, NC 28027	Proration	0060155981	JCZ3666	PENDING	248130345	Refund Generated due to proration on Bill #0060155981-2021-2021-0000-00	Vehicle Sold	05/19/2022	C ADVL	Tax	($146.46)	$0.00	($146.46)
														CI04ADVL	Tax	($124.68)	$0.00	($124.68)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$271.14
FAIELLA, SALLY ANN	FAIELLA, SALLY ANN	VAHL, JAMES RYAN	6600 PHARR MILL RD		HARRISBURG, NC 28075	Proration	0059568641	JKY6887	PENDING	164802262	Refund Generated due to proration on Bill #0059568641-2021-	Vehicle Sold	05/06/2022	C ADVL	Tax	($235.18)	$0.00	($235.18)
														CI01ADVL	Tax	($112.82)	$0.00	($112.82)
																	Refund	$348.00
FERREE, ANTHONY WAYNE	FERREE, ANTHONY WAYNE		7049 BOVINE LN		HARRISBURG, NC 28075	Proration	0064004100	JAK1781	PENDING	165891486	Refund Generated due to proration on Bill #0064004100-2021-	Vehicle Sold	05/27/2022	C ADVL	Tax	($440.05)	$0.00	($440.05)
														CI01ADVL	Tax	($211.11)	$0.00	($211.11)
																	Refund	$651.16
FRANKLIN, LAWRENCE KENNETH	FRANKLIN, LAWRENCE KENNETH		PO BOX 1143		KANNAPOLIS, NC 28082	Proration	0064044406	DAS4792	PENDING	247416387	Refund Generated due to proration on Bill #0064044406-2021-2021-0000-00	Vehicle Totalled	05/09/2022	C ADVL	Tax	($78.56)	$0.00	($78.56)
														CI04ADVL	Tax	($66.88)	$0.00	($66.88)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$145.44
FRAZIER, SHERI LYNETTE	FRAZIER, SHERI LYNETTE		844 RICHARDSON WAY		CONCORD, NC 28027	Proration	0057842554	TPC6600	PENDING	248228673	Refund Generated due to proration on Bill #0057842554-2021-2021-0000-00	Vehicle Totalled	05/20/2022	C ADVL	Tax	($188.75)	$0.00	($188.75)
														CI02ADVL	Tax	($122.44)	$0.00	($122.44)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$311.19
GANDY, RICHARD LEE	GANDY, RICHARD LEE		781 KING FREDRICK LN		CONCORD, NC 28027	Proration	0057379653	HDR3497	PENDING	248718951	Refund Generated due to proration on Bill	Vehicle Sold	05/26/2022	C ADVL	Tax	($171.48)	$0.00	($171.48)
														CI02ADVL	Tax	($111.23)	$0.00	($111.23)

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
			SW								#0057379653-2021-2021-0000-00			CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$282.71
GARCIA, GODOFREDO IGNO	GARCIA, GODOFREDO IGNO		3008 JAMESON DR NW		CONCORD, NC 28027	Proration	0028791859	HKJ4442	PENDING	248130744	Refund Generated due to proration on Bill #0028791859-2021-2021-0000-00	Vehicle Sold	05/19/2022	C ADVL	Tax	($24.42)	$0.00	($24.42)
														CI02ADVL	Tax	($15.84)	$0.00	($15.84)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$40.26
GIULIANO, STEPHEN	GIULIANO, STEPHEN	GIULIANO, PRISCILLA ANN	5879 MAHOGANY PL SW		CONCORD, NC 28025	Proration	0032536647	DHH9160	PENDING	248837346	Refund Generated due to proration on Bill #0032536647-2021-2021-0000-00	Vehicle Sold	05/27/2022	C ADVL	Tax	($14.18)	$0.00	($14.18)
														CI02ADVL	Tax	($9.20)	$0.00	($9.20)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$23.38
GREER, DON KEALII LANI	GREER, DON KEALII LANI		4676 GARRISON INN CT NW		CONCORD, NC 28027	Proration	0020228868	AL000HA	PENDING	247105158	Refund Generated due to proration on Bill #0020228868-2021-2021-0000-00	Vehicle Sold	05/05/2022	C ADVL	Tax	($42.86)	$0.00	($42.86)
														CI02ADVL	Tax	($27.80)	$0.00	($27.80)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$70.66
GREWELL, KENDALL SCOTT	GREWELL, KENDALL SCOTT		617 SKYBROOK DR		HUNTERSVILLE, NC 28078	Proration	0000900904	HMA6252	PENDING	165131750	Refund Generated due to proration on Bill #0000900904-2021-	Vehicle Sold	05/13/2022	C ADVL	Tax	($13.57)	$0.00	($13.57)
														FR11ADVL	Tax	($1.25)	$0.00	($1.25)
																	Refund	$14.82
GURUKUVELLI, HARI KRISHNA	GURUKUVELLI, HARI KRISHNA		3944 TOKAY LANE		FORT MILL, SC 29707	Proration	0048881002	PDX9097	PENDING	248130519	Refund Generated due to proration on Bill #0048881002-2021-2021-0000-00	Reg . Out of state	05/19/2022	C ADVL	Tax	($19.40)	$0.00	($19.40)
														CI02ADVL	Tax	($12.58)	$0.00	($12.58)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$31.98
HADDAD, ADDISON BLAKE	HADDAD, ADDISON BLAKE	HADDAD, JESSICA FAYE-GOMEZ	119 YORK AVE		KANNAPOLIS, NC 28083	Proration	0051803596	TBN7105	PENDING	248228406	Refund Generated due to proration on Bill #0051803596-2021-2021-0000-00	Vehicle Sold	05/20/2022	C ADVL	Tax	($28.86)	($1.45)	($30.31)
														CI04ADVL	Tax	($24.57)	($1.22)	($25.79)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$56.10
HAFEEZ, SHAIKH RASHID	HAFEEZ, SHAIKH RASHID	HAFEEZ, FURQAN RASHID	3616 MCDUFF CT		HARRISBURG, NC 28075	Proration	0062799454	JHV7277	PENDING	165812906	Refund Generated due to proration on Bill #0062799454-2021-	Vehicle Sold	05/26/2022	C ADVL	Tax	($66.17)	$0.00	($66.17)
														CI01ADVL	Tax	($31.75)	$0.00	($31.75)
																	Refund	$97.92
HAIGLER, MATTHEW RYAN	HAIGLER, MATTHEW RYAN		3111 WALLACE RD		MIDLAND, NC 28107	Proration	0058260739	EHZ8186	PENDING	164801782	Refund Generated due to proration on Bill #0058260739-2021-	Vehicle Sold	05/06/2022	C ADVL	Tax	($158.87)	$0.00	($158.87)
														CI06ADVL	Tax	($47.23)	$0.00	($47.23)
																	Refund	$206.10
HALE, TIMOTHY JOE	HALE, TIMOTHY JOE	HALE, CYNTHIA ALAYNE	88 HICKORY GROVE DR SW		CONCORD, NC 28027	Proration	0057548540	TDW9239	PENDING	248719056	Refund Generated due to proration on Bill #0057548540-2021-2021-0000-00	Vehicle Sold	05/26/2022	C ADVL	Tax	($39.92)	$0.00	($39.92)
														CI02ADVL	Tax	($25.89)	$0.00	($25.89)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$65.81
HALLENBECK, CRYSTAL SHEREEN	HALLENBECK, CRYSTAL SHEREEN		3041 PARADE LN SW		CONCORD, NC 28025	Proration	0044830547	FJN1900	PENDING	248033436	Refund Generated due to proration on Bill #0044830547-2021-2021-0000-00	Vehicle Sold	05/18/2022	C ADVL	Tax	($3.11)	$0.00	($3.11)
														CI02ADVL	Tax	($2.02)	$0.00	($2.02)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$5.13
HARDY, EDWARD GRADY	HARDY, EDWARD GRADY		2151 BARNHARDT AVE NW		CONCORD, NC 28027	Proration	0061786063	BCD1929	PENDING	247924056	Refund Generated due to proration on Bill #0061786063-2021-2021-0000-00	Vehicle Sold	05/17/2022	C ADVL	Tax	($126.01)	$0.00	($126.01)
														CI02ADVL	Tax	($81.73)	$0.00	($81.73)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$207.74
HARRINGTON, KELLY PARK	HARRINGTON, KELLY PARK		4348 BURGIN ST		KANNAPOLIS, NC 28081	Proration	0058227338	BSHEEPDG	PENDING	248460726	Refund Generated due to proration on Bill #0058227338-2021-	Vehicle Sold	05/23/2022	C ADVL	Tax	($201.26)	$0.00	($201.26)
														CI04ADVL	Tax	($171.34)	$0.00	($171.34)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
											2021-0000-00						Refund	$372.60
HAYES, STEPHEN PATRICK	HAYES, STEPHEN PATRICK		591 SANDRINGHAM PL		CONCORD, NC 28025	Adjustment >= $100	0065985485	RAT6778	PENDING	247522404	Refund Generated due to adjustment on Bill #0065985485-2021-2021-0000-00	Adjustment	05/11/2022	C ADVL	Tax	($315.98)	$0.00	($315.98)
														CI02ADVL	Tax	($204.96)	$0.00	($204.96)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$520.94
HEFFNER, JEREMY SCOTT	HEFFNER, JEREMY SCOTT		3975 GROVESNER ST		HARRISBURG, NC 28075	Proration	0047128376	FHH7543	PENDING	165650500	Refund Generated due to proration on Bill #0047128376-2020-	Vehicle Sold	05/24/2022	C ADVL	Tax	($5.86)	$0.00	($5.86)
														CI01ADVL	Tax	($2.81)	$0.00	($2.81)
																	Refund	$8.67
HELOCK, MICHAEL GEORGE III	HELOCK, MICHAEL GEORGE III		7704 ORCHARD PARK CIR		HARRISBURG, NC 28075	Proration	0044571025	EJA7623	PENDING	164801940	Refund Generated due to proration on Bill #0044571025-2021-	Vehicle Sold	05/06/2022	C ADVL	Tax	($69.82)	$0.00	($69.82)
														CI01ADVL	Tax	($33.49)	$0.00	($33.49)
																	Refund	$103.31
HIGH, KEALEY SHONTE	HIGH, KEALEY SHONTE		7207 SAGEBRUSH CIR		CONCORD, NC 28025	Proration	0047970358	HBJ7175	PENDING	164736614	Refund Generated due to proration on Bill #0047970358-2020-	Vehicle Sold	05/05/2022	C ADVL	Tax	($7.96)	$0.00	($7.96)
														FR14ADVL	Tax	($0.75)	$0.00	($0.75)
																	Refund	$8.71
HIPPS, KRISSY LAMBERT	HIPPS, KRISSY LAMBERT		3660 LAMBERT RD		MOUNT PLEASANT, NC 28124	Proration	0064262695	JKE5336	PENDING	165355516	Refund Generated due to proration on Bill #0064262695-2021-	Processed in error	05/18/2022	C ADVL	Tax	($197.74)	($9.89)	($207.63)
														FR16ADVL	Tax	($31.53)	($1.57)	($33.10)
																	Refund	$240.73
HODGES, AARON MITCHELL	HODGES, AARON MITCHELL		361 AYCOCK ST NE		CONCORD, NC 28025	Proration	0062699556	JFH7148	PENDING	246847668	Refund Generated due to proration on Bill #0062699556-2021-2021-0000-00	Used incorrect date	05/02/2022	C ADVL	Tax	($58.04)	$0.00	($58.04)
														CI02ADVL	Tax	($37.65)	$0.00	($37.65)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$95.69
HORN, GABRIEL KENNAN	HORN, GABRIEL KENNAN		8417 MOSSY CUP TRL		HARRISBURG, NC 28075	Proration	0048195776	TPE3694	PENDING	164951280	Refund Generated due to proration on Bill #0048195776-2020-	Vehicle Sold	05/10/2022	C ADVL	Tax	($32.36)	($1.62)	($33.98)
														CI01ADVL	Tax	($15.53)	($0.77)	($16.30)
																	Refund	$50.28
HOUSE, RICKIE JO	HOUSE, RICKIE JO	HOUSE, KESHINI	500 PEACE HAVEN RD		KANNAPOLIS, NC 28083	Proration	0040017656	EKA9063	PENDING	248605299	Refund Generated due to proration on Bill #0040017656-2021-2021-0000-00	Vehicle Sold	05/25/2022	C ADVL	Tax	($116.98)	$0.00	($116.98)
														CI04ADVL	Tax	($99.59)	$0.00	($99.59)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$216.57
HOUSE, RICKIE JO	HOUSE, RICKIE JO		500 PEACE HAVEN RD		KANNAPOLIS, NC 28083	Proration	0065388014	CJ97897	PENDING	246999465	Refund Generated due to proration on Bill #0065388014-2021-2021-0000-00	Vehicle Sold	05/04/2022	C ADVL	Tax	($110.91)	$0.00	($110.91)
														CI04ADVL	Tax	($94.42)	$0.00	($94.42)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$205.33
INGLE, KENNETH GERALD	INGLE, KENNETH GERALD	INGLE, TERESA ANN	7194 BARLEY WOOD DR		LOCUST, NC 28097	Proration	0059604946	JDR5767	PENDING	330840376	Refund Generated due to proration on Bill #0059604946-2021-2021-0000-00	Vehicle Totalled	05/19/2022	C ADVL	Tax	($67.63)	$0.00	($67.63)
														CI05ADVL	Tax	($32.90)	$0.00	($32.90)
														CI05ADVL	Vehicle Fee	$0.00	$0.00	$0.00
														FR05ADVL	Tax	($9.14)	$0.00	($9.14)
																	Refund	$109.67
JAMES, JENNIFER ARNOLD	JAMES, JENNIFER ARNOLD		615 GATSBY PL NW		CONCORD, NC 28027	Proration	0061227765	TDW9106	PENDING	246999750	Refund Generated due to proration on Bill #0061227765-2020-2020-0000-00	Vehicle Sold	05/04/2022	C ADVL	Tax	($5.16)	($0.30)	($5.46)
														CI02ADVL	Tax	($3.34)	($0.19)	($3.53)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$8.99
JENERETTE, WAYMOND CHRISTOPHE	JENERETTE, WAYMOND CHRISTOPHE	HALL-JENERETTE, TARA	417 PINEY CHURCH RD		CONCORD, NC 28025	Proration	0061199516	G0DLY2	PENDING	165891758	Refund Generated due to proration on Bill #0061199516-2020-	Vehicle Sold	05/27/2022	C ADVL	Tax	($79.76)	$0.00	($79.76)
														FR04ADVL	Tax	($8.08)	$0.00	($8.08)
																	Refund	$87.84
KAMARAJ, VENKATATHIR	KAMARAJ, VENKATATHIR		9569 CREIGHTON		CONCORD, NC 28027	Proration	0061919672	TDD9631	PENDING	247202916	Refund Generated due to proration on Bill	Vehicle Sold	05/06/2022	C ADVL	Tax	($66.08)	($3.30)	($69.38)
														CI02ADVL	Tax	($42.86)	($2.14)	($45.00)

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
I	I		RD NW								#0061919672-2020-2020-0000-00			CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$114.38
KIGER, CALEB TODD	KIGER, CALEB TODD		1564 CAMBRIDGE HEIGHTS PL NW		CONCORD, NC 28027	Proration	0057720709	FAZ3634	PENDING	246999285	Refund Generated due to proration on Bill #0057720709-2021-2021-0000-00	Vehicle Sold	05/04/2022	C ADVL	Tax	($71.04)	$0.00	($71.04)
														CI02ADVL	Tax	($46.08)	$0.00	($46.08)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$117.12
KIGER, CALEB TODD	KIGER, CALEB TODD		1564 CAMBRIDGE HEIGHTS PL NW		CONCORD, NC 28027	Proration	0057599896	RBH9727	PENDING	246999291	Refund Generated due to proration on Bill #0057599896-2021-2021-0000-00	Vehicle Sold	05/04/2022	C ADVL	Tax	($32.74)	$0.00	($32.74)
														CI02ADVL	Tax	($21.24)	$0.00	($21.24)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$53.98
KIM, YOUNG MU	KIM, YOUNG MU		5917 MAPLE VIEW PL		HARRISBURG, NC 28075	Proration	0014345971	JAL8664	PENDING	166111446	Refund Generated due to proration on Bill #0014345971-2021-	Vehicle Sold	05/31/2022	C ADVL	Tax	($47.79)	$0.00	($47.79)
														CI01ADVL	Tax	($22.92)	$0.00	($22.92)
																	Refund	$70.71
LAMBERT, BRIAN KEITH	LAMBERT, BRIAN KEITH		PO BOX 1105		CONCORD, NC 28026	Proration	0063005727	8C9495	PENDING	165640508	Refund Generated due to proration on Bill #0063005727-2021-	Vehicle Sold	05/23/2022	C ADVL	Tax	($127.06)	$0.00	($127.06)
														FR11ADVL	Tax	($11.68)	$0.00	($11.68)
																	Refund	$138.74
LINKER, GARY ALAN	LINKER, GARY ALAN		4882 OLD SALISBURY	CONCORD RD	KANNAPOLIS, NC 28083	Adjustment < $100	0066434928	CN61738	PENDING	329604184	Refund Generated due to adjustment on Bill #0066434928-2021-2021-0000	Situs error	05/06/2022	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($1.44)	$0.00	($1.44)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR09ADVL	Tax	$0.25	$0.00	$0.25
																	Refund	$31.19
LLOYD, HAROLD RODNEY II	LLOYD, HAROLD RODNEY II	LLOYD, ISMENIA	1855 BRIARCREST DR NW		CHARLOTTE, NC 28269	Proration	0057913895	RCB9555	PENDING	247427232	Refund Generated due to proration on Bill #0057913895-2021-2021-0000-00	Vehicle Totalled	05/10/2022	C ADVL	Tax	($88.96)	($4.44)	($93.40)
														CI02ADVL	Tax	($57.71)	($2.89)	($60.60)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$154.00
LOUCKS, GERALD THOMAS	LOUCKS, GERALD THOMAS	LOUCKS, MELISSA LYNN	3873 FRENCH FIELDS LN		HARRISBURG, NC 28075	Proration	0056959521	AJX1036	PENDING	164565384	Refund Generated due to proration on Bill #0056959521-2021-	Vehicle Sold	05/02/2022	C ADVL	Tax	($42.69)	$0.00	($42.69)
														CI01ADVL	Tax	($20.48)	$0.00	($20.48)
																	Refund	$63.17
LOWDER, SCOT BYRON	LOWDER, SCOT BYRON		1153 N WINDSOR DR		KANNAPOLIS, NC 28081	Proration	0032103294	DLF3037	PENDING	249167226	Refund Generated due to proration on Bill #0032103294-2020-2020-0000-00	Vehicle Sold	05/31/2022	C ADVL	Tax	($13.89)	$0.00	($13.89)
														CI04ADVL	Tax	($11.82)	$0.00	($11.82)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$25.71
MAREMANDA, RAVIKIRAN	MAREMANDA, RAVIKIRAN		11046 DISCOVERY DR NW		CONCORD, NC 28027	Proration	0062586661	JHK5866	PENDING	246872241	Refund Generated due to proration on Bill #0062586661-2021-2021-0000-00	Vehicle Sold	05/03/2022	C ADVL	Tax	($17.68)	$0.00	($17.68)
														CI02ADVL	Tax	($11.47)	$0.00	($11.47)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$29.15
MEDLIN, KIM LELAND	MEDLIN, KIM LELAND	MEDLIN, LINSEY NICOLE	7505 THOMAS DR	UNIT 1113	PANAMA CITY BEACH, FL 32408	Proration	0041874119	EMD2572	PENDING	165014976	Refund Generated due to proration on Bill #0041874119-2020-	Reg . Out of state	05/11/2022	C ADVL	Tax	($10.67)	$0.00	($10.67)
														CI03ADVL	Tax	($7.28)	$0.00	($7.28)
																	Refund	$17.95
MITCHELL, CYNTHIA WEATHERS	MITCHELL, CYNTHIA WEATHERS		93 BUFFALO AVE NW		CONCORD, NC 28025	Proration	0049176959	SKJESUS	PENDING	248032995	Refund Generated due to proration on Bill #0049176959-2021-2021-0000-00	Vehicle Totalled	05/18/2022	C ADVL	Tax	($43.29)	$0.00	($43.29)
														CI02ADVL	Tax	($28.08)	$0.00	($28.08)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$71.37
MITCHELL, TAKIA JOANNE	MITCHELL, TAKIA JOANNE		178 WILKINSON CT SE	APT 1	CONCORD, NC 28025	Proration	0046852822	FMV1412	PENDING	248130027	Refund Generated due to proration on Bill #0046852822-2021-	Vehicle Totalled	05/19/2022	C ADVL	Tax	($58.27)	$0.00	($58.27)
														CI02ADVL	Tax	($37.80)	$0.00	($37.80)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
DARBY	DARBY										2021-0000-00						Refund	$96.07
MURPH, CHAD HARLAN	MURPH, CHAD HARLAN		2550 PARKS LAFFERTY RD		CONCORD, NC 28025	Adjustment < $100	0066658915	8N8645	PENDING	331473568	Refund Generated due to adjustment on Bill #0066658915-2021-2021-0000	Situs error	05/25/2022	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($62.40)	$0.00	($62.40)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR14ADVL	Tax	$9.10	$0.00	$9.10
																	Refund	$83.30
ORDASZ, BRIAN JOSEPH	ORDASZ, BRIAN JOSEPH		1874 WALDECK CT		MOUNT PLEASANT, NC 28124	Proration	0063559929	HY9769	PENDING	165355392	Refund Generated due to proration on Bill #0063559929-2021-	Vehicle Sold	05/18/2022	C ADVL	Tax	($153.90)	$0.00	($153.90)
														CI03ADVL	Tax	($105.03)	$0.00	($105.03)
																	Refund	$258.93
PARKHOUSE, RUSSELL JAMES	PARKHOUSE, RUSSELL JAMES	PARKHOUSE, ANGELA CHRISTINE HANGEN	9959 LEGOLAS LN		CHARLOTTE, NC 28269	Proration	0063153093	ZVW3732	PENDING	247923978	Refund Generated due to proration on Bill #0063153093-2020-2020-0000-00	Vehicle Sold	05/17/2022	C ADVL	Tax	($42.65)	$0.00	($42.65)
														CI02ADVL	Tax	($27.66)	$0.00	($27.66)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$70.31
PATEL, RAJESH SAILESHKUMAR	PATEL, RAJESH SAILESHKUMAR		1265 TRANQUILITY POINT AV	NW	CONCORD, NC 28027	Proration	0057325675	FJV4289	PENDING	247522272	Refund Generated due to proration on Bill #0057325675-2021-2021-0000-00	Vehicle Sold	05/11/2022	C ADVL	Tax	($44.25)	$0.00	($44.25)
														CI02ADVL	Tax	($28.71)	$0.00	($28.71)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$72.96
PATHI, SANDEEP CHERLAM	PATHI, SANDEEP CHERLAM		8341 MARIGOLD PL		HARRISBURG, NC 28075	Proration	0058592338	JLB3996	PENDING	165891592	Refund Generated due to proration on Bill #0058592338-2021-	Vehicle Sold	05/27/2022	C ADVL	Tax	($67.22)	$0.00	($67.22)
														CI01ADVL	Tax	($32.25)	$0.00	($32.25)
																	Refund	$99.47
PAUDYAL, BIJAYA BABU	PAUDYAL, BIJAYA BABU		3555 COUNTY DOWN AVE		KANNAPOLIS, NC 28081	Proration	0043784941	PHJ3307	PENDING	246847029	Refund Generated due to proration on Bill #0043784941-2021-2021-0000-00	Vehicle Sold	05/02/2022	C ADVL	Tax	($40.14)	$0.00	($40.14)
														CI04ADVL	Tax	($34.18)	$0.00	($34.18)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$74.32
PAWAR, SHAILESH HANUMANT	PAWAR, SHAILESH HANUMANT		11151 JC MURRAY DR NW		CONCORD, NC 28027	Proration	0064202549	FCA7038	PENDING	247783164	Refund Generated due to proration on Bill #0064202549-2021-2021-0000-00	Vehicle Sold	05/16/2022	C ADVL	Tax	($152.83)	$0.00	($152.83)
														CI02ADVL	Tax	($99.13)	$0.00	($99.13)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$251.96
PENNINGER, JOHN CALDWELL III	PENNINGER, JOHN CALDWELL III		510 GOLDMOOR DR NE		CONCORD, NC 28025	Proration	0056909957	M1ZBHAVN	PENDING	247782615	Refund Generated due to proration on Bill #0056909957-2021-2021-0000-00	Vehicle Sold	05/16/2022	C ADVL	Tax	($193.73)	($11.13)	($204.86)
														CI02ADVL	Tax	($125.66)	($7.23)	($132.89)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$337.75
PHILLIPS, KIMBERLIE BRADSHAW	PHILLIPS, KIMBERLIE BRADSHAW		10020 EARNHARDT LAKE RD		DAVIDSON, NC 28036	Proration	0057797286	HA9839	PENDING	165282274	Refund Generated due to proration on Bill #0057797286-2021-	Vehicle Sold	05/17/2022	C ADVL	Tax	($162.49)	$0.00	($162.49)
														FR11ADVL	Tax	($14.93)	$0.00	($14.93)
																	Refund	$177.42
POSEY, OTISQUEST LAMONT	POSEY, OTISQUEST LAMONT		2805 TRESTLE CT SW		CONCORD, NC 28025	Proration	0039283729	PCM6832	PENDING	248475216	Refund Generated due to proration on Bill #0039283729-2021-2021-0000-00	Vehicle Sold	05/24/2022	C ADVL	Tax	($28.17)	$0.00	($28.17)
														CI02ADVL	Tax	($18.27)	$0.00	($18.27)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$46.44
POWELL, SHIESHA MARIE	POWELL, SHIESHA MARIE		215 ROSS CIR	APT 215	MOUNT PLEASANT, NC 28124	Proration	0060683517	JAS2914	PENDING	165812408	Refund Generated due to proration on Bill #0060683517-2020-	Vehicle Sold	05/26/2022	C ADVL	Tax	($6.16)	$0.00	($6.16)
														CI03ADVL	Tax	($4.21)	$0.00	($4.21)
																	Refund	$10.37
POWELL, SHIESHA MARIE	POWELL, SHIESHA MARIE	POWELL, CARLA MARIE	215 ROSS CIR	APT 215	MOUNT PLEASANT, NC 28124	Proration	0064192486	EFT4653	PENDING	165891272	Refund Generated due to proration on Bill #0064192486-2021-	Vehicle Totalled	05/27/2022	C ADVL	Tax	($10.70)	$0.00	($10.70)
														CI03ADVL	Tax	($7.30)	$0.00	($7.30)
																	Refund	$18.00
PRINCE,	PRINCE,		2291		MIDLAND, NC	Proration	0046952223	JL9373	PENDING	164581312	Refund Generated due	Vehicle Sold	05/03/2022	C ADVL	Tax	($12.33)	$0.00	($12.33)

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
RONALD LAWRENCE	RONALD LAWRENCE		HOWELL RD		28107						to proration on Bill #0046952223-2021-			CI06ADVL	Tax	($3.67)	$0.00	($3.67)
																	Refund	$16.00
PRZYKUCKI, ANGELA MATTOS	PRZYKUCKI, ANGELA MATTOS	PRZYKUCKI, MICHAEL GERARD	10351 KIRKMONT DRIVE		CHARLOTTE, NC 28269	Proration	0033457633	0659SB	PENDING	247783161	Refund Generated due to proration on Bill #0033457633-2021-2021-0000-00	Vehicle Sold	05/16/2022	C ADVL	Tax	($9.77)	$0.00	($9.77)
														CI02ADVL	Tax	($6.34)	$0.00	($6.34)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$16.11
PULIMI, HARI KRISHNA REDDY	PULIMI, HARI KRISHNA REDDY		6981 FOUNDERS WAY		HARRISBURG, NC 28075	Proration	0056957325	PDM3691	PENDING	165072550	Refund Generated due to proration on Bill #0056957325-2021-	Vehicle Sold	05/12/2022	C ADVL	Tax	($82.54)	($4.13)	($86.67)
														CI01ADVL	Tax	($39.60)	($1.98)	($41.58)
																	Refund	$128.25
REECE, CHRISTOPHER ERIC	REECE, CHRISTOPHER ERIC	REECE, TAMISHA HOPKINS	5620 LOWER STONE CHURCH R	CHURCH RD	ROCKWELL, NC 28138	Adjustment < $100	0066593664	RVN1585	PENDING	330840904	Refund Generated due to adjustment on Bill #0066593664-2021-2021-0000	Situs error	05/19/2022	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($18.38)	$0.00	($18.38)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR08ADVL	Tax	$3.37	$0.00	$3.37
																	Refund	$45.01
RICHARDS, TERRY ROBERT	RICHARDS, TERRY ROBERT		4137 AMARILLO DR		CONCORD, NC 28027	Proration	0047299431	CL15680	PENDING	248837028	Refund Generated due to proration on Bill #0047299431-2021-2021-0000-00	Vehicle Sold	05/27/2022	C ADVL	Tax	($19.83)	$0.00	($19.83)
														CI02ADVL	Tax	($12.86)	$0.00	($12.86)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$32.69
RICHARDS, TERRY ROBERT	RICHARDS, TERRY ROBERT		4137 AMARILLO DR		CONCORD, NC 28027	Proration	0031735607	EBZ5819	PENDING	248837262	Refund Generated due to proration on Bill #0031735607-2021-2021-0000-00	Vehicle Sold	05/27/2022	C ADVL	Tax	($18.43)	$0.00	($18.43)
														CI02ADVL	Tax	($11.95)	$0.00	($11.95)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$60.38
ROBLES, KEVIN	ROBLES, KEVIN		1146 DANBROOKE DR		CONCORD, NC 28025	Proration	0063970233	HHM4552	PENDING	166111778	Refund Generated due to proration on Bill #0063970233-2021-	Vehicle Totalled	05/31/2022	C ADVL	Tax	($91.82)	$0.00	($91.82)
														FR04ADVL	Tax	($9.31)	$0.00	($9.31)
																	Refund	$101.13
ROBSON, HENRY EDWARD	ROBSON, HENRY EDWARD	ROBSON, LINDA LOU	1553 OAKWOOD AVE		KANNAPOLIS, NC 28081	Proration	0059262464	RBP4853	PENDING	248033385	Refund Generated due to proration on Bill #0059262464-2021-2021-0000-00	Vehicle Sold	05/18/2022	C ADVL	Tax	($31.86)	$0.00	($31.86)
														CI04ADVL	Tax	($27.12)	$0.00	($27.12)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$58.98
ROHRER, CYNTHIA GREY	ROHRER, CYNTHIA GREY		PO BOX 1249		CONCORD, NC 28026	Proration	0058557662	EJS7285	PENDING	247697616	Refund Generated due to proration on Bill #0058557662-2021-2021-0000-00	Vehicle Sold	05/13/2022	C ADVL	Tax	($197.94)	$0.00	($197.94)
														CI02ADVL	Tax	($128.39)	$0.00	($128.39)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$326.33
ROSA, ELIZABETH TESHIMA	ROSA, ELIZABETH TESHIMA		317 PITTS SCHOOL RD NW		CONCORD, NC 28027	Proration	0051955515	HME7225	PENDING	247203054	Refund Generated due to proration on Bill #0051955515-2021-2021-0000-00	Vehicle Sold	05/06/2022	C ADVL	Tax	($33.10)	$0.00	($33.10)
														CI02ADVL	Tax	($21.47)	$0.00	($21.47)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$54.57
ROWAN COUNTY TAX	JORDAN, DEANNA MABE	JORDAN, MICHAEL SHEA	PO BOX 707		CONCORD, NC 28026	Adjustment >= $100	0066149897	ELD4661	PENDING	247697043	[AS0168] - Refund Generated due to adjustment on abstract # : 0066149897-2021-	Situs error	05/13/2022	C ADVL	Tax	($58.61)	$0.00	($58.61)
														CI02ADVL	Tax	($38.02)	$0.00	($38.02)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$126.63
RUFFIN, MICHAEL MARK	RUFFIN, MICHAEL MARK		587 GEORGETOWN DR NW		CONCORD, NC 28027	Proration	0038890922	UMMR	PENDING	247202739	Refund Generated due to proration on Bill #0038890922-2021-2021-0000-00	Vehicle Sold	05/06/2022	C ADVL	Tax	($120.81)	$0.00	($120.81)
														CI02ADVL	Tax	($78.36)	$0.00	($78.36)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$199.17
SAYCHAY,	SAYCHAY,		135		CONCORD,	Proration	0065406473	KAH3699	PENDING	165640732	Refund Generated due	Vehicle	05/23/2022	C ADVL	Tax	($115.28)	$0.00	($115.28)

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
DARRIAN KONKHAM	DARRIAN KONKHAM		SCALYBARK TRL		NC 28027						to proration on Bill #0065406473-2021-	Totalled		FR11ADVL	Tax	($10.60)	$0.00	($10.60)
																	Refund	$125.88
SEYMOUR, LORA LYNETTE	SEYMOUR, LORA LYNETTE		66 MCCACHERN BLVD SE	# 111	CONCORD, NC 28025	Proration	0066529110	RDY9362	PENDING	166111480	Refund Generated due to proration on Bill #0066529110-2021-	Reg . Out of state	05/31/2022	C ADVL	Tax	($125.79)	$0.00	($125.79)
														FR16ADVL	Tax	($20.06)	$0.00	($20.06)
																	Refund	$145.85
SMITH, KATLYN MICHELLE	SMITH, KATLYN MICHELLE		9233 BARNETT RD		CONCORD, NC 28027	Proration	0055309631	DEX7467	PENDING	165355328	Refund Generated due to proration on Bill #0055309631-2020-	Vehicle Sold	05/18/2022	C ADVL	Tax	($27.26)	$0.00	($27.26)
														FR11ADVL	Tax	($2.50)	$0.00	($2.50)
																	Refund	$29.76
STOKES, CLARENCE JR	STOKES, CLARENCE JR		3310 KEADY MILL LOOP		KANNAPOLIS, NC 28081	Proration	0059323284	WVV5741	PENDING	248837190	Refund Generated due to proration on Bill #0059323284-2020-2020-0000-00	Vehicle Sold	05/27/2022	C ADVL	Tax	($24.20)	$0.00	($24.20)
														CI04ADVL	Tax	($20.61)	$0.00	($20.61)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$44.81
STOUDENMIRE, BARBARA ANN	STOUDENMIRE, BARBARA ANN		370 LLOYD GARMON LN		CONCORD, NC 28025	Proration	0063996793	HKH3731	PENDING	166111328	Refund Generated due to proration on Bill #0063996793-2021-	Vehicle Sold	05/31/2022	C ADVL	Tax	($132.58)	$0.00	($132.58)
														FR02ADVL	Tax	($25.08)	$0.00	($25.08)
																	Refund	$157.66
STUTTS, THOMAS JACKSON	STUTTS, THOMAS JACKSON	STUTTS, TERESA GRICE	3371 MERCHANT LN		DAVIDSON, NC 28036	Proration	0018028200	BT50144	PENDING	248130057	Refund Generated due to proration on Bill #0018028200-2020-2020-0000-00	Vehicle Sold	05/19/2022	C ADVL	Tax	($53.62)	$0.00	($53.62)
														CI04ADVL	Tax	($45.65)	$0.00	($45.65)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$99.27
TALLENT, MICHAEL EUGENE	TALLENT, MICHAEL EUGENE		12517 HOLT KAY RD		MIDLAND, NC 28107	Adjustment < $100	0066680794	FDJ1687	PENDING	331625244	Refund Generated due to adjustment on Bill #0066680794-2021-2021-0000	Situs error	05/26/2022	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($72.38)	($3.62)	($76.00)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														CI06ADVL	Tax	$33.18	$1.66	$34.84
																	Refund	$71.16
THOMPSON PENN, SHERRY ANNE	THOMPSON PENN, SHERRY ANNE		311 SQUIRE CIRCLE		PITTSBURG, PA 15212	Proration	0061141421	CM59832	PENDING	249166623	Refund Generated due to proration on Bill #0061141421-2020-2020-0000-00	Vehicle Sold	05/31/2022	C ADVL	Tax	($269.31)	($13.47)	($282.78)
														CI02ADVL	Tax	($174.69)	($8.73)	($183.42)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$466.20
TRAN, THANH DAO THI	TRAN, THANH DAO THI		9552 HERRINGBONE LN NW		CONCORD, NC 28027	Proration	0058061352	HMW9621	PENDING	247105107	Refund Generated due to proration on Bill #0058061352-2021-2021-0000-00	Vehicle Sold	05/05/2022	C ADVL	Tax	($192.32)	$0.00	($192.32)
														CI02ADVL	Tax	($124.75)	$0.00	($124.75)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$317.07
WEST, COURTNEY MARIE	WEST, COURTNEY MARIE		1406 DEBBIE ST		KANNAPOLIS, NC 28083	Proration	0051287422	JKY8784	PENDING	247609110	Refund Generated due to proration on Bill #0051287422-2021-2021-0000-00	Vehicle Sold	05/12/2022	C ADVL	Tax	($200.51)	$0.00	($200.51)
														CI04ADVL	Tax	($170.71)	$0.00	($170.71)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$371.22
YERRA, TARAKA NEELAKANTE SWARA RAO	YERRA, TARAKA NEELAKANTE SWARA RAO		10583 SKIPPING ROCK LN NW		CONCORD, NC 28027	Proration	0059512274	JAH9846	PENDING	247416396	Refund Generated due to proration on Bill #0059512274-2021-2021-0000-00	Vehicle Sold	05/09/2022	C ADVL	Tax	($182.97)	($9.15)	($192.12)
														CI02ADVL	Tax	($118.68)	($5.93)	($124.61)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$316.73
ZIGLAR, JAMES RONALD JR	ZIGLAR, JAMES RONALD JR		1136 LOLABRIDGE ST NW		CONCORD, NC 28027	Proration	0050504347	JDJ7495	PENDING	248130138	Refund Generated due to proration on Bill #0050504347-2021-2021-0000-00	Vehicle Sold	05/19/2022	C ADVL	Tax	($87.36)	$0.00	($87.36)
														CI02ADVL	Tax	($56.66)	$0.00	($56.66)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$144.02
																	Refund Total	$14338.77

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
New Business

SUBJECT:
County Manager - Adoption of the FY23 Budget

BRIEF SUMMARY:
The County Manager presented the Recommended Budget for Fiscal Year 2023 to the Board of Commissioners on Monday, May 16, 2022. A public hearing was held on Monday, June 6, 2022 at 6:30 p.m. The Cabarrus County Budget Ordinance consists of the General Fund, Community Investment Fund, Cabarrus Arena & Events Fund, Landfill Fund, 911 Emergency Telephone Fund, Health and Dental Insurance Fund, Workers Compensation and Liability Fund and Fire Tax Districts Fund, Social Services Fund and Intergovernmental Fund.

REQUESTED ACTION:
Motion to adopt the Budget Ordinance for FY23.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Mike Downs, 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 New Business item.

ATTACHMENTS:

- FY23 Budget Ordinance

Budget Ordinance

BE IT ORDAINED by the Board of Commissioners of Cabarrus County, North Carolina:

Section 1 – County Funds
The County hereby appropriates the following amounts, listed by fund, as the estimated revenues and expenditures for the operation and maintenance of various governmental activities, debt obligations and capital outlay purchases for the Fiscal Year beginning July 1, 2022, and ending June 30, 2023:

I. General Fund

a. It is estimated that the following revenues will be available in the General Fund:

Ad Valorem Tax Levy	$	226,563,987
Sales Tax/Other		42,293,000
Intergovernmental		25,147,250
Permits and Fees		9,931,343
Sales and Services		13,454,082
Investment Earnings		200,000
Miscellaneous		268,900
TOTAL REVENUES	**$**	**317,858,562**

b. The following expenditures are budgeted in the General Fund:

General Government	$	42,440,666
Public Safety		67,497,152
Economic and Physical Development		6,323,686
Human Services		52,705,105
Cultural and Recreational		7,715,516
Cabarrus County Schools		
Instructional Services		54,627,635
Charter Schools		5,711,860
Technology Support Services		7,104,667
Building and Grounds Maintenance		11,825,418
Other Schools (School Parks, Special Olympics)		134,405
Schools Information Technology Services (ITS)		36,324
Kannapolis City Schools		
Instructional Services		7,047,629
Charter Schools		586,050
Technology Support Services		528,078
Building Maintenance		1,042,348
Ground Maintenance		270,364
Schools Information Technology Services (ITS)		8,832
Rowan-Cabarrus Community College		
Current Expense		3,951,954
Other Programs		
Contributions to Other Funds		48,300,874
TOTAL EXPENDITURES	**$**	**317,858,562**

II. Community Investment Fund (CIF)

a. It is estimated the following revenues will be available in the Community Investment Fund:

Sales Tax	$	24,900,000
Miscellaneous		720,000
Lottery Proceeds		2,300,000
Other Financing Sources		44,591,176
TOTAL REVENUES	**$**	**72,511,176**

b. The following expenditures are budgeted in the Community Investment Fund:

Debt Service		
Public Schools		
Principal	$	28,881,688
Interest		9,899,077
Capital Outlay		1,120,000
Rowan Cabarrus Community College		
Principal		1,103,312
Interest		420,475
Capital Outlay		100,000
Other Debt Service		13,442,753
Other Improvements		6,616,995
Contribution to Capital Project Fund		10,871,176
Bank Service Charges		55,700
TOTAL EXPENDITURES	**$**	**72,511,176**

III. Cabarrus Arena and Events Center Fund

a. It is estimated the following revenues will be available in the Cabarrus Arena and Events Center Fund:

Sales and Service	$	749,831
Investment Earnings		15,000
Miscellaneous		5,000
Other Financing Sources		1,374,326
TOTAL REVENUES	**$**	**2,144,157**

The following expenditures are budgeted in the Cabarrus Arena and Events Center Fund:

Personnel Services	$	186,455
Operations		1,957,702
TOTAL EXPENDITURES	**$**	**2,144,157**

IV. Landfill Fund

a. It is estimated the following revenues will be available in the Landfill Fund:

Intergovernmental	$	63,000
Permits & Fees		150,000
Sales & Services		1,330,000
Contribution from General Fund		621,872
TOTAL REVENUES	**$**	**2,164,872**

b. The following expenditures are budgeted in the Landfill Fund:

Personnel Services	$	795,970
Operations		1,368,902
TOTAL EXPENDITURES	**$**	**2,164,872**

V. 911 Emergency Telephone Fund

a. It is estimated the following revenues will be available in the 911 Emergency Telephone Fund:

Intergovernmental	$	614,089
Investment Earnings		1,500
TOTAL REVENUES	**$**	**615,589**

b. The following expenditures are budgeted in the 911 Emergency Telephone Fund:

Operations	$	615,589
TOTAL EXPENDITURES	**$**	**615,589**

VI. Social Services Fund

a. It is estimated the following revenues will be available in the Social Services Fund:

Sales & Services	$	400,000
TOTAL REVENUES	**$**	**400,000**

b. The following expenditures are budgeted in the Social Services Fund:

Operations	$	400,000
TOTAL EXPENDITURES	**$**	**400,000**

VII. Intergovernmental Fund

a. It is estimated the following revenues will be available in the Intergovernmental Fund:

Sales & Services	$	2,080,000
TOTAL REVENUES	**$**	**2,080,000**

b. The following expenditures are budgeted in the Intergovernmental Fund:

Education	$	2,080,000
TOTAL EXPENDITURES	**$**	**2,080,000**

VIII. Health and Dental Insurance Fund

a. It is estimated the following revenues will be available in the Health and Dental Insurance Fund:

Sales & Services	$	16,518,063
Investment Earnings		5,000
Miscellaneous		1,122,014
Fund Balance		47,000
TOTAL REVENUES	**$**	**17,692,077**

b. The following expenditures are budgeted in the Health and Dental Insurance Fund:

Operations	$	17,692,077
TOTAL EXPENDITURES	**$**	**17,692,077**

IX. Workers Compensation and Liability Fund

a. It is estimated the following revenues will be available in the Workers Compensation and Liability Fund:

Sales & Services	$	2,841,330
Investment Earnings		6,000
Miscellaneous		20,000
Fund Balance		434,975
TOTAL REVENUES	**$**	**3,302,305**

b. The following expenditures are budgeted in the Workers Compensation and Liability Fund:

Operations	$	3,302,305
TOTAL EXPENDITURES	**$**	**3,302,305**

X. Fire Tax Districts Fund

a. It is estimated the following revenues will be available in the Fire Tax Districts Fund:

Ad Valorem Tax Levy	$	6,497,950
TOTAL REVENUES	**$**	**6,497,950**

b. The following expenditures are budgeted in the Fire Tax Districts Fund:

Allen Fire Tax District	$	553,419
Cold Water Fire Tax District		325,676
Concord Rural Fire Tax District		52,056
Flowe's Store Fire Tax District		278,497
Georgeville Fire Tax District		285,328
Gold Hill Fire Tax District		48,856
Harrisburg Rural Fire Tax District		1,315,017
Jackson Park (City of Concord) Fire Tax District		239,683
Kannapolis Rural Fire Tax District		226,884
Midland Fire Tax District		1,169,259
Mt. Mitchell Fire Tax District		106,824
Mt. Pleasant Rural Fire Tax District		594,278
Northeast Fire Tax District		199,952
Odell Fire Tax District		866,080
Richfield-Misenheimer Fire Tax District		11,230
Rimer Fire Tax District		224,911
TOTAL EXPENDITURES	**$**	**6,497,950**
GRAND TOTAL – ALL FUNDS – REVENUES	**$**	**425,266,688**
GRAND TOTAL – ALL FUNDS – EXPENDITURES	**$**	**425,266,688**

Section 2 – County Tax Rate

There is hereby levied a tax rate of **74 ¢** per one hundred dollars ($100) of assessed valuation of taxable property for the fiscal year beginning July 1, 2022, and ending June 30, 2023, to finance expenditures in Section 1, excluding the Fire Tax Districts. Estimated revenues based on the estimated total valuation of taxable property as listed on January 1, 2022, of $30,802,742,000, at an estimated combined collection rate of 98.5%. An estimated total valuation of Real, Personal and Public Service property is $28,131,750,000 and vehicle of $2,670,992,000.

Section 3 – Fire Tax Districts Tax Rates
There is also hereby levied the following tax rates on each one hundred dollars ($100) of assessed valuation of taxable property in the Fire Tax Districts for the fiscal year beginning July 1, 2022, and ending June 30, 2023:

Allen Fire Tax District	**9.0 ¢**
Based on estimated assessed valuation in the Allen Fire Tax District of $624,274,579	
Cold Water	**8.0 ¢**
Based on estimated assessed valuation in the Cold Water Fire Tax District of $413,294,321	
Concord Rural	**14.0 ¢**
Based on estimated assessed valuation in the Concord Rural Fire Tax District of $37,749,242	
Flowe's Store	**10.0 ¢**
Based on estimated assessed valuation in the Flowe's Store Fire Tax District of $282,737,885	
Georgeville	**9.20 ¢**
Based on estimated assessed valuation in the Georgeville Fire Tax District of $314,861,785	
Gold Hill	**9.0 ¢**
Based on estimated assessed valuation in the Gold Hill Fire Tax District of $55,110,956	
Harrisburg Rural	**15.0 ¢**
Based on estimated assessed valuation in the Harrisburg Fire Tax District of $890,028,176	
Jackson Park (City of Concord)	**14.0 ¢**
Based on estimated assessed valuation in the Jackson Park (City of Concord) Fire Tax District of $173,809,008	
Kannapolis Rural	**10.0 ¢**
Based on estimated assessed valuation in the Kannapolis Rural Fire Tax District of $230,339,235	
Midland	**10.0 ¢**
Based on estimated assessed valuation in the Midland Fire Tax District of $1,187,065,402	
Mt. Mitchell	**8.26 ¢**
Based on estimated assessed valuation in the Mt. Mitchell Fire Tax District of $131,296,606	
Mt. Pleasant Rural	**11.80 ¢**
Based on estimated assessed valuation in the Mt. Pleasant Rural Fire Tax District of $511,294,678	
Northeast	**12.70 ¢**
Based on estimated assessed valuation in the Northeast Fire Tax District of $159,840,115	
Odell	**6.80 ¢**
Based on estimated assessed valuation in the Odell Fire Tax District of $1,293,041,988	
Richfield-Misenheimer	**7.0 ¢**
Based on estimated assessed valuation in the Richfield-Misenheimer Fire Tax District of $16,287,550	
Rimer	**8.80 ¢**
Based on estimated assessed valuation in the Rimer Fire Tax District of $259,473,168	

The above tax rates produce Ad Valorem Tax Levy to finance the expenditures of the Fire Tax Districts. Estimated revenues based on the estimated total valuation of taxable property as listed on January 1, 2022, in the table above, at an estimated combined collection rate of 98.5%.

Section 4 – Authorized Positions
The Board authorizes **1,419** total positions equaling **1,354.11** full-time equivalents. This includes the following new positions authorized in FY23:

Department	# Positions	# FTE	Title	Grade
County Manager's Office	1	1	Process & Strategy Manager	26
County Manager's Office	3	3	Fellowship	10
Tax Administration	1	1	Assessment Associate	9
Information Technology	1	1	Network Engineer	26
Information Technology	1	1	Cyber Security Analyst	27
Infrastructure & Asset Management	1	1	Grounds Maintenance Mechanic	13
Sheriff's Office	4	4	Deputy Sheriff 12 Hr	14
Sheriff's Office	1	1	Captain	24
Jail	6	6	Detention Officer	13
Construction Standards	2	2	Code Enforcement Officer	17
Construction Standards	1	1	Permit Associate	12
Emergency Medical Services	3	3	EMT Basic Trainee	14
Emergency Medical Services	2	2	EMT Senior Paramedic12 Hr	15
Soil and Water Conservation	1	1	Resource Conservation Easement Specialist	15
Landfill Operations	1	1	Heavy Equipment Operator	10
Veteran Services	1	1	Veteran Services Officer	16
Human Services – Child Welfare	2	2	Social Work Supervisor III	21
Human Services – Child Welfare	1	1	Social Worker III	17
Human Services – Child Welfare	2	2	SW Invest/Assess & Treatment	18
Human Services–Economic Services	1	1	Income Maintenance Caseworker II	13
Human Services – Adult & Family	1	1	Social Worker II	15
Human Services – Adult & Family	1	1	Social Worker III	17
Library	1	1	Library Deputy Director	27
Total	39	39		

Section 5 – Authorizations

a. The foregoing appropriations, schedules of expected revenues, and taxes levied, are based on the annual budget as hereby approved, and the terms of which budget are hereby specifically incorporated by reference.

b. That there are hereby appropriated to the Fire Tax Districts the revenues from collection of the Fire Tax Districts Ad Valorem tax at the rates stated in Section 3 to cover the cost for servicing all districts.

c. The County Manager may not distribute funds appropriated to a private entity until the County and the private entity enter into a written contract or agreement specifying the following:

    1. The purposes for which the private entity may use the funds, which shall comply with the requirements of G.S. 153A-449(a) and N.C. Const. Art. V, Sec. 2.

    2. Requirements for accounting for the management and expenditure of county funds.

3. Any other fiscal or programmatic control deemed appropriate by the County Manager to ensure the lawful and appropriate spending and management of the county funds.

d. The County Manager, or his designee, may transfer moneys from one appropriation to another within the same fund. The County Manager must report such transfers to the Board of Commissioners at its next regular meeting and record such notice in the minutes.

e. The Board of Commissioners must approve the use of any contingency appropriation within any fund except for the County Manager may authorize expenditures from contingency appropriations to fund an increase in charter school student enrollment. Expenditures from contingency appropriations authorized by the County Manager must be reported to the board at its next regular meeting and recorded in the minutes.

f. The County Manager, Budget Director, or designee may create debt-financing amendments from estimated projections upon approval by the Board of Commissioners of the debt financing and adjust as needed upon closing.

g. The County Manager or designee may enter and execute change orders or amendments to construction contracts in amounts less than $90,000 when the appropriate annual budget or capital project ordinance contains sufficient appropriated but unencumbered funds.

h. The County Manager or designee may execute contracts not required to be bid or which G.S. 143-131 allows an informal bid so long as the annual budget or appropriate capital project ordinance contains sufficient appropriated but unencumbered funds for such purposes.

i. The County Manager or designee may execute contracts with outside agencies to properly document budgeted appropriations to such agencies where G.S. 153A-248(b), 259, 449 and any similar statutes require such contracts.

j. The County Manager or designee may reject formal bids when deemed appropriate and in the best interest of Cabarrus County pursuant to G.S. 143-129(a).

k. The appropriations for Cabarrus County Schools and Kannapolis City Schools are allocated by category. Cabarrus County Schools and Kannapolis City Schools must obtain the approval of the Board of Commissioners for any amendment that would increase or decrease the amount of County appropriations allocated by category by more than ten percent.

Budget Ordinance

Section 6.
This ordinance and the budget documents shall be the basis for the financial plan for the County of Cabarrus for the 2022-2023 fiscal year. The County Manager and the Finance Officer shall administer the budget. The Budget Director shall establish and maintain all records, which are in concurrence with this budget and budget ordinance and the appropriate statutes of the State of North Carolina.

Adopted this the 20th day of June 2022.

_____
Stephen M. Morris, Chairman

_____
Lauren Linker, Clerk to the Board

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
New Business

SUBJECT:
Finance - Budget Amendment for Debt Refunding of Limited Obligations Bonds - 2022A

BRIEF SUMMARY:
The County's underwriter, Piper Sandler & Co., has advised, given appropriate market conditions, to refund all or a portion of 2020A Limited Obligation Bonds.

The Public Hearing was held March 21, 2022. The bonds were sold May 18, 2022.

The budget amendment is needed to properly budget the refunding.

REQUESTED ACTION:
Motion to adopt the budget amendment.

EXPECTED LENGTH OF PRESENTATION:
1 Minute

SUBMITTED BY:
Wendi Heglar, Finance Director

BUDGET AMENDMENT REQUIRED:
Yes

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Budget Amendment

Budget Revision/Amendment Request

Date: 6/20/2022 **Amount:** 106,620,725.00

Dept. Head: Wendi Heglar **Department:** Finance - Community Investment Fund

☐ **Internal Transfer Within Department** ☐ **Transfer Between Departments/Funds** ☑ **Supplemental Request**

This budget amendment budgets the 2022A bonds revenue and expenditures.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
100	6	9120 6918	Preoceeds fro Limited Obligation Bonds	-	96,825,000	-	96,825,000
100	6	9120 6707	Premium on Debt Issued	-	9,795,725	-	9,795,725
100	9	9120 9742	Payment to Escrow Agent	-	105,672,677	-	105,672,677
100	9	9120 9609	Cost of Issuance	-	948,048		

Budget Officer

☐ Approved

☐ Denied

_____

Signature

_____

Date

County Manager

☐ Approved

☐ Denied

_____

Sianature

_____

Date

Board of Commissioners

☐ Approved

☐ Denied

_____

Signature

_____

Date

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
New Business

SUBJECT:
Infrastructure and Asset Management - Purchase of Courtroom Pews

BRIEF SUMMARY:
Infrastructure and Asset Management is requesting approval to purchase courtroom pews for seating in all of the courtrooms in the new Courthouse.

Request includes:

Sauder Courtroom Furniture - 2124 linear feet of Cherry Pews matched to the millwork statin used in the courtrooms currently under construction.

Total cost for all pews (materials, delivery installation) is $307,375.51 with tax.

These pews will be purchased from sole source vendor.

Per NCGS 143-129(e)(6) local government units are exempt from the competitive bidding requirements when a certain condition is applicable. In this case the applicable condition is, that standardization or compatibility is the overriding consideration.

REQUESTED ACTION:
Motion to approve these sole source exception purchase and authorize the County Manager to execute the purchase order between Cabarrus County and Sauder Courtroom Furniture per review of the procurement manager.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Kyle Bilafer, Area Manager of Operations

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Proposal

SAUDER
COURTROOM FURNITURE

P.O. Box 230
930 W. Barre Road
Archbold, Ohio 43502

Phone: 419-445-7670
Fax: 419-446-3173
800-537-1530

QUOTATION 91378

Net Price Quote For:
Cabarrus County Courthouse
61 Union St.
Concord, NC 28025

Cust # 500077 Catalog 22V2 Zone 2

Date Created: 5/18/22
Project: COURTROOMS
Required Date: 11/30/22

Ship To: Cabarrus County Courthouse
61 Union St.
Concord, NC 28025

Sales Rep: SHAWN BEAL
252-459-5919
SBEAL@SAUDERWORSHIP.COM

Contact:

Line	Qty	Description	Net Each	Total
1	1	3014016 PEW,16,VENEER CONT SEAT, BACK tag: PEW BODY: 3014016 129 PEWS @ 2124. FEET WOOD TYPE IS CHERRY FINISH # 90 LIGHT MATCH BACK PITCH IS 5 INCHES SUPPORT STYLE 13 OVAL BACK CAP PLYWOOD CORE MATERIAL # 2200 LEFT END WITH 00 EM LEFT CANT: 009.0 # 2200 RIGHT END WITH 00 EM RIGHT CANT: 009.0 FLOOR GRADE LEVEL FLOOR IS CONCRETE FLOOR SLOPE 0.000	$248,495.31	$248,495.31
2	1	PEW-FINISH-CHG PEW FINISH MATCH CHARGE tag:	$297.01	$297.01

3	1	DELIVERY DELIVERY OF PRODUCT tag: NC North Carolina PEW Straight Pews SMC Smc Delivery TOTAL LF 2124.000
4	1	ASM-INSTALL INSTALLATION OF PRODUCT tag: NC North Carolina SMC Non-Union Installation By Smc 3014016 Pew, Contour Seat and Back, Veneer TOTAL LF PEWS 2124.000 TOTAL-SPLICES 208.0

Subtotal:	$316,849.72
Pew Volume Discount:	-$29,582.92
Tax:	$20,108.71
Total*:	**$307,375.51**
Deposit 30%(if applicable):	**$92,212.65**
Balance due at invoice:	**$215,162.86**

Deposit of 30% of total quote price may be due at time of order receipt. Remaining balance due at Net 30 payment terms from date of invoice.

This order may be subject to a price increase if delivery is not taken from 14 months of receipt of signed order contract, receipt of subcontract, and/or receipt of signed purchase order.

Payment terms are net 30 days from invoice date with an established credit limit. Open terms may be established based on Sauder® Manufacturing Co. determination of available funds to pay for the order in full and within payment terms. If there is a high risk determination then a 100% deposit may be required. Acceptance of the order is expressly conditioned upon Purchaser agreeing to Sauder® Manufacturing Co. terms and conditions, which can be found at www.sauderworship.com, unless otherwise agreed to in a writing signed by all applicable parties. The parties agree to include SMC Addendum terms, if any and this order if a subcontract or MSA is involved. Sauder® Manufacturing Co. includes Sauder Courtroom Furniture and any affiliate, predecessor or successor entities.

Acceptance of these terms shall be evidenced by Signature's and/or Sauder® Manufacturing Co. commencing work on this project.

Ordered By: _____ Date: _____
(Authorized Signature)

Printed Name and Title: _____

Sauder Representative: Shawn Beal

Sauder Delivery Time: Please contact your local Sauder Sales Consultant for approximate lead time for delivery after completion of all the details on the project.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

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.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
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	n/a	*
Adult Care Home Community Advisory Committee	12	**
Agricultural 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	n/a	*
Harrisburg Planning & Zoning Board and Board of Adjustment (ETJ)	1	*
Home & Community Care Block Grant Committee	1	*
Human Services Advisory Board	n/a	*
Industrial Facilities & Pollution Control Financing Authority	1	*

Jury Commission	n/a	*
Juvenile Crime Prevention Council	3	*
Library Board of Trustees	2	*
Mental Health Advisory Board	1	*
Mt. Pleasant Planning Board & Board of Adjustment	n/a	
Nursing Home Community Advisory Board	9	**
Planning & Zoning Commission	4	*
Public Health Authority of Cabarrus County	n/a	*
Region F Aging Advisory Committee	3	*
Rowan-Cabarrus Community College Board of Trustees	n/a	*
Senior Centers Advisory Council	n/a	*
Tourism Authority	n/a	*
Transportation Advisory Board	8	*
Water & Sewer Authority of Cabarrus County	n/a	*
Youth Commission	19	A.L. Brown, Central Cabarrus, Concord, Cox Mill, Hickory Ridge, Mt. Pleasant, Jay M. Robinson, NW Cabarrus, West Cabarrus, & 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.

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*.

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.

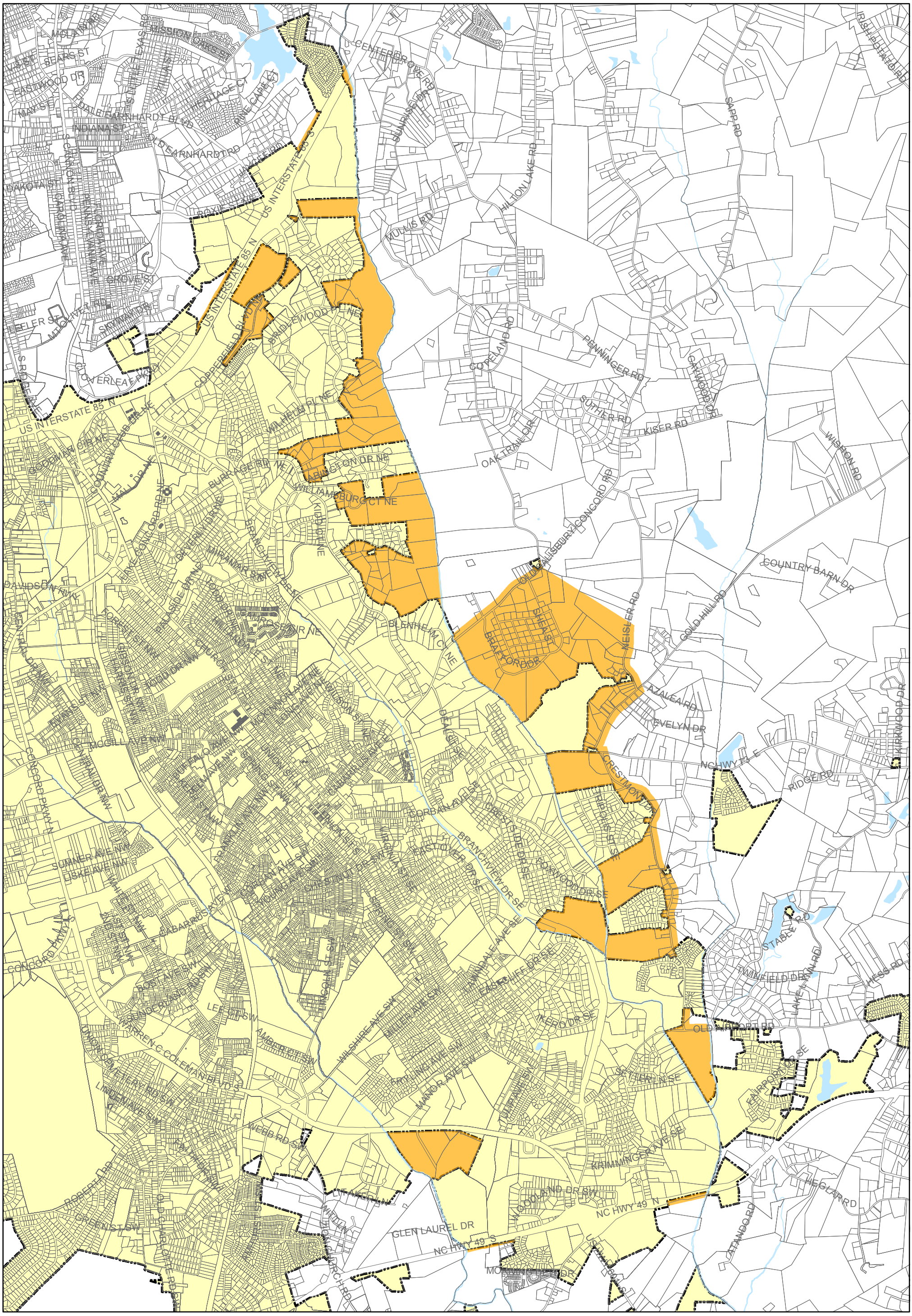
WATER & SEWER AUTHORITY OF CABARRUS COUNTY

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.



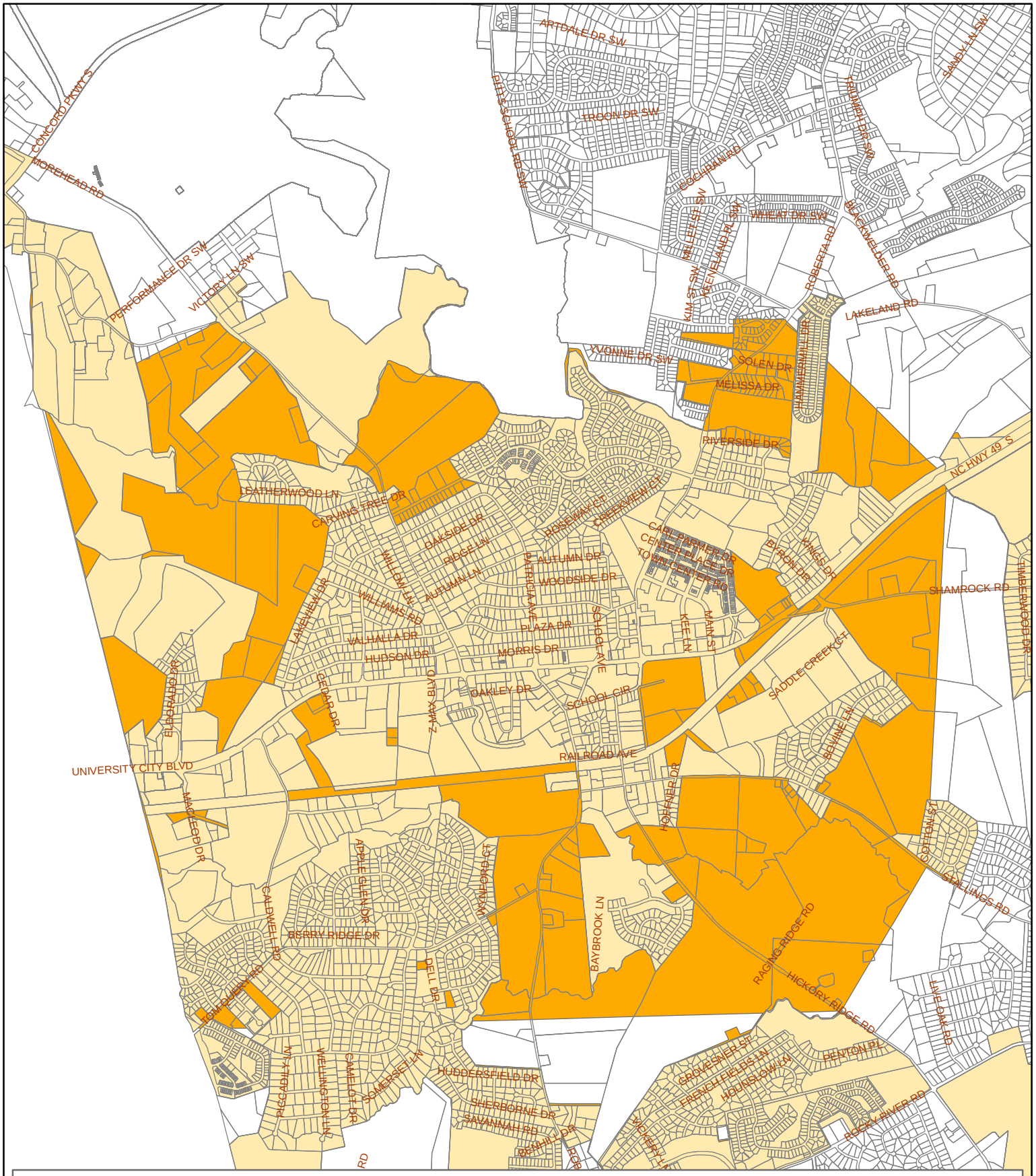
City of Concord
Extraterritorial Jurisdiction (ETJ)

ETJ
City of Concord
Parcels
Rivers
Lakes & Ponds

N
W E
S

0 0.25 0.5
Miles

Map created: 6-3-2009



Legend

- Tax Parcels
- Harrisburg Municipal Limits
- Harrisburg ETJ Boundary

0 0.2 0.4 0.8 Miles

CabarrusCounty
The Center of American Motorsports
NORTH CAROLINA

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._____

xxxxxxxxxxxxxxx

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

BOC 001 (Revised 07/06)

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?

_____

_____

_____

_____

_____

_____

_____

10/2012

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

10/2012

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Reports

SUBJECT:
Budget - Monthly Budget Amendment Report

BRIEF SUMMARY:
The County Manager requested monthly report of Budget Amendments. This report shows all transfers of money from one appropriation to another in accordance with the Budget Ordinance for FY 2021-2022.

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.

ATTACHMENTS:

- Report

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110002	BUA	05/02/2022	05/02/2022	auto/truck	alroberts	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192410	9661		2410	auto/truck		Building Inspection Reserve		6,000.00	
2	00192410	9520		2410	auto/truck		Autos & Trucks Maintenance	6,000.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110010	BUA	05/02/2022	05/02/2022	Navigator	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9109		1910	Navigator		Navigator fees Salary Adjustments		500.00	
2	00191210	9445		1910	Navigator		Navigator fees Purchased Services	500.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110023	BUA	05/03/2022	05/03/2022	Fuel	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9346		3280	Fuel		Fuel Adjustment Fuel		1,500.00	
2	00193280	9346		3280	Fuel		Fuel Adjustment Fuel	1,500.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110139	BUA	05/05/2022	05/05/2022	Fuel	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110139	BUA	05/05/2022	05/05/2022	Fuel	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192715	9346		1910	Fuel		Fuel Adjustment Fuel	2,350.00		
2	00191210	9346		1910	Fuel		Fuel Adjustment Fuel	154.00		
3	00191953	9346		1910	Fuel		Fuel Adjustment Fuel	501.00		
4	00192710	9346		1910	Fuel		Fuel Adjustment Fuel	50.00		
5	00198240	9346		1910	Fuel		Fuel Adjustment Fuel	254.00		
6	00191910	9346		1910	Fuel		Fuel Adjustment Fuel		3,309.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110197	BUA	05/06/2022	05/06/2022	JAG Grant	blconrad	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9361	JAG	2110	JAG Grant	T	PO 2022387 for JAG Grant Office of Justice Program Gran	3,530.00		
2	00192110	9316		2110	JAG Grant	T	PO 2022387 for JAG Grant Supplies		3,530.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110198	BUA	05/06/2022	05/06/2022	Repairs	lcruse	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00193250	9493	HHI	3250	Repairs		Reallocate to projected co Operations-HHI		4,606.00	
2	00193250	9493	HHIHR	3250	Repairs		Projected costs Operations	4,606.00		
							** JOURNAL TOTAL	0.00	0.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110199	BUA	05/06/2022	05/06/2022	CCOG Fees	mnxiong	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195240	9342		5240	9435		For CCOG Fees Minor Technology Equipment		400.00	
2	00195240	9435		5240	9435		For CCOG Fees COG/MIS Fees	400.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110541	BUA	05/09/2022	05/09/2022	Engineerinkpgrant		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094610	9830	2203	4610	Engineerin		Landfill Expansion Feasibi Other Improvements		17,705.00	
2	27094610	9606		4610	Engineerin		Landfill Expansion Feasibi Engineers	17,705.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110646	BUA	05/10/2022	05/10/2022	YE Spendinblconrad		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9320		2110	YE Spendin	T	year end spending Printing & Binding	381.00		
2	00192110	9321		2110	YE Spendin	T	year end spending Imaging expense	4,133.00		
3	00192110	9331		2110	YE Spendin	T	year end spending Minor Office Equipment & Furn	59,000.00		
4	00192110	9393		2110	YE Spendin	T	year end spending Recruitment	1,323.00		
5	00192110	9301		2110	YE Spendin	T	year end spending Office Supplies		5,000.00	
6	00192110	9310		2110	YE Spendin	T	year end spending Ammunition		9,907.00	
7	00192110	9317		2110	YE Spendin	T	year end spending K-9 Squad		2,030.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110646	BUA	05/10/2022	05/10/2022	YE Spendinblconrad		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
8	00192110	9340		2110	YE Spendin	T	year end spending		15,000.00	
							Uniforms			
9	00192110	9441		2110	YE Spendin	T	year end spending		10,000.00	
							DARE Program Expense			
10	00192110	9445		2110	YE Spendin	T	year end spending		10,000.00	
							Purchased Services			
11	00192110	9560		2110	YE Spendin	T	year end spending		8,000.00	
							Minor Equipment Maintenance			
12	00192110	9575		2110	YE Spendin	T	year end spending		4,000.00	
							Carwashes			
13	00192110	9713		2110	YE Spendin	T	year end spending		900.00	
							JCPC			
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110689	BUA	05/11/2022	05/11/2022	Esmnt Servtremsburg		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	46093270	9698		3270	Esmnt Serv		moving money to Purchased		30,000.00	
							Soil & Water District Activiti			
2	46093270	9445		3270	Esmnt Serv		receiving for survey	30,000.00		
							Purchased Services			
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110697	BUA	05/11/2022	05/11/2022	LunchPlus	mnxiong	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195750	9335		5750	9335		For Lunch Plus	75,000.00		
							Food			
2	00195760	9444		5750	9335		For Lunch Plus		24,000.00	
							Adult Day Services			
3	00195760	9445		5750	9335		For Lunch Plus		30,000.00	
							Purchased Services			

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110697	BUA	05/11/2022	05/11/2022	LunchPlus	mnxiong	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
4	00195240	9520		5750	9335		For Lunch Plus Autos & Trucks Maintenance		21,000.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110706	BUA	05/11/2022	05/11/2022	Grind	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094610	9540		4610	Grind		Yard Waste Grinding Heavy Equipment Maintenance		5,000.00	
2	27094610	9560		4610	Grind		Yard Waste Grinding Minor Equipment Maintenance		5,000.00	
3	27094610	9445	MULCH	4610	Grind		Yard Waste Grinding Purchased Services	10,000.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110746	BUA	05/12/2022	05/12/2022	YE Spendin	blconrad	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192130	9305		2130	YE Spendin	T	JAIL: to cover YE Spendin Linen supplies	313.00		
2	00192130	9331		2130	YE Spendin	T	JAIL: to cover YE Spendin Minor Office Equipment & Furn	3,371.00		
3	00192130	9394		2130	YE Spendin	T	JAIL: to cover YE Spendin Janitorial Supplies	357.00		
4	00192130	9610		2130	YE Spendin	T	JAIL: to cover YE Spendin Travel and Education	618.00		
5	00192130	9420		2130	YE Spendin	T	JAIL: to cover YE Spendin Cell Phones	720.00		
6	00192130	9363		2130	YE Spendin	T	JAIL: to cover YE Spendin Personal Care Supplies		5,379.00	
							** JOURNAL TOTAL	0.00	0.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110747	BUA	05/12/2022	05/12/2022	Racks	mjtardugno	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191940	9605		1940	Racks		Pallet Racks Consultants		3,623.92	
2	00191940	9330		1940	Racks		Pallet Racks Tools & Minor Equip Prop Maint	3,623.92		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110751	BUA	05/13/2022	05/13/2022	4H correct	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00165410	6606	4H	5410	4H correct		4H to 4HCAN Program Fees-4H	25,000.00		
2	00165410	6606	4HCAN	5410	4H correct		4H to 4HCAN Program Fees		25,000.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110755	BUA	05/13/2022	05/13/2022	Supplies	mamiller	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191955	9316		9316	9316	T	Supplies	3,000.00		
2	00191955	9860		9316	9316	T	Equipment & Furniture		3,000.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110757	BUA	05/16/2022	05/16/2022	H&S	lcruse	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110757	BUA	05/16/2022	05/16/2022	H&S	lcruse	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00193250	9493	DECHS	3250	H&S		Transfer to over-expended DEC Health & Safety		998.00	
2	00193250	9493	DECHV	3250	H&S		Transfer to cover expenses DEC HVAC	998.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110762	BUA	05/16/2022	05/16/2022	Fuel	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191952	9346		1910	Fuel		Fuel Adjustment Fuel	4,000.00		
2	00191953	9346		1910	Fuel		Fuel Adjustment Fuel	3,500.00		
3	00191955	9346		1910	Fuel		Fuel Adjustment Fuel	2,000.00		
4	00191910	9346		1910	Fuel		Fuel Adjustment Fuel		9,500.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110777	BUA	05/16/2022	05/16/2022	SR/SVR/MOT	blconrad	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9331		2110	SR/SVR/MOT	T	SVRT & MOTOR Trailers Minor Office Equipment & Furn	5,700.00		
2	00192110	9316		2110	SR/SVR/MOT	T	SVRT & MOTOR Trailers Supplies		5,700.00	
							** JOURNAL TOTAL	0.00	0.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110821	BUA	05/16/2022	05/16/2022	LunchPlus	mnxiong	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00165760	6301		5750	9335		For Lunch Plus HCCBG - Adult Day Services	24,000.00		
2	00165760	6215		5750	9335		For Lunch Plus HCCBG/In Home Aide - CBG	30,000.00		
3	00165240	6223	HCCBG	5750	9335		For Lunch Plus Transportation Grant	21,000.00		
4	00165750	6224		5750	9335		For Lunch Plus Congregate Nutrition Grant		75,000.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110822	BUA	05/17/2022	05/17/2022	F-16	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00161910	6901		BOC	F-16		Purchase explosive ordinan Fund Balance Appropriated		305,000.00	
2	00162110	6386	BOMB	BOC	F-16		Purchase explosive ordinan Homeland Security		50,000.00	
3	00192110	9860	BOMB	BOC	F-16		Purchase explosive ordinan Equipment & Furniture	355,000.00		
4	001	5704		BOC	F-16		Appropriations		355,000.00	1
5	001	5703		BOC	F-16		Estimated Revenues	355,000.00		1
							** JOURNAL TOTAL	355,000.00	355,000.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110833	BUA	05/17/2022	05/17/2022	Tools	lcruse	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00193250	9493	LIHP	3250	Tools		Contractor cost Operations		4,100.00	
2	00193250	9301	LIHP	3250	Tools		Lihp office supplies Office Supplies	100.00		

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110833	BUA	05/17/2022	05/17/2022	Tools	lcruse	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
3	00193250	9330	LIHP	3250	Tools		Energy Auditor tools Tools & Minor Equipment	4,000.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110836	BUA	05/17/2022	05/17/2022	OFFICESUPP	srburgess	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191953	9501		FACSER	FACSERVICE	T	TFR FUNDS TO OFFICE SUPPLI Buildings & Grounds Maintenanc		200.00	
2	00191953	9301		FACSER	FACSERVICE	T	TFR FUNDS TO OFFICE SUPPLI Office Supplies	200.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110898	BUA	05/17/2022	05/17/2022	F-14	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00168240	6805		BOC	F-14		Allocate donation Cont and Private Donations		3,000.00	
2	00198240	9331		BOC	F-14		Allocate donation Minor Office Equipment & Furn	3,000.00		
3	001	5704		BOC	F-14		 Appropriations		3,000.00	1
4	001	5703		BOC	F-14		 Estimated Revenues	3,000.00		1
							** JOURNAL TOTAL	3,000.00	3,000.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110900	BUA	05/17/2022	05/17/2022	F-8	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110900	BUA	05/17/2022	05/17/2022	F-8	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00161910	6445		BOC	F-8		increase Health insurance Medicaid Hold Harmless		2,000,000.00	
2	00191960	9734		BOC	F-8		increase Health insurance Cont to Internal Service Fund	2,000,000.00		
3	61061917	6902		BOC	F-8		increase Health insurance Contribution From General Fund		2,000,000.00	
4	61061917	6901		BOC	F-8		increase Health insurance Fund Balance Appropriated		1,218,350.00	
5	61091917	9360		BOC	F-8		increase Health insurance Medical Supplies	30,000.00		
6	61091917	9401		BOC	F-8		increase Health insurance Building and Equipment Rentals	50.00		
7	61091917	9445		BOC	F-8		increase Health insurance Purchased Services	5,000.00		
8	61091917	9485		BOC	F-8		increase Health insurance Administration Fees	25,000.00		
9	61091917	9570		BOC	F-8		increase Health insurance Service Contracts		5,500.00	
10	61091917	9645		BOC	F-8		increase Health insurance Self-Insured Hospital Claims	3,160,600.00		
11	61091917	9647		BOC	F-8		increase Health insurance Wellness Program	3,200.00		
12	001	5704		BOC	F-8		Appropriations		2,000,000.00	1
13	610	5704		BOC	F-8		Appropriations		3,218,350.00	1
14	001	5703		BOC	F-8		Estimated Revenues	2,000,000.00		1
15	610	5703		BOC	F-8		Estimated Revenues	3,218,350.00		1
							** JOURNAL TOTAL	5,218,350.00	5,218,350.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110901	BUA	05/17/2022	05/17/2022	F-5	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195240	9346		BOC	F-5		CRRSA 5310 Grant Fuel	35,018.00		

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110901	BUA	05/17/2022	05/17/2022	F-5	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION	DEBIT	CREDIT	OB
							ACCOUNT DESCRIPTION			
2	00165240	6384	CARES	BOC	F-5		CRRSA 5310 Grant		35,018.00	
							Cares Act Relief Payment			
3	001	5704		BOC	F-5				35,018.00	1
							Appropriations			
4	001	5703		BOC	F-5			35,018.00		1
							Estimated Revenues			
							** JOURNAL TOTAL	35,018.00	35,018.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110912	BUA	05/17/2022	05/17/2022	F-4	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION	DEBIT	CREDIT	OB
							ACCOUNT DESCRIPTION			
1	00161910	6445		BOC	F-4		Medical hold harmless		2,396,850.00	
							Medicaid Hold Harmless			
2	00191510	9860		BOC	F-4		Medical hold harmless	65,770.00		
							Equipment & Furniture			
3	00191810	9860		BOC	F-4		Medical hold harmless	385,900.00		
							Equipment & Furniture			
4	00191955	9863		BOC	F-4		Medical hold harmless	454,000.00		
							Motor Vehicles			
5	00192710	9860		BOC	F-4		Medical hold harmless	90,000.00		
							Equipment & Furniture			
6	38092730	9820	EMSHQ	BOC	F-4		Medical hold harmless	419,080.00		
							Construction			
7	00192110	9860		BOC	F-4		Medical hold harmless	405,000.00		
							Equipment & Furniture			
8	00192110	9863		BOC	F-4		Medical hold harmless	577,100.00		
							Motor Vehicles			
9	38062730	6902	EMSHQ	BOC	F-4		Medical hold harmless		419,080.00	
							Contribution From General Fund			
10	00191960	9708		BOC	F-4		Medical hold harmless	419,080.00		
							Cont to Capital Project Fund			
11	001	5704		BOC	F-4				2,396,850.00	1
							Appropriations			
12	380	5704		BOC	F-4				419,080.00	1
							Appropriations			
13	001	5703		BOC	F-4			2,396,850.00		1
							Estimated Revenues			

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110912	BUA	05/17/2022	05/17/2022	F-4	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
14	380	5703		BOC	F-4		Estimated Revenues	419,080.00		1
							** JOURNAL TOTAL	2,815,930.00	2,815,930.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110913	BUA	05/17/2022	05/17/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	37060000	6701		BOC	F-11		close out the projects Interest on Investments		99.00	
2	37097505	9825		BOC	F-11		close out the projects Contra Sales Tax		171,129.00	
3	37097339	9830		BOC	F-11		close out the projects Other Improvements		1,093.00	
4	37097345	9606		BOC	F-11		close out the projects Engineers		4,059.00	
5	37097345	9726		BOC	F-11		close out the projects Cabarrus County Sch-Start Up		1,390.00	
6	37097345	9801		BOC	F-11		close out the projects Land Acquisition		259.00	
7	37097345	9803		BOC	F-11		close out the projects Utility Extensions		8,845.00	
8	37097345	9820		BOC	F-11		close out the projects Construction		1,758.00	
9	37097345	9820	0599	BOC	F-11		close out the projects Construction		704.00	
10	37097345	9825		BOC	F-11		close out the projects Contra Sales Tax		781.00	
11	37097345	9860		BOC	F-11		close out the projects Equipment & Furniture		4,011.00	
12	37097345	9862		BOC	F-11		close out the projects Technology		45,962.00	
13	37097345	9864		BOC	F-11		close out the projects Technology Infrastructure		12,524.00	
14	37090000	970118		BOC	F-11		close out the projects Cont to Comm Investment Fund	252,614.00		
15	36960000	6701		BOC	F-11		close out the projects Interest on Investments		1,124.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110913	BUA	05/17/2022	05/17/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
16	36967344	6439		BOC	F-11		close out the projects NC Dept of Transportation		1,538,966.00	
17	36997344	9485		BOC	F-11		close out the projects Administration Fees		31,124.00	
18	36997344	9606		BOC	F-11		close out the projects Engineers		62,148.00	
19	36997344	9607		BOC	F-11		close out the projects Architects		15,000.00	
20	36997344	9802		BOC	F-11		close out the projects Road Construction Projects		1,386.00	
21	36997344	9820		BOC	F-11		close out the projects Construction	6,706.00		
22	36997344	9820	0599	BOC	F-11		close out the projects Construction		7,998.00	
23	36997344	9825		BOC	F-11		close out the projects Contra Sales Tax		828,866.00	
24	36997344	9860		BOC	F-11		close out the projects Equipment & Furniture		150.00	
25	36997344	9862		BOC	F-11		close out the projects Technology		431.00	
26	36997344	9864		BOC	F-11		close out the projects Technology Infrastructure		15,657.00	
27	36990000	970118		BOC	F-11		close out the projects Cont to Comm Investment Fund	2,496,144.00		
28	10069120	6910	2018	BOC	F-11		close out the projects Cont From Capital Projects Fd		2,748,758.00	
29	10090000	9830	AVAIL	BOC	F-11		close out the projects Other Improvements	2,748,758.00		
30	100	5704		BOC	F-11		Appropriations		2,748,758.00	1
31	369	5704		BOC	F-11		Appropriations		1,540,090.00	1
32	370	5704		BOC	F-11		Appropriations	252,515.00		1
33	100	5703		BOC	F-11		Estimated Revenues	2,748,758.00		1
34	369	5703		BOC	F-11		Estimated Revenues	1,124.00		1
35	370	5703		BOC	F-11		Estimated Revenues	99.00		1
36	369	5707		BOC	F-11		Budgetary FB - Unreserved	1,538,966.00		1

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110913	BUA	05/17/2022	05/17/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
37	370	5707		BOC	F-11		Budgetary FB - Unreserved		252,614.00	1
38	370	5704		BOC	F-11		Appropriations		252,614.00	1
39	369	5703		BOC	F-11		Estimated Revenues	1,538,966.00		1
40	370	5707		BOC	F-11		Budgetary FB - Unreserved	252,614.00		1
41	369	5707		BOC	F-11		Budgetary FB - Unreserved		1,538,966.00	1
							** JOURNAL TOTAL	6,333,042.00	6,333,042.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110931	BUA	05/18/2022	05/18/2022	year end	trligon	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192730	942001		2730	2730	T	Telecommunications		1,100.00	
2	00192730	9301		2730	2730	T	Office Supplies	1,100.00		
3	00192730	9752		2730	2730	T	First Responder		7,000.00	
4	00192730	9520		2730	2730	T	Autos & Trucks Maintenance	7,000.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110932	BUA	05/18/2022	05/18/2022	Tech purchkfsifford		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192410	9661		2410	2410		Building Inspection Reserve		7,000.00	
2	00192410	9862		2410	2410		Technology	7,000.00		
							** JOURNAL TOTAL	0.00	0.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110934	BUA	05/18/2022	05/18/2022	Engineer	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094610	9405		4610	Engineer		Engineering Study Permitting Fees		2,000.00	
2	27094610	9540		4610	Engineer		Engineering Study Heavy Equipment Maintenance		4,409.00	
3	27094610	9520		4610	Engineer		Engineering Study Autos & Trucks Maintenance		2,000.00	
4	27094610	9606		4610	Engineer		Engineering Study Engineers	8,409.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110935	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	38092210	9821	COURT	BOC	F-11		Multiple projects Building and Renovations		7,500,000.00	
2	38062210	6918	2022A	BOC	F-11		Multiple projects Proceeds from COPS/LOBS	7,500,000.00		
3	38092210	9860	COURT	BOC	F-11		Multiple projects Equipment & Furniture	34,000.00		
4	38092210	9660	COURT	BOC	F-11		Multiple projects Contingency	616,000.00		
5	38092210	9330	COURT	BOC	F-11		Multiple projects Tools & Minor Equipment	300,000.00		
6	38092210	9607	COURT	BOC	F-11		Multiple projects Architects	150,000.00		
7	38068140	6902	BARN	BOC	F-11		Multiple projects Contribution From General Fund		1,100,000.00	
8	38098140	9820	BARN	BOC	F-11		Multiple projects Construction	900,000.00		
9	38068140	6902	BARN	BOC	F-11		Multiple projects Contribution From General Fund		200,000.00	
10	38068140	6375	BARN	BOC	F-11		Multiple projects State Budget Allociation		700,000.00	
11	38098140	9830	ADA	BOC	F-11		Multiple projects Other Improvements	200,000.00		
12	38068140	6902	ADA	BOC	F-11		Multiple projects Contribution From General Fund		200,000.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110935	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
13	38098140	9830	RWP	BOC	F-11		Multiple projects Other Improvements	100,000.00		
14	38068140	6932	RWP	BOC	F-11		Multiple projects Cont from Comm Investment Fund		100,000.00	
15	380	5704		BOC	F-11		Appropriations	5,200,000.00		1
16	380	5703		BOC	F-11		Estimated Revenues		6,100,000.00	1
17	380	5707		BOC	F-11		Budgetary FB - Unreserved	900,000.00		1
18	380	5703		BOC	F-11		Estimated Revenues	900,000.00		1
19	380	5707		BOC	F-11		Budgetary FB - Unreserved		900,000.00	1
							** JOURNAL TOTAL	7,000,000.00	7,000,000.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110936	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	53468240	6701		BOC	F-11		close accounts Fund 534 Interest on Investments	1,276.00		
2	53498240	9302	MIDLB	BOC	F-11		close accounts Fund 534 Circulation stock		3,131.00	
3	53498240	9607		BOC	F-11		close accounts Fund 534 Architects		4,920.00	
4	53498240	9704		BOC	F-11		close accounts Fund 534 Contribution to General Fund	6,775.00		
5	534	5704		BOC	F-11		Appropriations	1,276.00		1
6	534	5703		BOC	F-11		Estimated Revenues		1,276.00	1
							** JOURNAL TOTAL	1,276.00	1,276.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110941	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	46060000	6023		BOC	F-11		small projects fund Deferred Tax Collections		1,201,382.00	
2	46060000	602301		BOC	F-11		small projects fund Deferred Tax Coll-Prior Years		23,268.00	
3	46060000	6024		BOC	F-11		small projects fund Deferred Tax Interest		173,915.00	
4	46060000	661401		BOC	F-11		small projects fund Lease of Land Revenue		7,500.00	
5	46060000	6701		BOC	F-11		small projects fund Interest on Investments		1,895.00	
6	46090000	9830		BOC	F-11		small projects fund Other Improvements	1,407,960.00		
7	46061610	6701		BOC	F-11		small projects fund Interest on Investments		1,012.00	
8	46061610	6501	0258	BOC	F-11		small projects fund Register of Deeds Fees		163,976.00	
9	46091610	9407		BOC	F-11		small projects fund Automation & Enhancement Pres	164,988.00		
10	46063270	6606	DRILL	BOC	F-11		small projects fund Program Fees		1,290.00	
11	46093270	9419	DRILL	BOC	F-11		small projects fund Repairs and Maintenance	1,290.00		
12	460	5704		BOC	F-11		Appropriations		1,574,238.00	1
13	460	5703		BOC	F-11		Estimated Revenues	1,566,738.00		1
14	460	5707		BOC	F-11		Budgetary FB - Unreserved	7,500.00		1
15	460	5703		BOC	F-11		Estimated Revenues	7,500.00		1
16	460	5707		BOC	F-11		Budgetary FB - Unreserved		7,500.00	1
							** JOURNAL TOTAL	1,581,738.00	1,581,738.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110942	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110942	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	46162111	6305	TREAS	BOC	F-11		Sheriff Project Fund Federal Forfeiture Sharing		22,491.00	
2	46162111	6701		BOC	F-11		Sheriff Project Fund Interest on Investments		73.00	
3	46162111	6701	TREAS	BOC	F-11		Sheriff Project Fund Interest on Investments		73.00	
4	46162112	6306		BOC	F-11		Sheriff Project Fund NC Substance Control Tax		22,355.00	
5	46162112	6701		BOC	F-11		Sheriff Project Fund Interest on Investments		148.00	
6	46162114	6694		BOC	F-11		Sheriff Project Fund Firing Range Revenues		794.00	
7	46162114	6701		BOC	F-11		Sheriff Project Fund Interest on Investments		9.00	
8	46192111	9836	TREAS	BOC	F-11		Sheriff Project Fund Forfeiture Sharing Expenses	22,637.00		
9	46192112	9838		BOC	F-11		Sheriff Project Fund NC Control Substance Tax Expen	22,503.00		
10	46192114	9572		BOC	F-11		Sheriff Project Fund Range Maintenance/Repair	803.00		
11	461	5704		BOC	F-11		Appropriations		45,943.00	1
12	461	5703		BOC	F-11		Estimated Revenues	45,943.00		1
							** JOURNAL TOTAL	45,943.00	45,943.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110943	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	34390000	9830	AVAIL	BOC	F-11		close out remain projects Other Improvements		90,386.00	
2	34391810	9605	WEB	BOC	F-11		close out remain projects Consultants		250.00	
3	34391810	9830		BOC	F-11		close out remain projects Other Improvements		78.00	
4	34392110	9342	CAM	BOC	F-11		close out remain projects Minor Technology Equipment		552.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110943	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
5	34392710	9605	PSTC	BOC	F-11		close out remain projects Consultants		73,823.00	
6	34362740	6614		BOC	F-11		close out remain projects Rental Fees - Tower Lease		8,554.00	
7	34392740	9331		BOC	F-11		close out remain projects Minor Office Equipment & Furn		281,175.00	
8	34392740	9860		BOC	F-11		close out remain projects Equipment & Furniture		1,273.00	
9	34398140	9801	CTT	BOC	F-11		close out remain projects Land Acquisition		47,900.00	
10	34398140	9830	0618	BOC	F-11		close out remain projects Other Improvements		133,504.00	
11	34398140	9830	RESTR	BOC	F-11		close out remain projects Other Improvements		3,715.00	
12	34398310	9821		BOC	F-11		close out remain projects Building and Renovations		39,185.00	
13	34398310	9830	REPL	BOC	F-11		close out remain projects Other Improvements		85,217.00	
14	34390000	970118		BOC	F-11		close out remain projects Cont to Comm Investment Fund	765,612.00		
15	36497210	9830	FMD	BOC	F-11		close out remain projects Other Improvements		608.00	
16	36497309	9830		BOC	F-11		close out remain projects Other Improvements		1,388.00	
17	36497503	9821	HVAC	BOC	F-11		close out remain projects Building and Renovations		68,316.00	
18	36497338	9606		BOC	F-11		close out remain projects Engineers		55.00	
19	36497338	9849		BOC	F-11		close out remain projects Site Development		200.00	
20	36497407	9830	0632	BOC	F-11		close out remain projects Other Improvements		188,750.00	
21	36490000	970118		BOC	F-11		close out remain projects Cont to Comm Investment Fund	259,317.00		
22	40162740	6422		BOC	F-11		close out remain projects Contribution from Local Govt		40,212.00	
23	40192740	9445		BOC	F-11		close out remain projects Purchased Services	40,212.00		
24	00161960	6910		BOC	F-11		close out remain projects Cont From Capital Projects Fd		249,517.00	
25	00192740	9331		BOC	F-11		close out remain projects Minor Office Equipment & Furn	249,517.00		

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110943	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
26	10069120	6910		BOC	F-11		close out remain projects Cont From Capital Projects Fd		775,412.00	
27	10090000	9708		BOC	F-11		close out remain projects Cont to Capital Project Fund	436,289.00		
28	10090000	9830	AVAIL	BOC	F-11		close out remain projects Other Improvements	339,123.00		
29	39067230	6902	DM22	BOC	F-11		close out remain projects Contribution From General Fund		188,750.00	
30	39097230	9501	DM22	BOC	F-11		close out remain projects Buildings & Grounds Maintenanc	188,750.00		
31	38092710	9605	PSTC	BOC	F-11		close out remain projects Consultants	73,823.00		
32	38062710	6932	PSTC	BOC	F-11		close out remain projects Cont from Comm Investment Fund		73,823.00	
33	38098140	9830	RWP	BOC	F-11		close out remain projects Other Improvements	133,504.00		
34	38068140	6932	RWP	BOC	F-11		close out remain projects Cont from Comm Investment Fund		133,504.00	
35	001	5704		BOC	F-11		Appropriations		249,517.00	1
36	100	5704		BOC	F-11		Appropriations		775,412.00	1
37	343	5704		BOC	F-11		Appropriations	757,058.00		1
38	364	5704		BOC	F-11		Appropriations	259,317.00		1
39	380	5704		BOC	F-11		Appropriations		133,504.00	1
40	390	5704		BOC	F-11		Appropriations		188,750.00	1
41	401	5704		BOC	F-11		Appropriations		40,212.00	1
42	001	5703		BOC	F-11		Estimated Revenues	249,517.00		1
43	100	5703		BOC	F-11		Estimated Revenues	775,412.00		1
44	343	5703		BOC	F-11		Estimated Revenues	8,554.00		1
45	380	5703		BOC	F-11		Estimated Revenues	133,504.00		1
46	390	5703		BOC	F-11		Estimated Revenues	188,750.00		1

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110943	BUA	05/18/2022	05/18/2022	F-11	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
47	401	5703		BOC	F-11		Estimated Revenues	40,212.00		1
48	343	5707		BOC	F-11		Budgetary FB - Unreserved		765,612.00	1
49	364	5707		BOC	F-11		Budgetary FB - Unreserved		259,317.00	1
50	343	5704		BOC	F-11		Appropriations		765,612.00	1
51	364	5704		BOC	F-11		Appropriations		259,317.00	1
52	380	5704		BOC	F-11		Appropriations		73,823.00	1
53	380	5703		BOC	F-11		Estimated Revenues	73,823.00		1
54	343	5707		BOC	F-11		Budgetary FB - Unreserved	765,612.00		1
55	364	5707		BOC	F-11		Budgetary FB - Unreserved	259,317.00		1
							** JOURNAL TOTAL	3,511,076.00	3,511,076.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	110966	BUA	05/19/2022	05/19/2022	HMA	clsoles	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191510	9445		1510	HMA		HMA for Express Votes Purchased Services	25,500.00		
2	00191510	9697		1510	HMA		HMA for Express Votes Elections Expense		25,500.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111024	BUA	05/19/2022	05/19/2022	BOMB	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111024	BUA	05/19/2022	05/19/2022	BOMB	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9860	BOMB	2110	BOMB		One time purchase Equipment & Furniture	355,000.00		
2	00192110	9860		2110	BOMB		One time purchase Equipment & Furniture		355,000.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111029	BUA	05/19/2022	05/19/2022	Contract	kdbilafer	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191952	9607		9114	9114		Architect		7,000.00	
2	00191210	9114		9114	9114		Contracted Employees	7,000.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111065	BUA	05/20/2022	05/20/2022	Rent	mnxiong	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195610	9331	310-1	5610			For rent & fuel Minor Office Equipment & Furn		7,500.00	
2	00195610	9401		5610			For rent & fuel Building and Equipment Rentals	6,000.00		
3	00195610	9346	349-1	5610			For fuel Fuel	1,500.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111066	BUA	05/23/2022	05/23/2022	LiftGate	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111066	BUA	05/23/2022	05/23/2022	LiftGate	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094620	9370		4620	LiftGate		Lift Gate Replacement Recycling Program Expense		3,600.00	
2	27094620	9520		4620	LiftGate		Lift Gate Replacement Autos & Trucks Maintenance	3,600.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111067	BUA	05/23/2022	05/23/2022	Service Ceypineda		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191410	9445		1310	Service Ce		Service Center Purchased Services		1,416.00	
2	00191310	9860		1310	Service Ce		Service Center Equipment & Furniture	1,416.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111075	BUA	05/23/2022	04/22/2022	RECORD	msthorne	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	38062145	6902	SHELT	RECORD	RECORD		Move fund from BARN to SHE Contribution From General Fund		50,000.00	
2	38092145	9830	SHELT	RECORD	RECORD		Move fund from BARN to SHE Other Improvements	50,000.00		
3	38068140	6902	BARN	RECORD	RECORD		Move fund from BARN to SHE Contribution From General Fund	50,000.00		
4	38098140	9820	BARN	RECORD	RECORD		Move fund from BARN to SHE Construction		50,000.00	
							** JOURNAL TOTAL	0.00	0.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111077	BUA	05/23/2022	05/23/2022	Dues Subsc	lcruse	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00193250	9493	LIHP	3250	Dues Subsc		reallocate for WX Software Operations		586.00	
2	00193250	9630	LIHP	3250	Dues Subsc		WX Software increase Dues & Subscriptions	586.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111090	BUA	05/23/2022	05/23/2022	Rents	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195240	9401		5240	Rents		Cover rents Building and Equipment Rentals	171.00		
2	00195610	9401		5240	Rents		Cover rents Building and Equipment Rentals		171.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111110	BUA	05/23/2022	05/23/2022	Office Sup	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094620	9370		4620	Office Sup		Office Supplies Recycling Program Expense		150.00	
2	27094620	9301		4620	Office Sup		Office Supplies Office Supplies	150.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111132	BUA	05/24/2022	05/24/2022	Fuel	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111132	BUA	05/24/2022	05/24/2022	Fuel	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094620	9346		4620	Fuel		Increased Fuel Prices Fuel	2,000.00		
2	27094620	9445		4620	Fuel		Increased Fuel Prices Purchased Services		500.00	
3	27094620	9370		4620	Fuel		Increased Fuel Prices Recycling Program Expense		1,500.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111135	BUA	05/24/2022	05/24/2022	JCPC	jjshuping	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192910	9713	UNAL	2910	JCPC	T	TRANS TO COVER JCPC EXPENS JCPC-Unallocated		11,365.00	
2	00192910	974906		2910	JCPC	T	TRANS TO COVER JCPC EXPENS Fostering Solutions Crisis Bed		492.00	
3	00192910	9344		2910	JCPC	T	TRANS TO COVER JCPC EXPENS Teen Court	5,683.00		
4	00192910	974913		2910	JCPC	T	TRANS TO COVER JCPC EXPENS YDI Afterschool Academy	6,154.00		
5	00192910	9344	REST	2910	JCPC	T	TRANS TO COVER JCPC EXPENS Juv Community Service/Restitut	8.00		
6	00192910	974903		2910	JCPC	T	TRANS TO COVER JCPC EXPENS Shift Mentoring	8.00		
7	00192910	974912		2910	JCPC	T	TRANS TO COVER JCPC EXPENS Get Hired -Youth Employability	4.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111171	BUA	05/24/2022	05/24/2022	AUDIT	wmheglar	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191710	9603		AUDIT	AUDIT		INCREASE TO COVER MAJOR PR Auditors	12,945.00		

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111171	BUA	05/24/2022	05/24/2022	AUDIT	wmheglar	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
2	00191910	9109		AUDIT	AUDIT		INCREASE TO COVER MAJOR PR Salary Adjustments		12,945.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111189	BUA	05/24/2022	05/24/2022	training	mtrligon	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192730	9610				T	Travel		1,125.00	
2	00192730	9635				T	Education Programs	1,125.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111210	BUA	05/24/2022	05/24/2022	One Time Mits9		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191810	9860		1810	One Time M		One Time money Equipment & Furniture		385,900.00	
2	00191810	9862		1810	One Time M		One Time money Technology	64,000.00		
3	00191810	9342		1810	One Time M		One Time money Minor Technology Equipment	321,900.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111212	BUA	05/24/2022	05/24/2022	Mattressesblconrad		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111212	BUA	05/24/2022	05/24/2022	Mattressesblconrad		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192130	9305		2130	Mattresses	T	JAIL: Mattresses Linen supplies	15,900.00		
2	00192130	9331		2130	Mattresses	T	JAIL: Restraints Minor Office Equipment & Furn	2,850.00		
3	00192130	9320		2130	Mattresses	T	JAIL: Mattresses & Restra Printing & Binding		1,687.00	
4	00192130	9342		2130	Mattresses	T	JAIL: Mattresses & Restra Minor Technology Equipment		1,081.00	
5	00192130	9394		2130	Mattresses	T	JAIL: Mattresses & Restra Janitorial Supplies		15,982.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111294	BUA	05/25/2022	05/25/2022	RECORD	msthorne	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	38092110	9830	RANGE	RECORD			Reallocate Cap Proj Funds Other Improvements		300,000.00	
2	38062110	6902	RANGE	RECORD			Reallocate Cap Proj Funds Contribution From General Fund	300,000.00		
3	38098140	9830	RWP	RECORD			Reallocate Cap Proj Funds Other Improvements	300,000.00		
4	38068140	6932	RWP	RECORD			Reallocate Cap Proj Funds Cont from Comm Investment Fund		300,000.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111324	BUA	05/25/2022	05/25/2022	Move Capitits9		1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192410	9862		2410	Move Capit		Move from Capital Account Technology		32,000.00	
2	00192410	9342		2410	Move Capit		Move from Capital Account Minor Technology Equipment	32,000.00		
							** JOURNAL TOTAL	0.00	0.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111342	BUA	05/25/2022	05/25/2022	Retire	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191210	9610		1210	Retire		Retirement Travel		400.00	
2	00191210	9335		1210	Retire		Retirement Food	400.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111345	BUA	05/25/2022	05/25/2022	A/C P Svc	blconrad	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192140	9330		2140	A/C P Svc	T	A/C Purchased Services-VET Tools & Minor Equipment	3.00		
2	00192140	9445		2140	A/C P Svc	T	A/C Purchased Services-VET Purchased Services	2,150.00		
3	00192140	9301		2140	A/C P Svc	T	A/C Purchased Services-VET Office Supplies		1,378.00	
4	00192140	9320		2140	A/C P Svc	T	A/C Purchased Services-VET Printing & Binding		500.00	
5	00192140	9630		2140	A/C P Svc	T	A/C Purchased Services-VET Dues & Subscriptions		275.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111346	BUA	05/25/2022	05/25/2022	Overtime	kpgrant	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094620	9370		4620	Overtime		Overtime Recycling Program Expense		1,000.00	
2	27094620	9113		4620	Overtime		Overtime Overtime	1,000.00		
							** JOURNAL TOTAL	0.00	0.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111388	BUA	05/26/2022	05/26/2022	MAterials	kdbilafer	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191952	9504		9504	9504		Building and grounds materials	13,000.00		
2	00191951	9504		9504	9504		Building and grounds materials		13,000.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111389	BUA	05/26/2022	05/26/2022	EQUIP REPA	trligon	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192730	9360				T	Medical Supplies		6,000.00	
2	00192730	9610				T	Travel		2,000.00	
3	00192730	9330				T	Tools & Minor Equipment	8,000.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111408	BUA	05/27/2022	05/27/2022	AUDIT	wmheglar	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191710	9603		AUDIT	AUDIT		PENSION AUDIT Auditors	9,350.00		
2	00191910	9109		AUDIT	AUDIT		PENSION AUDIT Salary Adjustments		9,350.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111494	BUA	05/27/2022	05/27/2022	Legal Fees	mnxiong	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111494	BUA	05/27/2022	05/27/2022	Legal Fees	mnxiong	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195630	9445		5630	5630		To cover legal fees Purchased Services		2,500.00	
2	00195630	9609	349-1	5630	5630		To cover legal fees Legal fees-Gen Serv Support	2,500.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111516	BUA	05/31/2022	05/31/2022	School	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9109		7130	School		School Allocation Salary Adjustments		8,885.00	
2	00197130	9733		7130	School		School Allocation KCS Building Maintenence	8,885.00		
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111517	BUA	05/31/2022	05/31/2022	Auto & Tru	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00198140	9520		1910	Auto & Tru		Auto and Truck Maint Autos & Trucks Maintenance	794.00		
2	00191952	9520		1910	Auto & Tru		Auto and Truck Maint Autos & Trucks Maintenance	2,049.00		
3	00191910	9520		1910	Auto & Tru		Auto and Truck Maint Autos & Trucks Maintenance		2,843.00	
							** JOURNAL TOTAL	0.00	0.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111543	BUA	05/31/2022	06/02/2022	Reverse	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2022	11	111543	BUA	05/31/2022	06/02/2022	Reverse	ypineda	1	N	Hist	2022	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9361	JAG	2110	Reverse		Reverse JN 110197 Office of Justice Program Gran		3,530.00	
2	00192110	9316		2110	Reverse		Reverse JN 110197 Supplies	3,530.00		
							** JOURNAL TOTAL	0.00	0.00	
							** GRAND TOTAL	26,900,373.00	26,900,373.00	

64 Journals printed

** END OF REPORT - Generated by Yesenia Pineda **

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Reports

SUBJECT:
Budget - Monthly Financial Update

BRIEF SUMMARY:
The County Manager requested monthly reports 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.

ATTACHMENTS:

- Report

Cabarrus County, North Carolina
General Fund
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2022*

*this report was pulled prior to month end close

	Budgeted Amounts				Variance with	% Collected
	Original	Final	Actual Amounts	Encumbrances*	Final Budget	or Used
REVENUES						
Ad Valorem Taxes & Interest	(213,023,933)	(213,023,933)	(217,851,363)	$ -	$ (4,827,430)	102.3%
Other Taxes	(39,310,492)	(39,310,492)	(33,500,808)	-	5,809,684	85.2%
Intergovernmental Revenues	(21,726,474)	(28,769,369)	(22,823,310)	-	5,946,059	79.3%
Permits and Fees	(9,630,442)	(9,630,442)	(9,764,000)	-	(133,558)	101.4%
Sales and Services	(13,104,565)	(13,136,825)	(12,129,360)	-	1,007,465	92.3%
Investment Earnings	(100,000)	(100,000)	(310,601)	-	(210,601)	310.6%
Miscellaneous/Other Finance Sources	(265,580)	(22,171,807)	(1,645,935)	-	20,525,872	7.4%
TOTAL REVENUES	**(297,161,486)**	**(326,142,868)**	**(298,025,377)**	**$ -**	**$ 28,117,491**	**91.4%**
EXPENDITURES						
GENERAL GOVERNMENT						
Board of Commissioners	$ 1,101,285	$ 1,193,285	$ 1,034,952	$ 4,325	154,008	86.7%
County Manager	2,382,930	3,220,384	2,485,335	372,080	362,969	88.7%
Communications	799,956	804,956	578,025	17,195	209,736	73.9%
Human Resources	1,297,620	1,295,620	903,059	40,814	351,747	72.9%
Tax Collector	1,199,490	1,200,906	1,041,428	-	159,478	86.7%
Tax Administration	2,557,968	2,556,552	2,449,855	-	106,697	95.8%
Board of Elections	1,804,565	2,138,140	1,121,707	150,791	865,642	59.5%
Register of Deeds	661,111	671,111	647,921	-	23,190	96.5%
Finance	1,437,154	1,621,264	1,338,019	186,719	96,526	94.0%
Information Technology	7,148,868	8,567,305	6,712,417	846,424	1,008,464	88.2%
Non-departmental*	8,112,684	4,671,276	273,210	531,500	3,866,566	17.2%
Infrastructure & Asset Management						
Grounds Maintenance	1,836,126	2,049,252	1,331,277	433,814	284,161	86.1%
Administration	2,118,059	2,269,427	1,803,197	7,819	458,411	79.8%
Sign Maintenance	238,118	225,118	176,602	9,125	39,390	82.5%
Building Maintenance	2,465,294	3,373,961	1,852,083	700,649	821,229	75.7%
Facility Services	1,876,138	1,968,651	1,736,995	46,231	185,426	90.6%
Fleet Maintenance	1,170,093	1,803,753	934,382	431,269	438,102	75.7%
Contribution to Other Funds	51,810,764	72,450,120	70,031,040	-	2,419,080	96.7%
Total General Government	**$ 90,018,223**	**$ 112,081,081**	**$ 96,451,506**	**$ 3,778,755**	**$ 11,850,821**	**89.4%**
PUBLIC SAFETY						
Sheriff						
Administration & Operations	$ 22,507,321	$ 21,141,466	11,036,165	$ 2,111,366	$ 7,993,935	62.2%
Jail	12,698,344	12,814,145	11,640,906	350,486	822,753	93.6%
Animal Control	897,640	975,045	859,714	69,654	45,677	95.3%
Animal Shelter	666,843	710,622	547,694	19,637	143,291	79.8%
Courts Maintenance	309,613	309,613	112,450	12,588	184,575	40.4%
Construction Standards	5,409,897	6,051,628	4,165,801	238,666	1,647,161	72.8%
Emergency Management	336,442	463,139	332,436	12,381	118,322	74.5%
Fire Services	1,628,178	1,638,626	1,412,041	34,075	192,510	88.3%
Fire Districts	1,238,539	1,238,539	1,095,793	-	142,746	88.5%
Emergency Medical Services	11,165,669	11,519,419	10,604,923	302,530	611,966	94.7%
Other Public Safety*	1,146,433	1,191,520	1,198,007	343,441	(349,929)	129.4%
Total Public Safety	**$ 58,004,918**	**$ 58,053,763**	**$ 43,005,929**	**$ 3,494,825**	**$ 11,553,008**	**80.1%**

* 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 May 31, 2022*

*this report was pulled prior to month end close

	Budgeted Amounts				Variance with	% Collected
	Original	Final	Actual Amounts	Encumbrances*	Final Budget	or Used
ECONOMIC & PHYSICAL DEVELOPMENT						
Planning & Development						
Planning	783,419	716,109	$ 601,239	$ -	$ 114,870	84.0%
Community Development	622,542	784,121	524,673	-	259,448	66.9%
Soil & Water Conservation	267,540	277,865	243,026	-	34,839	87.5%
Zoning Administration	237,410	239,060	236,082	(0)	2,978	98.8%
Economic Development Corporation	768,057	793,057	664,039	-	129,018	83.7%
Economic Development Incentives	2,127,000	2,114,422	401,171	-	1,713,251	19.0%
Other Economic & Physical Development*	1,526,402	1,638,980	1,609,077	43,000	(13,097)	100.8%
Total Economic & Physical Development	**$ 6,332,370**	**$ 6,563,614**	**$ 4,279,307**	**$ 43,000**	**$ 2,241,307**	**65.9%**
ENVIRONMENTAL PROTECTION						
Waste Reduction	$ -	$ 19,234	$ 19,234	$ -	$ -	100.0%
Total Environmental Protection	**$ -**	**$ 19,234**	**$ 19,234**	**$ -**	**$ -**	**100.0%**
HUMAN SERVICES						
Veterans Services	$ 311,213	$ 311,213	$ 301,586	$ -	$ 9,627	96.9%
Cooperative Extension	413,571	453,559	$ 247,113	-	206,446	54.5%
Human Services						
Administration	5,090,814	5,071,363	4,539,733	99,884	431,746	91.5%
Economic Family Support Services	2,977,485	4,149,755	2,767,186	-	1,382,569	66.7%
Transportation	3,299,676	4,231,734	1,916,187	783,942	1,531,605	63.8%
Child Welfare	10,167,305	10,312,183	8,324,396	132,743	1,855,044	82.0%
Child Support Services	2,041,115	2,041,115	1,872,475	10,635	158,005	92.3%
Economic Services	8,770,957	8,770,957	7,258,564	-	1,512,393	82.8%
Adult and Family Services	2,306,497	2,321,923	1,977,997	589	343,337	85.2%
Nutrition	695,645	843,180	626,689	8,661	207,829	75.4%
Senior Services	758,556	834,573	578,333	102,368	153,872	81.6%
Cabarrus Health Alliance	9,198,703	9,198,703	8,530,562	668,141	-	100.0%
Other Human Services*	740,511	1,155,511	1,080,576	239,435	(164,500)	114.2%
Total Human Services	**$ 46,772,047**	**$ 49,695,768**	**$ 40,021,397**	**$ 2,046,398**	**$ 7,627,974**	**84.7%**
EDUCATION						
Cabarrus County Schools Operating	$ 76,001,849	$ 76,391,357	$ 69,979,960	$ -	$ 6,411,397	91.6%
Kannapolis City Schools Operating	9,105,993	9,175,370	9,075,034	-	100,336	98.9%
RCCC Operating	3,754,500	3,754,500	3,754,500	-	-	100.0%
Cabarrus County Schools Capital	36,324	36,324	30,270	-	6,054	83.3%
Kannapolis City Schools Capital	8,832	8,832	7,360	-	1,472	83.3%
RCCC Capital	-	-	-	-	-	-
Other Education*	134,405	134,405	130,238	-	4,167	96.9%
Total Education	**$ 89,041,903**	**$ 89,500,788**	**$ 82,977,362**	**$ -**	**$ 6,523,426**	**92.7%**
CULTURE & RECREATION						
Active Living & Parks						
Parks	$ 1,905,115	$ 2,534,571	$ 1,568,571	$ 578,032	$ 387,968	84.7%
Senior Centers	876,027	899,412	545,099	15,433	338,880	62.3%
Library System	4,184,883	4,519,119	3,733,773	388,286	397,060	91.2%
Other Cultural & Recreation*	26,000	26,000	26,000	95,000	(95,000)	465.4%
Total Culture & Recreation	**$ 6,992,025**	**$ 7,979,102**	**$ 5,873,443**	**$ 1,076,752**	**$ 1,028,907**	**87.1%**
DEBT SERVICE						
Schools	$ -	$ -	$ -	$ -	$ -	-
Other	-	-	-	-	-	-
Total Debt Service	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
TOTAL EXPENDITURES	**$ 297,161,486**	**$ 323,893,351**	**$ 272,628,178**	**$ 10,439,729**	**$ 40,825,444**	**87.4%**
Excess (deficiency) of revenues over (under) expenditures	**$ -**	**$ 2,249,517**	**$ 25,397,199**	**$ (10,439,729)**	**$ 12,707,952**	

* 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
Community Investment Fund
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2022*

***this report was pulled prior to month end close**

	Budgeted Amounts				Variance with	% Collected
	Original	Final	Actual Amounts	Encumbrances*	Final Budget	or Used
REVENUES						
Other Taxes	$ (22,571,000)	$ (22,571,000)	$ (19,579,627)	$ -	$ 2,991,373	86.7%
Intergovernmental Revenues	(3,020,000)	(720,000)	(726,978)	-	(6,978)	101.0%
Other Finance Sources	(40,259,785)	(67,248,194)	(65,102)	-	67,183,092	0.1%
TOTAL REVENUES	**$ (65,850,785)**	**$ (90,539,194)**	**$ (20,371,707)**	**$ -**	**$ 2,984,395**	**22.5%**
EXPENDITURES						
Operations	$ 49,691,367	$ 59,859,031	$ 55,403,232	$ 4,350	$ 4,451,449	92.6%
Capital Outlay	16,159,418	30,680,163	-	-	30,680,163	0.0%
TOTAL EXPENDITURES	**$ 65,850,785**	**$ 90,539,194**	**$ 55,403,232**	**$ 4,350**	**$ 35,131,612**	**61.2%**
Excess (deficiency) of revenues over (under) expenditures	**$ -**	**$ -**	**$ (35,031,525)**	**$ (4,350)**	**$ (32,147,217)**	

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Cabarrus County, North Carolina
Other Funds
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2022*

*this report was pulled prior to month end close

	Budgeted Amounts				Variance with	% Collected
	Original	Final	Actual Amounts	Encumbrances*	Final Budget	or Used
Arena and Events Center						
REVENUES						
Arena Other Finance Source Revenues	$ (1,228,084)	$ (1,528,084)	$ (1,534,808)	$ -	$ (6,724)	100.4%
Fair Sales and Services	(694,737)	(694,737)	(32,301)	-	662,436	4.6%
Fair Investment Earnings	(15,000)	(15,000)	(934)	-	14,066	6.2%
Fair Miscellaneous Revenue	(5,000)	(5,000)	(684)	-	4,316	13.7%
Total Arena and Events Center Fund	**$ (1,942,821)**	**$ (2,242,821)**	**$ (1,568,727)**	**$ -**	**$ 674,094**	**69.9%**
EXPENDITURES						
Arena and Events Center	$ 1,228,084	$ 1,528,084	$ 462,586	$ 484,095	$ 581,402	62.0%
County Fair	714,737	714,737	250,008	10,000	454,729	36.4%
Total Arena and Events Center Fund	**$ 1,942,821**	**$ 2,242,821**	**$ 712,595**	**$ 494,095**	**$ 1,036,131**	**53.8%**
Landfill Fund						
REVENUES						
Intergovernmental Revenues	$ (65,000)	$ (65,000)	$ (40,223)	$ -	$ 24,777	61.9%
Permits and Fees	(145,000)	(145,000)	(124,552)	-	20,448	85.9%
Sales and Services	(1,286,000)	(1,286,000)	(1,016,377)	-	269,623	79.0%
Investment Earnings	(28,508)	(28,508)	(2,570)	-	25,938	9.0%
Investment Earnings	(553,055)	(568,983)	(553,055)	-	15,928	97.2%
Total Landfill Fund	**$ (2,077,563)**	**$ (2,093,491)**	**$ (1,736,776)**	**$ -**	**$ 356,715**	**$ 3**
EXPENDITURES						
Landfill Operations	$ 2,077,563	$ 2,093,491	$ 1,631,857	$ 268,568	$ 193,066	90.8%
Total Landfill Fund	**$ 2,077,563**	**$ 2,093,491**	**$ 1,631,857**	**$ 268,568**	**$ 193,066**	**90.8%**
911 Emergency Telephone Fund						
REVENUES						
Intergovernmental Revenues	$ (691,166)	$ (731,378)	$ (616,184)	$ -	$ 115,194	84.2%
Investment Earnings	(1,500)	(1,500)	(279)	-	1,221	18.6%
Other Finance Sources	-	-	-	-	-	0.0%
Total 911 Emergency Telephone Fund	**$ (692,666)**	**$ (732,878)**	**$ (616,463)**	**$ -**	**$ 116,415**	**84.1%**
EXPENDITURES						
Operations	$ 662,902	$ 703,114	$ 228,226	$ -	$ 474,888	32.5%
Debt Service	29,764	29,764	29,763	-	1	100.0%
Total 911 Emergency Telephone Fund	**$ 692,666**	**$ 732,878**	**$ 257,989**	**$ -**	**$ 474,889**	**35.2%**
Self-Insured Funds						
REVENUES						
Sales and Services	$ (15,142,513)	$ (15,142,513)	$ (12,533,300)	$ -	$ 2,609,213	82.8%
Investment Earnings	(35,000)	(35,000)	(3,895)	-	31,105	11.1%
Miscellaneous	(682,550)	(744,163)	(627,930)	-	116,233	84.4%
Other Finance Sources	(1,115,994)	(1,115,994)	-	-	1,115,994	0.0%
Total Self-Insured Funds	**$ (16,976,057)**	**$ (17,037,670)**	**$ (13,165,124)**	**$ -**	**$ 3,872,546**	**77.3%**
EXPENDITURES						
Workers Compensation Insurance	$ 1,300,000	$ 1,306,530	$ 789,558	$ -	$ 516,972	60.4%
Liability Insurance	1,145,994	1,491,287	1,249,624	-	241,663	83.8%
Dental Insurance	505,956	505,956	435,614	-	70,342	86.1%
Hospitalization Insurance	14,024,107	18,367,257	14,003,137	213,759	4,150,361	77.4%
Total Self-Insured Funds	**$ 16,976,057**	**$ 21,671,030**	**$ 16,477,933**	**$ 213,759**	**$ 4,979,338**	**77.0%**

Cabarrus County, North Carolina
Other Funds
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2022*
*this report was pulled prior to month end close

	Budgeted Amounts				Variance with	% Collected
	Original	Final	Actual Amounts	Encumbrances*	Final Budget	or Used
Fire Districts Fund						
REVENUES						
Ad Valorem Taxes	$ (5,909,748)	$ (6,444,748)	$ (5,995,638)	$ -	$ 449,110	93.0%
Total Fire Districts Fund	**$ (5,909,748)**	**$ (6,444,748)**	**$ (5,995,638)**	**$ -**	**$ 449,110**	**93.0%**
EXPENDITURES						
Fire Districts	$ 5,909,748	$ 6,444,748	$ 5,995,683	$ -	$ 449,065	93.0%
Total Fire Districts Fund	**$ 5,909,748**	**$ 6,444,748**	**$ 5,995,683**	**$ -**	**$ 449,065**	**93.0%**
Social Services Fund						
REVENUES						
Sales and Services	$ (400,000)	$ (400,000)	$ -	$ -	$ 400,000	0.0%
Total Social Services Fund	**$ (400,000)**	**$ (400,000)**	**$ -**	**$ -**	**$ 400,000**	**0.0%**
EXPENDITURES						
Operations	$ 400,000	$ 400,000	$ -	$ -	$ 400,000	0.0%
Total Social Services Fund	**$ 400,000**	**$ 400,000**	**$ -**	**$ -**	**$ 400,000**	**0.0%**
Intergovernmental Fund						
REVENUES						
Sales and Services	$ (2,000,000)	$ (2,000,000)	$ (1,589,848)	$ -	$ 410,152	79.5%
Total Intergovernmental Fund	**$ (2,000,000)**	**$ (2,000,000)**	**$ (1,589,848)**	**$ -**	**$ 410,152**	**79.5%**
EXPENDITURES						
Operations	$ 2,000,000	$ 2,000,000	$ 1,487,307	$ -	$ 512,693	74.4%
Total Intergovernmental Fund	**$ 2,000,000**	**$ 2,000,000**	**$ 1,487,307**	**$ -**	**$ 512,693**	**74.4%**
TOTAL REVENUES	**$ (29,998,855)**	**$ (30,951,608)**	**$ (24,672,576)**	**$ -**	**$ 6,279,032**	**79.7%**
TOTAL EXPENDITURES	**$ 29,998,855**	**$ 35,584,968**	**$ 26,563,364**	**$ 976,422**	**$ -**	**77.4%**
Excess (deficiency) of revenues over (under) expenditures	**$ -**	**$ (4,633,360)**	**$ (1,890,788)**	**$ (976,422)**	**$ 6,279,032**	

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CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

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.

ATTACHMENTS:

- Report
- Report

Cabarrus County Construction Standards Dodge Report 5/1/2022-5/31/2022

Jurisdiction: All

New Construction

Description	Const Code	Buildings	Housing Units	Estimated Cost
Single Family Houses Detached	101	84	79	$16,405,718.00
Single Family Houses Attached	102	43	43	$4,569,784.00
Manufactured Home (Mobile Homes)	106	19	17	$398,500.00
Industrial Buildings	320	1	0	$151,395.00
Hospitals and Institutional Buildings	323	1	0	$347,800.00
Office, Bank, and Professional Buildings	324	8	0	$1,306,394.00
Public Works and Utilities Buildings	325	1	0	$154,993.00
Stores and Customer Services	327	6	0	$2,909,721.00
Other Nonresidential Buildings	328	3	0	$198,600.00
Structures Other Than Buildings	329	11	0	$151,866.00
Other	999	12	0	$87,477.50
Sub Total (New Construction)		189	139	$26,682,248.50

Addition, Alteration, and Conversion

Description	Const Code	Buildings	Housing Units	Estimated Cost
Additions, Alterations and Conversions - Residential	434	2	1	$597,637.47
Additions, Alterations and Conversions - Nonresidential and No housekeeping	437	12	1	$817,718.00
Sub Total (Addition, Alteration, and Conversion)		14	2	$1,415,355.47

Demolition of Buildings

Description	Const Code	Buildings	Housing Units	Estimated Cost
All Other Buildings and Structures	649	1	0	$6,000.00
Sub Total (Demolition of Buildings)		1	0	$6,000.00
Grand Total		**204**	**141**	**$28,103,603.97**

Cabarrus County Commercial Building Plan Review Summary

Begin Date: 5/1/2022 through End Date: 5/31/2022

	File Date	Address	Application Name	Description	Est Cost	Est Sq Ft
BU2022-01492	5/2/2022	3811 COCHRAN RD CONCORD, NC 28027	SouthWood Corporation	Roberta Road Middle School~~Installation of one (1) DF Main ID SIGN	$8,000	0
BU2022-01504	5/2/2022	1460 RAINBOW DR KANNAPOLIS, NC 28081	SouthWood Corporation/Adrian Gray	Installation of one (1) double face Main ID	$8,000	0
BU2022-01505	5/2/2022	384 CHURCH ST N CONCORD, NC 28025	SEUNG KO/JAJ Beauty Supply	SHELVING FOR PRODUCTS IN SALON	$14,000	0
BU2022-01515	5/3/2022	3630 POPLAR TENT RD CONCORD, NC 28027	AVERY GENERAL CONTRACTING INC	Blackridge Financial~~Tenant upfit with office, restroom, and large office space	$36,770	1,290
BU2022-01524	5/3/2022	8415 PIT STOP CT NW CONCORD, NC 28027	HARWOOD SIGNS	Illuminated wall sign. Suite 202	$3,200	0
BU2022-01527	5/3/2022	430 HARRIS ST NW CONCORD, NC 28025	REYNGROUP	WALL SIGN AND MONUMENT SIGN	$3,000	20
BU2022-01528	5/3/2022	604 N CANNON BLVD KANNAPOLIS, NC 28083	Interstate Sign Co., Inc.	Han-Dee Hugo's~~211011-012~~Building: Removal the Shop sign and install a new illuminated Han-Dee Hugo's sign. Freestanding Sign: Removal of the existing pole system and installing a new pole system utilizing the existing foundation using adapter plates.	$7,873	1,200
BU2022-01534	5/3/2022	505 E C ST KANNAPOLIS, NC 28083	REYNGROUP	WALL AND MONUMENT SIGN	$4,000	21
BU2022-01540	5/4/2022	202 MCGILL AVE NW CONCORD, NC 28025	IKES CONSTRUCTION INC	2,938 sq. ft ADDITION containing two waiting rooms, front office, 4 medical exam rooms, 3 dental treatment rooms, dental imaging, nurse station, and offices.	$706,815	2,938
BU2022-01558	5/4/2022	2222 ROXIE ST KANNAPOLIS, NC 28083	DIRAC BUILDERS LLC	Cilliaya Gene Boutique~~New interior walls for 2 fitting rooms, finishes and a single user toilet room. The space will also have a stock room at the back of the space. The existing building is Type II-B construction.	$54,000	1,600
BU2022-01562	5/4/2022	2050 KANNAPOLIS HWY CONCORD, NC 28027	JACKSON, EUGENE BLAIR, JR	install load bearing beams to open up floor space, add new ADA Restroom, new MEP's when drawings complete	$15,000	1,407
BU2022-01568	5/4/2022	1275 W A ST KANNAPOLIS, NC 28081	BLYTHE BROTHERS ASPHALT CO., L.L.C.	installation of new conduit and wiring, 3 new parking lot pole lights, 3 flag pole lights, and timeclock to control same from existing circuitry	$9,560	0
BU2022-01574	5/5/2022	167 UNION ST N CONCORD, NC 28025	TRIDENT CONCRETE FORMING, INC	BUIDING UPFIT FOR EMERGENCY EGRESS Level 1 ALTERATIONS	$2,000	0
BU2022-01577	5/5/2022	761 CENTRAL DR NW CONCORD, NC 28027	Gilmore Chapel AME Zion Church	Gilmore Chapel AME Zion Church~~New Front Addition	$14,000	160
BU2022-01580	5/5/2022	305 MCGILL AVE NW, SUITE# 200-03 CONCORD, NC 28027	G.W. LILES CONSTRUCTION COMPANY, INC	580 SF new food stall. New MEP, equipment, and layout	$144,000	648
BU2022-01581	5/5/2022	3030 S CANNON BLVD KANNAPOLIS, NC 28083	FOXX & FANDEL, LLC, T/A FOXX CONTRACTING	Interior Renovation to lobby and back of house areas; adding exam rooms	$347,800	5,200
BU2022-01583	5/5/2022	5040 NC HWY 49 S HARRISBURG, NC 28075	DRESSLER CONSTRUCTION LLC	Sunflour~~New walls and doors for bakery room. Room will have new plumbing, HVAC, lights, outlets, and equipment.	$151,395	1,500

Cabarrus County Commercial Building Plan Review Summary

Begin Date: 5/1/2022 through End Date: 5/31/2022

BU2022-01587	5/6/2022	2241 SPIDER DR NE A CONCORD, NC 28083	Quality Neon, Inc	2 lighted wall signs - 1 in the front and 1 in the back	$3,600	0
BU2022-01600	5/6/2022	242 OAK AVE KANNAPOLIS, NC 28081	GCL DEVELOPMENT, LLC	Convert Storage area of suite 242 to a single office with a proposed suite number of 240. New exterior access will be added and a new restroom will be added for the up fitted space.	$101,000	1,500
BU2022-01641	5/10/2022	2850 S CANNON BLVD KANNAPOLIS, NC 28083	Interstate Sign Co., Inc.	Removal of a sign and Installation of a new sign.	$12,305	4,486
BU2022-01645	5/10/2022	257 CHURCH ST N CONCORD, NC 28025	BROOM SIGN CO	It is a commercial ground sign 2 feet by 5 feet or 10 square feet. A double sided sign, sandblasted HDPU board with 4 inch by 4 inch cedar posts with oil based stain applied and ground mounted.	$1,000	10
BU2022-01652	5/11/2022	7625 HENDRICK AUTO PLZ NW CONCORD, NC 28027	LOCKWOOD IDENTITY INC DBA SIGNART	Two D/f 91.5 tall x 48" wide monument signs	$19,000	0
BU2022-01660	5/11/2022	235 CABARRUS AVE E CONCORD, NC 28025	preston, gregory s.	COMMERCIAL UPFIT	$97,637	2,200
BU2022-01665	5/11/2022	7670 BRUTON SMITH BLVD CONCORD, NC 28027	SIGN ART	remove old signs and install new 6 wall signs	$11,750	0
BU2022-01673	5/12/2022	2498 WONDER DR NE CONCORD, NC 28083	VICTORI CONSTRUCTION, LLC	Demising one large existing tenant in strip center into 2 smaller blank spaces, ready for future tenants to complete upfits as necessary for their usage.	$40,000	4,135
BU2022-01674	5/12/2022	8021 CONCORD MILLS BLVD CONCORD, NC 28027	DCOTA CONSUCTION, LLC	COMMERCIAL UPFIT	$500,000	7,230
BU2022-01675	5/12/2022	311 BROOKDALE ST KANNAPOLIS, NC 28083	JOHNSON'S ROOFING SERVICE	Skateland of Kannapolis Existing top metal roof system will be removed. Existing original metal panel roof will remain. Remove the base flashing from all vertical surfaces. Remove the exterior sheet metal flashings from perimeters. New (1) layer of EPS roof insulation flute fill loose laid into panels. New (1) layer of 1/2" HD iso MA through new EPS and into panels. New MA .045 TPO membrane roof system. Color to be white. TPO wall flashings on all vertical surfaces. Premolded pipe seals on all plumbing penetrations. New 24 gauge prefinished steel exterior sheet metal gutter and downspout, gravel stop and counterflashing.	$183,389	24,000
BU2022-01684	5/13/2022	700 CHURCH ST N CONCORD, NC 28025	West Atlantic Logistics Signage	Casco will be installing a painted post and panel sign at this location. It will be non-illuminated.	$4,400	1
BU2022-01695	5/13/2022	1790 NC HWY 24-27 E MIDLAND, NC 28107	BANNER ENTERPRISE, LLC	Installation of steel to further reinforce cell tower structure.	$32,978	0
BU2022-01705	5/16/2022	427 CHURCH ST N CONCORD, NC 28025	BROOME SIGN COMPANY	Concord Travel Signage~~commercial ground sign, 36” x 96”, 18 sq ft, mounted in the ground, non-illuminated, and built completed out of aluminum. No higher than 6ft to the top	$1,150	18
BU2022-01706	5/16/2022	12198 UNIVERSITY CITY BLVD HARRISBURG, NC 28075	POWERHOUSE RETAIL SERVICES, LLC	Truist Bank~~Install "UpSend" pneumatic tube system from bank to drive thru. Provide electric as needed.	$75,000	0
BU2022-01728	5/17/2022	114 S MAIN ST KANNAPOLIS, NC 28081	DM MANAGEMENT, INC	Gaelic Alley~~Upfit of existing space for a private club.	$20,000	1,572
BU2022-01730	5/18/2022		UBALDO'S CONSTRUCTION AND REMODELING OF NC INC	SIP CO. Refurbished Container	$150,000	320

Cabarrus County Commercial Building Plan Review Summary

Begin Date: 5/1/2022 through End Date: 5/31/2022

BU2022-01734	5/18/2022	3700 TAYLOR GLEN LN NW 310A CONCORD, NC 28027	EDIFICE, INC.	COMMERCIAL UPFIT	$57,100	1,000
BU2022-01736	5/18/2022	3700 TAYLOR GLEN LN NW 226B CONCORD, NC 28027	EDIFICE, INC.	COMMERCIAL UPFIT	$57,100	1,000
BU2022-01738	5/18/2022	7550 HENDRICK AUTO PLZ NW CONCORD, NC 28027	Sign Connection, Inc.	Hendrick Kia Signage~~6 internally illuminated wall signs of varying sq footage and 1 face change on existing ground sign	$10,000	0
BU2022-01741	5/18/2022	5755 NC HWY 49 S HARRISBURG, NC 28075	QUIKTRIP KITCHEN EXPANSION #1031	LAYOUT AND EQUIPMENT MODIFICATIONS TO EXISTING FULL SERVICE COUNTER, SALES FLOOR AND CHECKSTAND.	$116,680	3,000
BU2022-01750	5/19/2022	1777 OLD EARNHARDT RD KANNAPOLIS, NC 28083	HOLTON CONSTRUCTION CONCEPTS	finish upstairs for office space	$95,000	850
BU2022-01789	5/23/2022	5680 tractor LN harrisburg, nc 28075	WIMCO CORPORATION	PANERA~~NEW GROUND UP SHELL BUILDING FOR A RESTAURANT	$1,645,821	3,512
BU2022-01794	5/23/2022	4250 MAIN ST 109 HARRISBURG, NC 28075	RATZLAFF CONSTRUCTION LLC	Existing brewery is expanding into a vacant adjacent space. Remove existing finishes and walls. Install new brewery equipment and expand bar.	$18,000	1,126
BU2022-01795	5/23/2022	6801 MT OLIVE RD CONCORD, NC 28025	MASTEC NETWORK SOLUTIONS	remove and replace existing antennas, rrus, and cabinets, add breaker, expand existing concrete pad	$24,600	30
BU2022-01812	5/24/2022	230 OAK AVE KANNAPOLIS, NC 28081	GCL DEVELOPMENT, LLC	OFFICE SPACE ONLY	$10,000	1,500
BU2022-01816	5/24/2022	234 OAK AVE KANNAPOLIS, NC 28081	GCL DEVELOPMENT, LLC	COMMERCIAL UPFIT	$48,200	1,500
BU2022-01818	5/24/2022	10030 EDISON SQUARE DR NW CONCORD, NC 28027	SIGNS UNLIMITED OF CHARLOTTE INC.	Atrium Health Signage ~~ 65 SQ FT wall sign	$3,000	0
BU2022-01819	5/24/2022	2011 NC HWY 49 S CONCORD, NC 28027	ENGINEERED HANDLING INCORPORATED	Mateenbar Phase 2~~Install pallet rack and storage platform in existing building with existing life safety equipment and existing NFPA13 sprinklers. Required sprinklers under the pallet rack and storage platform by others on separate permit	$156,000	6,076
BU2022-01824	5/25/2022	1925 AVIATION CIR CONCORD, NC 28025	SYNC STORAGE SOLUTIONS, INC.	Type II-B construction of 5 back to back rows of 16' selective rack	$45,472	4,386
BU2022-01825	5/25/2022	940 CONCORD PKWY N CONCORD, NC 28027	CARMEL CONTRACTORS, INC	Reconfiguration / expansion under existing canopy to support Tool Rental Center; existing footprint not affected.	$420,000	1,609
BU2022-01826	5/25/2022	305 MCGILL AVE NW CONCORD, NC 28027	G.W. LILES CONSTRUCTION COMPANY, INC	On Second Floor of Gibson Mill Food Hall (Previously Permitted in 2019) we are doing a restaurant upfit with a commercial kitchen that supports the restaurant and two food stalls.	$150,000	3,895
BU2022-01828	5/25/2022	180 CONCORD COMMONS PL SW CONCORD, NC 28027	KIRKLAND INC.	Shell Addition to Planet Fitness	$535,900	4,750
BU2022-01832	5/25/2022	940 CONCORD PKWY N CONCORD, NC 28027	Delson Alves	SIGN for Curbside Pickup Structure at Lowes.	$18,000	1,296
BU2022-01833	5/25/2022	3025 DALE EARNHARDT BLVD KANNAPOLIS, NC 28083	McCue	SIGN for Curbside Pickup Structure at Lowes.	$18,000	1,296
BU2022-01835	5/25/2022	6900 BRUTON SMITH BLVD CONCORD, NC 28027	RATZLAFF CONSTRUCTION LLC	wood framed shed ~~ ROCKY RIVER GOLF COURSE GOLF BALL WASH SHELTER	$18,000	72

Cabarrus County Commercial Building Plan Review Summary

Begin Date: 5/1/2022 through End Date: 5/31/2022

BU2022-01836	5/25/2022	8670 CONCORD MILLS BLVD CONCORD, NC 28027	McCue	SIGN for Curbside Pickup Structure at Lowes.	$18,000	1,296
BU2022-01847	5/25/2022	940 CONCORD PKWY N CONCORD, NC 28027	ATLAS SIGN INDUSTRIES OF NC LLC	INSTALL ILLUMINATED CHANNEL LETTERS (S01)	$100	84
BU2022-01857	5/26/2022	4601 CORPORATE DR NW 140 CONCORD, NC 28027	ROPER CONSTRUCTION CO (SUITE 140)	SUITE 140 UPFIT: 5191 TOTAL SQUARE FOOTAGE~1700sf OFFICE AND 3491sf WAREHOUSE~	$156,993	5,191
BU2022-01858	5/26/2022	4601 CORPORATE DR NW 145 CONCORD, NC 28027	ROPER CONSTRUCTION CO (SUITE 145)	Office Spec Suites in existing building (Suite 145)	$154,993	5,251
BU2022-01862	5/26/2022	4601 CORPORATE DR NW 165 CONCORD, NC 28027	ROPER CONSTRUCTION CO (SUITE 165)	SUITE 165 UPFIT: 10610sf TOTAL SQUARE FOOTAGE~~3500sf OFFICE AND 7110sf WAREHOUSE~	$137,193	10,610
BU2022-01863	5/26/2022	4601 CORPORATE DR NW 155 CONCORD, NC 28027	ROPER CONSTRUCTION CO., ROPER RESTORATION, INC., T/A	Office Spec Suites in existing building (Suite 155)	$137,193	10,502
BU2022-01867	5/26/2022	227 NC HWY 49 S CONCORD, NC 28025	NEW DIMENSIONS OUTDOOR SERVICES INC	Kroger Fulfillment Center~~2175 LF OF RETAINING WALLS - INSTALLATION OF (4) MECHANICALLY STABILIZED EARTH WALLS AS SPECIFIED ON SITE PLANS AS WALL NO. 1: 500 lf WALL NO. 2: 350 lf WALL NO. 3: 375 lf WALL NO. 4: 950 lf	$450,000	2,175
				Total Plans Reviewed: 59	**$36,419,835**	**667,315**

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

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.

ATTACHMENTS:

- Report

Jurisdiction	APF Base Data Subdivision	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Concord	100 CROWELL DRIVE SW TOWNHOMES	100 CROWELL DRIVE SW TOWNHOMES	APF2020-00041	JOHN SEARS	Jay M Robinson High School	Concord Middle School	W M Irvin Elementary School		Closed-Built Out	Townhouse	6/11/2021	4	4	0			0.552	0.276	0.368	1.196	0	0	0	0
Concord	171 CABARRUS	171 CABARRUS	APF2019-00026	PATRICK RILEY	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Multi Family		64	0	64			14.848	7.424	9.92	32.192	14.848	7.424	9.92	32.192
Kannapolis	200 MAIN	200 MAIN	APF2022-00020	Aaron Wagoner	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Multi Family		78	0	78			0	0	0	0	18.096	9.048	12.09	39.234
Concord	212 MCGILL AV	212 MCGILL AV	APF2021-00007	KEVIN WILLIAMS	Concord High School	Concord Middle School	Coltrane-Webb Elementary School		Pending	Single Family		10	0	10			3.84	1.93	2.56	8.33	3.84	1.93	2.56	8.33
Concord	3476 ZION CHURCH RD	3476 ZION CHURCH RD	APF2021-00008	MIKE BYRON	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending	Multi Family		216	0	216			50.112	25.056	33.48	108.648	50.112	25.056	33.48	108.648
Kannapolis	4312 TOWNHOUSES	4312 TOWNHOUSES	APF2021-00052	ARCONS DESIGN STUDIO	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Withdrawn	Townhouse		16	0	16			2.208	1.104	1.472	4.784	2.208	1.104	1.472	4.784
Concord	501 OLD SPEEDWAY DR DEVELOPMENT	501 OLD SPEEDWAY DR DEVELOPMENT	APF2021-00030	DALE FINK	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Pending	Single Family		6	0	6			2.304	1.158	1.536	4.998	2.304	1.158	1.536	4.998
Concord	557 OLD SPEEDWAY DR DEVELOPMENT	557 OLD SPEEDWAY DR DEVELOPMENT	APF2021-00031	PAUL CAMPBELL	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Pending	Townhouse		12	0	12			1.656	0.828	1.104	3.588	1.656	0.828	1.104	3.588
Concord	61 CABARRUS TOWNHOMES	61 CABARRUS TOWNHOMES	APF2017-00015	OLD TOWNE DEVELOPMENT CORPORATION	Concord High School	Concord Middle School	Coltrane-Webb Elementary School		Active Building Permitting	Townhouse	12/29/2021	2	5	-3			0.828	0.414	0.552	1.794	-0.414	-0.207	-0.276	-0.897
Kannapolis	ABBERLY KANNAPOLIS	ABBERLY KANNAPOLIS	APF2022-00040	ABBERLY	Cox Mill High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		277	0	277			0	0	0	0	64.264	32.132	42.935	139.331
Harrisburg	ABBINGTON PLACE	ABBINGTON PLACE	APF2008-00040	AVANTI PROPERTIES	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	9/7/2021	395	331	64		12/30/2015	151.68	76.235	101.12	329.035	24.576	12.352	16.384	53.312
Kannapolis	ADAIR WOODS	ADAIR WOODS	APF2020-00015	SHERWOOD DEVELOPMENT GROUP	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Sketch	Single Family		157	0	157			60.288	30.301	40.192	130.781	60.288	30.301	40.192	130.781
Concord	ADDISON FIFTEEN20	ADDISON EIGHTY50	APF2019-00007	SCOTT KIGER	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Active Building Permitting	Multi Family		340	0	340			0.928	0.464	0.62	2.012	78.88	39.44	52.7	171.02
Harrisburg	ADDISON PARK	ADDISON PARK	APF2016-00013	ATX LLC A NC LLC	Hickory Ridge High School	Hickory Ridge Middle School			Construction Drawing Review	Age Restricted	6/2/2022	55	50	5			0	0	0	0	0	0	0	0
Kannapolis	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
Midland	ALBEMARLE ROAD SITE	ALBEMARLE ROAD SITE	APF2021-00023	ESP ASSOCIATES INC	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Construction Drawing Review	Single Family		1216	0	1,216			503.04	252.83	335.36	1091.23	466.944	234.688	311.296	1012.928
Cabarrus County	ALEXANDER ESTATES	ALEXANDER ESTATES	APF2008-00035	BRIAN HUNTLEY	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Expired	Single Family	10/15/2021	19	4	15			7.296	3.667	4.864	15.827	5.76	2.895	3.84	12.495
Harrisburg	ALLBURN	ALLBURN	APF2017-00008	GeoScience Group	Hickory Ridge High School	J N Fries Middle School	Pitt School Road Elementary School		Construction Drawing Review	Single Family		58	0	58			23.04	11.58	15.36	49.98	22.272	11.194	14.848	48.314
Concord	ALLEN FARM SUBDIVISION	ALLEN FARM SUBDIVISION	APF2008-00058	MIKE SHEA	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	Single Family	5/5/2022	466	462	4	11/20/2007		178.944	89.938	119.296	388.178	1.536	0.772	1.024	3.332
Concord	ANNSBOROUGH PARK	ANNSBOROUGH PARK	APF2019-00010	CHAD LLOYD	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Single Family		300	0	300			0	0	0	0	115.2	57.9	76.8	249.9
Concord	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	APF2008-00138	KSIN PROPERTIES, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		All Lots Platted	Single Family	10/14/2021	20	12	8	10/21/2002		7.68	3.86	5.12	16.66	3.072	1.544	2.048	6.664
Concord	ARCHIBALD ROAD SUBVISION	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	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	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
Kannapolis	ARGENTO AT KELLSWATER BRIDGE	Argento at Kellswater Bridge	APF2022-00028	CESI	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		270	0	270			62.64	31.32	41.85	135.81	62.64	31.32	41.85	135.81
Cabarrus County	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	AUBURN WOODS	AUBURN WOODS	APF2013-00007	FIFTH THIRD BANK	Concord High School	Concord Middle School	Royal Oaks Elementary School		Inactive	Single Family	5/31/2022	256	1	255	4/22/2002		98.304	49.408	65.536	213.248	97.92	49.215	65.28	212.415
Kannapolis	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
Concord	AUSTIN FARMS	AUSTIN FARMS	APF2021-00046	MATT LANGSTON	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Pending	Single Family		102	0	102			39.168	19.686	26.112	84.966	39.168	19.686	26.112	84.966
Kannapolis	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	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		87	0	87	8/20/2014		20.184	10.092	13.485	43.761	20.184	10.092	13.485	43.761
Harrisburg	AUTUMN GLEN AT MOREHEAD	AUTUMN GLEN AT MOREHEAD	APF2016-00011	ELLEDGE JACK L	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Void	Single Family		150	0	150			57.6	28.95	38.4	124.95	57.6	28.95	38.4	124.95
Harrisburg	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	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	AZALEA ESTATES	AZALEA ESTATES	APF2008-00140	James M Hood	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff 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
Kannapolis	BAKERS CREEK - SFA	BAKERS CREEK - SFA	APF2022-00016	Salman Moazzam	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Single Family		122	0	122			0	0	0	0	46.848	23.546	31.232	101.626
Kannapolis	BAKERS CREEK - SFD	BAKERS CREEK - SFD	APF2022-00006	Salman Moazzam	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Single Family		228	0	228			87.552	44.004	58.368	189.924	87.552	44.004	58.368	189.924
Mt. Pleasant	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	BECKENHAM	BECKENHAM	APF2008-00029	Charles F McDonald	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		Active Platting	Single Family	4/22/2022	20	13	7	2/15/2007	2/15/2013	7.68	3.86	5.12	16.66	2.688	1.351	1.792	5.831
Concord	BEDFORD FARMS	BEDFORD FARMS	APF2008-00042	Niblock Development Corporation	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Active (platting & permitting)	Single Family	8/12/2021	166	168	-2	7/18/2006	3/18/2016	63.744	32.038	42.496	138.278	-0.768	-0.386	-0.512	-1.666
Concord	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		Closed-Built Out	Multi Family		80	0	80			18.56	9.28	12.4	40.24	18.56	9.28	12.4	40.24
Concord	BELVEDERE TOWNS	BELVEDERE TOWNS	APF2017-00012	WINDSWEPT FARMS LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Townhouse		39	0	39			5.382	2.691	3.588	11.661	5.382	2.691	3.588	11.661
Kannapolis	BELWOOD PLACE	BELWOOD PLACE	APF2022-00029	JSOHUA MASTERS	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Active Building Permitting	Single Family		10	0	10			3.84	1.93	2.56	8.33	3.84	1.93	2.56	8.33
Midland	BETHEL GLEN	BETHEL GLEN	APF2008-00141	TL HARRELL LAND DEVELOPMENT	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Closed-Built Out	Single Family	4/8/2021	191	169	22	10/16/2000		74.112	37.249	49.408	160.769	8.448	4.246	5.632	18.326
Concord	BILLINGS PROPERTY	BILLINGS PROPERTY	APF2019-00027	EDWIN SUDDRETH	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Townhouse		58	0	58			8.004	4.002	5.336	17.342	8.004	4.002	5.336	17.342
Concord	BIRCHWOOD COMMONS	BIRCHWOOD COMMONS	APF2014-00007	COOK FAMILY PARTNERSHIP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Closed-Built Out	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	BLACKWELDER SUBDIVISION	BLACKWELDER SUBDIVISION	APF2020-00004	SOUTH FORK VENTURES LLC	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Denied	Single Family		71	0	71			27.264	13.703	18.176	59.143	27.264	13.703	18.176	59.143
Locust	BLUFFTON PARK	BLUFFTON PARK	APF2020-00003	GUS SCHAD	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Closed-Built Out	Single Family	4/21/2021	15	7	8			5.76	2.895	3.84	12.495	3.072	1.544	2.048	6.664
Harrisburg	BLUME ESTATES	BLUME ESTATES	APF2022-00039	DPR Associates	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Pending	Single Family		30	0	30			11.52	5.79	7.68	24.99	11.52	5.79	7.68	24.99
Harrisburg	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		Closed-Built Out	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	BRANCHVIEW TOWNHOMES	BRANCHVIEW TOWNHOMES	APF2022-00037	TIA CARDINE	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			5	0	5			0	0	0	0	1.16	0.58	0.775	2.515
Concord	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	Single Family	6/17/2008	321	322	-1	11/18/2002		123.264	61.953	82.176	267.393	-0.384	-0.193	-0.256	-0.833
Kannapolis	BRANTLEY CREEK	BRANTLEY CREEK	APF2014-00014	UNKNOWN	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School		All Lots Platted	Single Family	1/28/2022	74	65	9	5/5/1999		28.416	14.282	18.944	61.642	3.456	1.737	2.304	7.497
Kannapolis	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	BREAKWATER HIGHWAY 601	BREAKWATER HIGHWAY 601	APF2020-00012	TOM MCCLELLAN	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		Pending	Townhouse		332	0	332			45.816	22.908	30.544	99.268	45.816	22.908	30.544	99.268
Concord	BREAKWATER SUNVIEW	BREAKWATER SUNVIEW	APF2020-00011	BLOC DESIGN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Beverly Hills Elementary School		Pending	Townhouse		148	0	148			20.424	10.212	13.616	44.252	20.424	10.212	13.616	44.252
Harrisburg	BRIDGE POINTE	BRIDGE POINTE	APF2008-00039	BILL WHITLEY	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	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	BRIDGE POINTE PHASE 6	BRIDGE POINTE PHASE 6	APF2008-00174	Ric Killian	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	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	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	22.32	72.432	0	0	0	0
Mt. Pleasant	BRIGHTON PARK	BRIGHTON PARK	APF2022-00011	NIBLOCK HOMES	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Construction Drawing Review	Single Family		178	0	178			68.352	34.354	45.568	148.274	68.352	34.354	45.568	148.274
Harrisburg	BROOKDALE COMMONS	BROOKDALE COMMONS	APF2012-00001	Stephen Pace	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Single Family	8/3/2015	230	230	0		6/25/2016	88.32	44.39	58.88	191.59	0	0	0	0
Harrisburg	BROOKDALE VILLAGE	BROOKDALE VILLAGE	APF2008-00032	EVOLVE CONSTRUCTION LLC	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active Platting	Townhouse	10/15/2013	72	1	71	9/12/2016	9/12/2018	9.936	4.968	6.624	21.528	9.798	4.899	6.532	21.229

Jurisdiction	APF Base Subdivision Data	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Concord	BROOKE POINTE MANOR RETIREMENT COMMUNITY	BROOKE POINTE MANOR RETIREMENT COMMUNITY	APF2011-00002	CATHERINE F. CONNORS	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Closed-Built Out	Age Restricted		66	0	66	12/20/2011		0	0	0	0	0	0	0	0
Concord	BROOKVUE	BROOKVUE	APF2008-00056	BROOKVUE	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	5/4/2017	342	261	81	10/20/2009	12/31/2015	131.328	66.006	87.552	284.886	31.104	15.633	20.736	67.473
Concord	BROWN MILL LOFTS	BROWN MILL LOFTS	APF2016-00015	Mark T. Wright	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending	Multi Family		131	0	131			30.392	15.196	20.305	65.893	30.392	15.196	20.305	65.893
Kannapolis	BRYNDALL RESERVES	Bryndall Reserves Preliminary Plat	APF2022-00025	Jeremy Horton	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Single Family		63	0	63			24.192	12.159	16.128	52.479	24.192	12.159	16.128	52.479
Concord	BUFFALO TERRACE	BUFFALO TERRACE	APF2017-00013	TROUTMAN LAND INVESTMENTS INC	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Withdrawn	Multi Family		80	0	80			18.56	9.28	12.4	40.24	18.56	9.28	12.4	40.24
Concord	BUFFALO TERRACE APARTMENTS	BUFFALO TERRACE APARTMENTS	APF2019-00035	Steve Schlegelmilch	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Active Building Permitting	Multi Family		78	0	78			18.096	9.048	12.09	39.234	18.096	9.048	12.09	39.234
Cabarrus County	BURNT MILL	BURNT MILL	APF2008-00127	GRACE M MYNATT	Concord High School	Concord Middle School	W M Irvin Elementary School		Expired	Single Family		25	0	25			9.6	4.825	6.4	20.825	9.6	4.825	6.4	20.825
Cabarrus County	CABARRUS CROSSING	CABARRUS CROSSING	APF2008-00089	STEVEN MOORE	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	3/24/2006	290	286	4	8/21/2001		111.36	55.97	74.24	241.57	1.536	0.772	1.024	3.332
Concord	CABARRUS HOMES DUPLEX AND TRIPLEX DEVELOPMENT	CABARRUS HOMES DUPLEX AND TRIPLEX DEVELOPMENT	APF2018-00021	JOSEPH TAYLOR	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Multi Family	11/30/2021	20	4	16			4.64	2.32	3.1	10.06	3.712	1.856	2.48	8.048
Concord	CALAMAR SETTLER'S LANDING	CALAMAR SETTLER'S LANDING	APF2019-00025	DAVE BRAUN	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Pending	Age Restricted		134	0	134			0	0	0	0	0	0	0	0
Harrisburg	CALDWELL COMMONS	CALDWELL COMMONS	APF2011-00001	CROSLAND CALDWELL COMMONS LLC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		All Lots Platted	Single Family	6/10/2015	9	4	5			3.456	1.737	2.304	7.497	1.92	0.965	1.28	4.165
Harrisburg	CALDWELL TOWNHOMES	CALDWELL TOWNHOMES	APF2017-00007	Marc Houle	Hickory Ridge High School	C C Griffin Middle School	Harrisburg Elementary School		Active Platting	Townhouse	4/23/2021	68	66	2			9.384	4.692	6.256	20.332	0.276	0.138	0.184	0.598
Harrisburg	CALLOWAY	CALLOWAY	APF2017-00040	ESSEX HOMES	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Construction Drawing Review	Age Restricted		84	0	84			0	0	0	0	0	0	0	0
Concord	CAMBRIDGE CORNERS TOWNHOMES	CAMBRIDGE CORNERS TOWNHOMES	APF2019-00009	BOB DAVIS	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		Pending	Townhouse		190	0	190			0	0	0	0	26.22	13.11	17.48	56.81
Harrisburg	CAMELLIA GARDENS	CAMELLIA GARDENS	APF2018-00030	ASSOCIATES	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Construction Drawing Review	Single Family		95	0	95			36.48	18.335	24.32	79.135	36.48	18.335	24.32	79.135
Concord	CAMPBELL FAMILY FARM	CAMPBELL FAMILY FARM	APF2016-00018	Patricia J Molander	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Active Building Permitting	Single Family	3/1/2022	140	136	4			53.76	27.02	35.84	116.62	1.536	0.772	1.024	3.332
Concord	CANNON CROSSING	CANNON CROSSING	APF2008-00036	RHEIN INTEREST OF CHARLOTTE, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	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
Kannapolis	CANNON MANOR	CANNON MANOR	APF2020-00017	KIMLEY HORN	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse		74	0	74			0	0	0	0	10.212	5.106	6.808	22.126
Concord	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	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	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
Concord	CAPITAL LAND PARTNERS	CAPITAL LAND PARTNERS	APF2019-00013	PAUL CAMPBELL	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Single Family		112	0	112			11.52	5.79	7.68	24.99	43.008	21.616	28.672	93.296
Concord	CAROLINA LILY APARTMENTS	CAROLINA LILY APARTMENTS	APF2017-00017	PALISADES PROPERTIES INC	Cox Mill High School	Harris Road Middle School	Carl A Furr Elementary School		Pending	Multi Family		182	0	182			42.224	21.112	28.21	91.546	42.224	21.112	28.21	91.546
Kannapolis	CAROLINA SITE ACQUISITIONS	CAROLINA SITE ACQUISITIONS	APF2021-00005	HUNTER OGLESBY	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		294	0	294			68.208	34.104	45.57	147.882	68.208	34.104	45.57	147.882
Harrisburg	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	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
Cabarrus County	CASCADES MULTI-FAMILY	CASCADES MULTI-FAMILY	APF2021-00056	BRETN COWAN	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending			100	0	100			0	0	0	0	23.2	11.6	15.5	50.3
Kannapolis	CASTLEBROOKE MANOR	CASTLEBROOK MANOR	APF2008-00121	jim a brodnik	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (platting & 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
Kannapolis	CAVALLARO RIDGE	CAVALLARO RIDGE	APF2021-00048	WK DICKSON	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Void	Single Family		82	0	82			31.488	15.826	20.992	68.306	31.488	15.826	20.992	68.306
Kannapolis	CAVALLARO RIDGE	Cavallaro Ridge Subdivision	APF2022-00026	Jeremy Horton	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family		82	0	82			0	0	0	0	31.488	15.826	20.992	68.306
Concord	CEDAR ST DEVELOPMENT	CEDAR ST DEVELOPMENT	APF2022-00036	GINGER MOORE	Concord High School	Concord Middle School	Coltrane-Webb Elementary School		Pending			15	0	15			0	0	0	0	3.48	1.74	2.325	7.545
Cabarrus County	CEDARVALE FARM	CEDARVALE FARM	APF2008-00120	PIONEER MILL(CHARLOTTE) AIP IV, LLP	Hickory Ridge High School	Hickory Ridge Middle School	Bethel Elementary School		Active (platting & permitting)	Single Family	2/12/2021	363	288	75	1/20/2005	10/8/2012	139.392	70.059	92.928	302.379	28.8	14.475	19.2	62.475
Concord	CEDARWOOD TOWNHOMES	CEDARWOOD TOWNHOMES	APF2020-00028	ROBERT W NIXON	Concord High School	Concord Middle School	R Brown McAllister Elementary School		Pending	Townhouse		7	0	7			0.966	0.483	0.644	2.093	0.966	0.483	0.644	2.093
Concord	CENTRAL HEIGHTS SUBDIVISION	CENTRAL HEIGHTS SUBDIVISION	APF2021-00021	ANDREW GRANT	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending	Single Family		59	0	59			22.656	11.387	15.104	49.147	22.656	11.387	15.104	49.147
Kannapolis	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	CHILDERS PARK AT BUFFALO CREEK - SFD	CHILDERS PARK AT BUFFALO CREEK - SFA	D	AMERICAN ENGINEERING	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Void	Single Family		92	0	92			35.328	17.756	23.552	76.636	35.328	17.756	23.552	76.636
Kannapolis	CHILDERS PARK AT BUFFALO CREEK - SFA	CHILDERS PARK AT BUFFALO CREEK - SFA	APF2021-00017	AMERICAN ENGINEERING	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Townhouse		181	0	181			24.978	12.489	16.652	54.119	24.978	12.489	16.652	54.119
Kannapolis	CHILDERS PARK AT BUFFALO CREEK - SFD	CHILDERS PARK AT BUFFALO CREEK - SFD	APF2021-00018	AMERICAN ENGINEERING	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Single Family		92	0	92			35.328	17.756	23.552	76.636	35.328	17.756	23.552	76.636
Concord	CHRISTENBURY COMMONS - MULTI-FAMILY	CHRISTENBURY COMMONS - MULTI-FAMILY	APF2019-00005	JUSTIN MUELLER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Construction Drawing Review	Multi Family		268	0	268			62.176	31.088	41.54	134.804	62.176	31.088	41.54	134.804
Concord	CHRISTENBURY COMMONS - TOWNHOMES	CHRISTENBURY COMMONS - TOWNHOMES	APF2019-00004	JUSTIN MUELLER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Construction Drawing Review	Townhouse		63	0	63			11.316	5.658	7.544	24.518	8.694	4.347	5.796	18.837
Concord	CHRISTENBURY VILLAGE	CHRISTENBURY VILLAGE	APF2008-00062	Scott H. Binder	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	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	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	APF2021-00003	AUSTIN HUGHES	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse		79	0	79			10.902	5.451	7.268	23.621	10.902	5.451	7.268	23.621
Harrisburg	CHURCHILL FARMS	CHURCHILL FARMS	APF2014-00001	Meritage Homes	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	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	CODDLE CREEK	CODDLE CREEK	APF2018-00005	REO FUNDING SOLUTIONS III LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Multi Family		425	0	425			98.6	49.3	65.875	213.775	98.6	49.3	65.875	213.775
Kannapolis	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
Kannapolis	COLDWATER RIDGE APT II	Coldwater Ridge Apartments II	APF2022-00030	Matt Raab	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending	Multi Family		72	0	72			0	0	0	0	16.704	8.352	11.16	36.216
Concord	COLEMAN MILL APARTMENTS	COLEMAN MILL APARTMENTS	APF2021-00015	NATHAN LORD	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Construction Drawing Review	Multi Family		152	0	152			35.264	17.632	23.56	76.456	35.264	17.632	23.56	76.456
Cabarrus County	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
Harrisburg	FARMINGTON PATIO HOMES	COMMONS AT FARMINGTON	APF2017-00011	ROCKY RIVER ROAD ASSOC LLC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Construction Drawing Review	Single Family		50	0	50			19.2	9.65	12.8	41.65	19.2	9.65	12.8	41.65
Concord	CONCORD ELEVATION TOWNHOMES	CONCORD ELEVATION TOWNHOMES	APF2021-00013	PETER DAY	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending	Townhouse		30	0	30			4.14	2.07	2.76	8.97	4.14	2.07	2.76	8.97
Concord	LAURELVIEW APARTMENTS	CONCORD HEIGHTS	APF2017-00028	THOMAS GROUP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Closed-Built Out	Multi Family		174	0	174			40.368	20.184	26.97	87.522	40.368	20.184	26.97	87.522
Concord	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		Active Building Permitting	Multi Family	12/2/2021	336	312	24			77.952	38.976	52.08	169.008	5.568	2.784	3.72	12.072

Jurisdiction	APF Base Data Subdivision	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Concord	CONCORD RIDGE	CONCORD RIDGE	APF2008-00185	Robert Nixon	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Closed-Built Out	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	CONCORD SENIOR AND FAMILY PROJECT	CONCORD SENIOR AND FAMILY PROJECT	APF2020-00026	MATT MANDLE	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Multi Family		409	0	409			94.888	47.444	63.395	205.727	94.888	47.444	63.395	205.727
Concord	COPPERFIELD APARTMENTS	COPPERFIELD APARTMENTS	APF2016-00021	SYCAMORE DEVELOPMENT LLC	Concord High School	Concord Middle School	Beverly Hills Elementary School		Closed-Built Out	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	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
Concord	CORBAN AVE MIXED USE	CORBAN AVE MIXED USE	APF2021-00040	GINGER MOORE	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Multi Family		10	0	10			2.32	1.16	1.55	5.03	2.32	1.16	1.55	5.03
Kannapolis	COTTAGE COVE PARK	COTTAGE COVE PARK	APF2008-00153	NO APPLICANT					Void	Single Family		0	0	0			0	0	0	0	0	0	0	0
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		Closed-Built Out	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	APF2015-00003	ADAM FIORENZA	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	Age Restricted		24	0	24			0	0	0	0	0	0	0	0
Harrisburg	COURTYARDS AT HARRISBURG PHASE II	COURTYARDS AT HARRISBURG PHASE III	APF2017-00003	NEWSTYLE COMMUNITIES	Hickory Ridge High School	C C Griffin Middle School	Harrisburg Elementary School		Closed-Built Out	Age Restricted	10/23/2019	4	4	0			1.536	0.772	1.024	3.332	0	0	0	0
Concord	COURTYARDS AT POPLAR TENT	COURTYARDS AT POPLAR TENT	APF2016-00019	Fred Matrulli	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active Building Permitting	Single Family		93	0	93			35.712	17.949	23.808	77.469	35.712	17.949	23.808	77.469
Harrisburg	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	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
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	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	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	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	Crystal Creek Phase 2	CRYSTAL CREEK PHASE 2	APF2009-00010	CRYSTAL CREEK	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Void	Single Family		226	0	226		12/31/2013	86.784	43.618	57.856	188.258	86.784	43.618	57.856	188.258
Concord	CUMBERLAND	CUMBERLAND	APF2019-00033	WILLIAM NIBLOCK	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active Platting	Single Family	5/23/2022	142	8	134			54.528	27.406	36.352	118.286	51.456	25.862	34.304	111.622
Concord	CYPRESS VILLAGE	CYPRESS VILLAGE	APF2020-00023	PAMELA BROOKS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active Building Permitting	Multi Family	1/7/2022	85	49	36			19.72	9.86	13.175	42.755	8.352	4.176	5.58	18.108
Concord	9339 DAVIDSON HIGHWAY TOWNHOMES	CYPRESS VILLAGE	APF2015-00007	TRITT HARLEY D AND	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Void	Townhouse		100	0	100			13.8	6.9	9.2	29.9	13.8	6.9	9.2	29.9
Kannapolis	CZ-2020-07	CZ-2020-07	APF2020-00025	KIMLEY-HORN & ASSOCIATES	Concord High School	Concord Middle School	Royal Oaks Elementary School		Void	Multi Family		270	0	270			62.64	31.32	41.85	135.81	62.64	31.32	41.85	135.81
Concord	DALTON WOODS	DALTON WOODS	APF2017-00043	CHRIS MCINTYRE	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Active Building Permitting	Single Family	2/7/2022	35	33	2			9.984	5.018	6.656	21.658	0.768	0.386	0.512	1.666
Concord	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 APARTMENTS	DAVIDSON APARTMENTS	APF2021-00034	VAMSHEEDHAR DEVARISHATI	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		114	0	114			26.448	13.224	17.67	57.342	26.448	13.224	17.67	57.342
Concord	DAVIDSON HIGHWAY TOWNS	DAVIDSON HIGHWAY TOWNS	APF2021-00019	AUSTIN HUGHES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Approved	Townhouse		169	0	169			23.322	11.661	15.548	50.531	23.322	11.661	15.548	50.531
Harrisburg	DAVIS CREEK	DAVIS CREEK	APF2017-00047	ANDREW STRONG	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Active (platting & permitting)	Age Restricted		48	0	48			0	0	0	0	0	0	0	0
Midland	DEER RUN	DEER RUN	APF2008-00181	David Eudy	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Inactive	Single Family	9/26/2019	33	25	8	6/3/2008	12/31/2012	22.656	11.387	15.104	49.147	3.072	1.544	2.048	6.664
Concord	DILEEN DRIVE SUBDIVISION	DILEEN DRIVE SUBDIVISION	APF2017-00031	BLUE PURE LIFE LLC	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending	Single Family		90	0	90			34.56	17.37	23.04	74.97	34.56	17.37	23.04	74.97
Concord	DOUGLAS AVENUE TOWNHOMES	DOUGLAS AVENUE TOWNHOMES	APF2019-00003	DOOBAY SANGSTER	Concord High School	Concord Middle School	Coltrane-Webb Elementary School		Construction Drawing Review	Townhouse		11	0	11			1.518	0.759	1.012	3.289	1.518	0.759	1.012	3.289
Harrisburg	DR HORTON LOWER ROCKY RIVER	DR HORTON LOWER ROCKY RIVER	APF2016-00010	DR HORTON	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Void	Single Family		458	0	458			175.872	88.394	117.248	381.514	175.872	88.394	117.248	381.514
Concord	DREAMING CREEK SINGLE FAMILY	DREAMING CREEK SINGLE FAMILY	APF2019-00018	EDDIE MOORE	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Void	Single Family		90	0	90			0	0	0	0	34.56	17.37	23.04	74.97
Concord	DREAMING CREEK TOWNHOMES	DREAMING CREEK TOWNHOMES	APF2019-00017	EDDIE MOORE	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Void	Townhouse		64	0	64			0	0	0	0	8.832	4.416	5.888	19.136
Concord	DULIN TOWNNOMES	DULIN TOWNNOMES	APF2021-00012	AIMY STEELE	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending	Townhouse		16	0	16			2.208	1.104	1.472	4.784	2.208	1.104	1.472	4.784
Kannapolis	E 26TH STREET KANNAPOLIS	E 26TH STREET KANNAPOLIS	APF2022-00027	PRESPRO	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Townhouse		4	0	4			0.552	0.276	0.368	1.196	0.552	0.276	0.368	1.196
Midland	EDEN ROCK	EDEN ROCK	APF2008-00155	LEONARD STOGNER	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Closed-Built Out	Single Family	11/15/2006	5	5	0			1.92	0.965	1.28	4.165	0	0	0	0
Concord	EDENTON AT COX MILL	EDENTON AT COX MILL	APF2016-00006	HOOKS BEVERLY D	Cox Mill High School	Harris Road Middle School	Bethel Elementary School		Closed-Built Out	Single Family	12/8/2020	106	17	89			40.704	20.458	27.136	88.298	34.176	17.177	22.784	74.137
Concord	EDISON SQUARE	EDISON SQUARE	APF2008-00183	Mike Shea	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	Townhouse	5/8/2018	168	156	12	6/20/2006	3/18/2016	23.184	11.592	15.456	50.232	1.656	0.828	1.104	3.588
Kannapolis	ELIZABETH OAKS	Elizabeth Oaks	APF2022-00031	Frances Yarbrough	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School		Pending	Single Family		32	0	32			12.288	6.176	8.192	26.656	12.288	6.176	8.192	26.656
Harrisburg	ELLEDGE MOREHEAD ROAD SUBDIVISION	ELLEDGE MOREHEAD ROAD SUBDIVISION	APF2016-00009	ELLEDGE JACK L	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Void	Single Family		181	0	181			69.504	34.933	46.336	150.773	69.504	34.933	46.336	150.773
Concord	ELLENWOOD PARK	ELLENWOOD PLAN	APF2018-00007	PETE ELMER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	Townhouse		35	0	35			4.83	2.415	3.22	10.465	4.83	2.415	3.22	10.465
Concord	ELLENWOOD TOWNHOMES	ELLENWOOD TOWNHOMES	APF2021-00001	ROBERT FROST	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Townhouse		91	0	91			12.558	6.279	8.372	27.209	12.558	6.279	8.372	27.209
Concord	ELLIE COURT	ELLIE COURT	APF2017-00025	PRESPRO	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending	Single Family		94	0	94			44.544	22.388	29.696	96.628	36.096	18.142	24.064	78.302
Kannapolis	ELOISE B FREEZE (ROWAN)	ELOISE B FREEZE (ROWAN)	APF2018-00001	ELOISE B FREEZE	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School		Pending	Single Family		6	0	6			2.304	1.158	1.536	4.998	2.304	1.158	1.536	4.998
Kannapolis	EMERSON GLEN	EMERSON GLEN	APF2022-00002	Jeremy Horton	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Single Family		86	0	86			0	0	0	0	33.024	16.598	22.016	71.638
Concord	EMERY VILLAGE APARTMENTS	EMERY VILLAGE APARTMENTS	APF2018-00006	LOUKOS CHRISTOPHER A	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Active Building Permitting	Multi Family	6/16/2020	90	132	-42			20.88	10.44	13.95	45.27	-9.744	-4.872	-6.51	-21.126
Concord	ERVIN	ERVIN PROPERTY	APF2020-00034	MATT MANDLE	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending	Townhouse		88	0	88			12.144	6.072	8.096	26.312	12.144	6.072	8.096	26.312
Concord	EUDY CONSTRUCTION	EUDY CONSTRUCTION	APF2017-00037	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 RIDGE	FARMINGTON RIDGE	APF2008-00095	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	FENTON DELL	FENTON DELL	APF2008-00080	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	FENTON DELL PHASES 2 & 3	APF2008-00173	Little	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	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	FIELDSTONE	APF2008-00086	DAVID MCDONALD	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		All Lots Platted	Single Family	8/19/2021	108	89	19	1/20/2005		41.472	20.844	27.648	89.964	7.296	3.667	4.864	15.827
Concord	FLOWES STORE ROAD SFD	FLOWES STORE ROAD SFD	APF2021-00028	CHRIS TODD	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending	Single Family		210	0	210			80.64	40.53	53.76	174.93	80.64	40.53	53.76	174.93
Concord	FLOWES-ZION CONCEPTUAL SITE PLAN SFD	FLOWES-ZION CONCEPTUAL SITE PLAN SFD	APF2019-00030	MARK EISENBEIS	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending	Single Family		382	0	382			146.688	73.726	97.792	318.206	146.688	73.726	97.792	318.206
Concord	FLOWES-ZION CONCEPTUAL SITE PLAN TH	FLOWES-ZION CONCEPTUAL SITE PLAN TH	APF2019-00031	MARK EISENBEIS	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Pending	Single Family		221	0	221			84.864	42.653	56.576	184.093	84.864	42.653	56.576	184.093
Kannapolis	FOREST PARK CROSSING	FOREST PARK CROSSING	APF2010-00005	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

Jurisdiction	APF Base Subdivision Data	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Harrisburg	FOUNDERS RESERVE	FOUNDERS RESERVE	APF2008-00131	PARK STONE WEST, LLC	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Active Building Permitting	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	FOUNDERS RESERVE PHASE 2	APF2014-00006	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	FOX CREEK	APF2017-00001	B & C Land Holdings	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Closed-Built Out	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	FRANCES HAVEN	APF2008-00038	ALBIZA FORTUNE BUILDERS INC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Closed-Built Out	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	FRAZIER ACRES	APF2008-00156	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	FULLERTON PLACE	FULLERTON PLACE	APF2008-00052	LENNAR CAROLINAS, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	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	GENE CT SUBDIVISION	GENE CT SUBDIVISION	APF2021-00020	KATE UNDERWOOD	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			13	0	13			0	0	0	0	3.016	1.508	2.015	6.539
Concord	GENISIS CONSTRUCTION	GENISIS CONSTRUCTION	APF2021-00059	KEVIN WILLIAMS	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School		Pending	Townhouse		120	0	120			16.56	8.28	11.04	35.88	16.56	8.28	11.04	35.88
Concord	GEORGE LILES RESIDENTIAL	GEORGE LILES RESIDENTIAL	APF2021-00016	KATIE BRADLEY	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending	Multi Family		120	0	120			27.84	13.92	18.6	60.36	27.84	13.92	18.6	60.36
Kannapolis	GEOREGETOWN CROSSINGS	GEORGETOWN CROSSINGS	APF2020-00038	REID OWEN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Townhouse		150	0	150			20.7	10.35	13.8	44.85	20.7	10.35	13.8	44.85
Cabarrus County	GLEN LAUREL	GLEN LAUREL	APF2008-00157	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	GLENGROVE	APF2008-00050	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	GLENWOOD AT THE VILLAGE OF RED BRIDGE	APF2008-00172	Mark Friedman	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Approved	Townhouse	6/1/2022	741	6	735	3/1/2005		102.258	51.129	68.172	221.559	101.43	50.715	67.62	219.765
Concord	GOODMAN HEIGHTS TOWNHOMES	GOODMAN HEIGHTS TOWNHOMES	APF2021-00037	STEVEN SINGLETON	Jay M Robinson High School	Concord Middle School	Wolf Meadow Elementary School		Pending	Townhouse		287	0	287			39.606	19.803	26.404	85.813	39.606	19.803	26.404	85.813
Kannapolis	GRACE'S RESERVE	GRACE'S RESERVE	APF2016-00025	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	GRANARY OAKS	APF2017-00006	Rick Jasinski	Northwest Cabarrus High School	Harris Road Middle School	Cox Mill Elementary School		Active Building Permitting	Single Family	3/10/2022	229	55	174			87.936	44.197	58.624	190.757	66.816	33.582	44.544	144.942
Kannapolis	GRAND SABANA	GRAND SABANA	APF2008-00184	Ejlali 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	GRANTHAM	APF2015-00001	SOUTH CABARRUS CORPORATION	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active (platting & permitting)	Single Family	3/31/2021	275	181	94			105.6	53.075	70.4	229.075	36.096	18.142	24.064	78.302
Mt. Pleasant	GREEN ACRES	GREEN ACRES	APF2017-00030	GREEN ACRES REALTY LLC A NCLLC	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Construction Drawing Review	Single Family		37	0	37			14.592	7.334	9.728	31.654	14.208	7.141	9.472	30.821
Kannapolis	GREEN VIEW APARTMENTS	GREEN VIEW APARTMENTS	APF2021-00006	JAMES A FISHER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		126	0	126			29.232	14.616	19.53	63.378	29.232	14.616	19.53	63.378
Concord	HACKBERRY PLACE	HACKBERRY PLACE	APF2008-00100	RICHARD GOODMAN	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Closed-Built Out	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	HALLSTEAD	APF2008-00113	CROSLAND LAND	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Closed-Built Out	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	HAMILTON CREST	APF2008-00163	Terry Bluto	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	2/28/2022	55	50	5	3/26/2001		21.12	10.615	14.08	45.815	1.92	0.965	1.28	4.165
Concord	HAMPDEN VILLAGE	HAMPDEN VILLAGE	APF2008-00053	METRO DEVELOPMENT GROUP, LLC	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School		Closed-Built Out	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	HANNAH'S MEADOW	HANNAH'S MEADOW	APF2017-00034	MATTHEW McWILLIAMS	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Pending	Single Family		29	0	29			11.136	5.597	7.424	24.157	11.136	5.597	7.424	24.157
Concord	HARRIS ROAD SFD SUBDIVISION	HARRIS ROAD SFD SUBDIVISION	APF2017-00036	DONALD EDWARD	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Townhouse		21	0	21			12.42	6.21	8.28	26.91	2.898	1.449	1.932	6.279
Harrisburg	HARRISBURG HEIGHTS	HARRISBURG HEIGHTS	APF2015-00006	LAMBERT RHONDA A	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Void	Age Restricted		62	0	62			0	0	0	0	0	0	0	0
Harrisburg	HARRISBURG LANDING TOWNHOMES	HARRISBURG LANDING TOWNHOMES	APF2022-00013	HENSON FOLEY	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Active (platting & permitting)	Multi Family		15	0	15			3.48	1.74	2.325	7.545	3.48	1.74	2.325	7.545
Harrisburg	HARRISBURG TOWN CENTER	HARRISBURG TOWN CENTER	APF2008-00165	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	HARRISBURG VILLAGE SINGLE FAMILY	APF2016-00003	LAMBERT RHONDA A	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Construction Drawing Review	Single Family	2/25/2022	51	18	33			19.584	9.843	13.056	42.483	12.672	6.369	8.448	27.489
Harrisburg	HARRISBURG VILLAGE TOWNHOMES	HARRISBURG VILLAGE TOWNHOMES	APF2016-00002	LAMBERT RHONDA A	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Active Platting	Townhouse	5/31/2022	207	78	129			28.566	14.283	19.044	61.893	17.802	8.901	11.868	38.571
Concord	HAVEN AT ROCKY RIVER	HAVEN AT ROCKY RIVER	APF2015-00009	LICARI JOHN MARSHALL	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Active Building Permitting	Single Family	5/25/2022	140	95	45			53.76	27.02	35.84	116.62	17.28	8.685	11.52	37.485
Concord	HAVENBROOK	HAVENBROOK	APF2008-00046	unkown	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	HAWICK COMMONS	APF2008-00166	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	HAWKS RIDGE	APF2008-00055	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	HAWTHORNE	APF2008-00130	KEVIN HALL, PE	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Closed-Built Out	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	HAWTHRONE AT THE GLEN	APF2016-00022	JACO PROPERTIES INC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	Multi Family		224	0	224			51.968	25.984	34.72	112.672	51.968	25.984	34.72	112.672
Concord	HEARTHWOOD	HEARTHWOOD	APF2008-00051	UNKNOWN	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Closed-Built Out	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	HEATHERSTONE	APF2008-00082	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	MATTAMY CAROLINA CORPORATION	HEDGECLIFF TOWNS	APF2021-00058	BRIAN JOHNSON	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending	Single Family		170	0	170			65.28	32.81	43.52	141.61	65.28	32.81	43.52	141.61
Harrisburg	HELMSRIDGE	HELMSRIDGE	APF2022-00038	SHEA HOMES	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Pending	Single Family		91	0	91			34.944	17.563	23.296	75.803	34.944	17.563	23.296	75.803
Cabarrus County	HENDRICK MOTORSPORTS COMPLEX	HENDRICK MOTORSPORTS COMPLEX	APF2008-00161	NO APPLICANT					Void			0	0	0			0	0	0	0	0	0	0	0
Harrisburg	HERITAGE MANOR	HERITAGE MANOR	APF2022-00014	PULTE GROUP	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Pending	Single Family		38	0	38			14.592	7.334	9.728	31.654	14.592	7.334	9.728	31.654
Kannapolis	HERITAGE OAKS ESTATES	HERITAGE OAKS ESTATES	APF2008-00162	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	HERITAGE RIDGE AT MOSS CREEK	APF2016-00001	INAARA LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active Building Permitting	Single Family	12/9/2021	84	76	8			32.256	16.212	21.504	69.972	3.072	1.544	2.048	6.664
Harrisburg	HICKORY RIDGE ROAD SITE	HICKORY RIDGE ROAD SITE	APF2021-00047	MATT LEVESQUE	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Pending	Townhouse		55	0	55			7.59	3.795	5.06	16.445	7.59	3.795	5.06	16.445
Concord	HIGH MEADOWS ROAD	HIGH MEADOWS ROAD	APF2022-00015	CHRIS TODD	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Void	Single Family		393	0	393			150.912	75.849	100.608	327.369	150.912	75.849	100.608	327.369
Concord	HIGH MEADOWS SINGLE FAMILY	HIGH MEADOWS SINGLE FAMILY	APF2021-00054	CHRIS TODD	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending	Single Family		393	0	393			150.912	75.849	100.608	327.369	150.912	75.849	100.608	327.369
Concord	HIGHLAND CREEK	HIGHLAND CREEK	APF2008-00147	Westbrook Highland Creek, LLC\Rhein	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	Single Family	3/23/2016	1200	1151	49	11/19/2001		460.8	231.6	307.2	999.6	18.816	9.457	12.544	40.817
Concord	HIGHWAY 29 MIXED USE	HIGHWAY 29 MIXED USE	APF2020-00027	WESLEY HINSON	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending	Single Family		132	0	132			50.688	25.476	33.792	109.956	50.688	25.476	33.792	109.956
Kannapolis	HILLSIDE	HILLSIDE	APF2022-00032	Evan Lloyd	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Pending	Townhouse		24	0	24			3.312	1.656	2.208	7.176	3.312	1.656	2.208	7.176
Harrisburg	HOLCOMBE WOODS	HOLCOMBE WOODS	APF2014-00022	US Developers LLC/Land Design	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active Building Permitting	Single Family	2/24/2022	420	412	8			161.28	81.06	107.52	349.86	3.072	1.544	2.048	6.664
Harrisburg	HOWIE PROPERTY	HOWIE PROPERTY	APF2018-00016	YARBROUGH	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Void	Single Family		76	0	76			29.184	14.668	19.456	63.308	29.184	14.668	19.456	63.308
Kannapolis	HUGH HILL	HUGH HILL	APF2018-00003	DAVID MILLER REALTY & INVESTMENT	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School		Closed-Built Out	Single Family	6/16/2021	0	18	-18			0	0	0	0	-6.912	-3.474	-4.608	-14.994
Concord	HUNTON FOREST	HUNTON FOREST	APF2017-00009	Steven Wilson	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	Single Family	10/27/2021	361	359	2			138.624	69.673	92.416	300.713	0.768	0.386	0.512	1.666
Kannapolis	HUTCHINS PROPERTY	HUTCHINS PROPERTY	APF2021-00049	MERRICK	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Void	Single Family		63	0	63			24.192	12.159	16.128	52.479	24.192	12.159	16.128	52.479
Concord	HWY 49 CONCORD 55 - SINGLE FAMILY ATTACHED	HWY 49 CONCORD 55 - SINGLE FAMILY ATTACHED	APF2019-00039	SEAN PAONE	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Withdrawn	Single Family		132	0	132			50.688	25.476	33.792	109.956	50.688	25.476	33.792	109.956
Concord	HWY 49 CONCORD 55 - SINGLE FAMILY DETACHED	HWY 49 CONCORD 55 - SINGLE FAMILY DETACHED	APF2019-00038	SEAN PAONE	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Withdrawn	Single Family		141	0	141			54.144	27.213	36.096	117.453	54.144	27.213	36.096	117.453
Kannapolis	INTEGRA SPRINGS KELLSWATER BRIDGE	INTEGRA SPRINGS KELLSWATER BRIDGE	APF2009-00013	GLK Group, LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	Multi Family	7/17/2009	312	286	26	7/14/2009	12/31/2011	72.384	36.192	48.36	156.936	6.032	3.016	4.03	13.078

Jurisdiction	APF Base Data Subdivision	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Kannapolis	IRISH CREEK	IRISH CREEK	APF2021-00050	LAND DESIGN					Pending	Single Family		1037	0	1,037			398.208	200.141	265.472	863.821	398.208	200.141	265.472	863.821
Kannapolis	JACOB'S RIDGE	JACOB'S RIDGE	APF2008-00033	YATES PROPERTIES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		All Lots Platted	Single Family	1/19/2021	27	22	5	1/20/2003		10.368	5.211	6.912	22.491	1.92	0.965	1.28	4.165
Kannapolis	JEFF & LAURA GRAY	JEFF & LAURA GRAY	APF2018-00004	JEFFREY GRAY	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Withdrawn	Single Family		4	0	4			1.536	0.772	1.024	3.332	1.536	0.772	1.024	3.332
Cabarrus County	JENSEN	JENSEN	APF2008-00168	Charlie Duke	Concord High School	Concord Middle School	W M Irvin Elementary School		Closed-Built Out	Single Family	10/25/2005	6	6	0			2.304	1.158	1.536	4.998	0	0	0	0
Kannapolis	JIM JOHNSON RD DEVELOPMENT	JIM JOHNSON RD DEVELOPMENT	APF2020-00018	PULTE HOMES	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
Kannapolis	JIM JOHNSON RD TOWNHOMES	JIM JOHNSON RD TOWNHOMES	JIM	KIMLEY HORN	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Void	Townhouse		0	0	0			0	0	0	0	0	0	0	0
Kannapolis	KANNAPOLIS APARTMENTS	KANNAPOLIS APARTMENTS	APF2020-00039	BRIAN PARENT	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Multi Family		72	0	72			16.704	8.352	11.16	36.216	16.704	8.352	11.16	36.216
Kannapolis	KANNAPOLIS PARKWAY SITE SINGLE FAMILY	KANNAPOLIS PARKWAY SINGLE FAMILY	APF2016-00004	MCEACHERN LEONARD B JR	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active Building Permitting	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	APF2016-00005	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
Kannapolis	KANNAPOLIS PARKWAY TOWNHOMES	KANNAPOLIS PARKWAY TOWNHOMES	APF2021-00051	BGE	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Townhouse		105	0	105			14.49	7.245	9.66	31.395	14.49	7.245	9.66	31.395
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		Closed-Built Out	Single Family	1/14/2022	960	900	60	10/27/2011	10/27/2026	368.64	185.28	245.76	799.68	23.04	11.58	15.36	49.98
Kannapolis	KELLSWATER COMMON	KELLSWATER COMMON	APF2020-00013	OWEN REID	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Void	Townhouse		150	0	150			20.7	10.35	13.8	44.85	20.7	10.35	13.8	44.85
Harrisburg	KENSINGTON FOREST	KENSINGTON FOREST	APF2008-00102	NIBLOCK DEVELOPMENT CORP	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Closed-Built Out	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		Active Building Permitting	Single Family	5/31/2022	13	11	2			4.992	2.509	3.328	10.829	0.768	0.386	0.512	1.666
Concord	KINGS GRANT MULTI-FAMILY	KINGS GRANT MULTI-FAMILY	APF2021-00062	KEITH MACVEAN	Cox Mill High School	Harris Road Middle School	Carl A Furr Elementary School		Pending	Multi Family		168	0	168			38.976	19.488	26.04	84.504	38.976	19.488	26.04	84.504
Concord	LAKESIDE AT BEDFORD FARMS	LAKESIDE AT BEDFORD FARMS	APF2008-00065	BUFFALO RANCH LLC	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Approved	Single Family		190	0	190	3/20/2007	9/22/2010	72.96	36.67	48.64	158.27	72.96	36.67	48.64	158.27
Harrisburg	LANDON	LANDON	APF2008-00129	KIM LOCATIS	Jay M Robinson High School	J N Fries Middle School	Pitt School Road Elementary School		Void	Townhouse		109	0	109	3/20/2006	3/20/2012	15.042	7.521	10.028	32.591	15.042	7.521	10.028	32.591
Kannapolis	LANE ST APARTMENTS	LANE ST APARTMENTS	APF2022-00041	Lane St Apts	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending	Multi Family		266	0	266			0	0	0	0	61.712	30.856	41.23	133.798
Kannapolis	LANE STREET MULTI-FAMILY	LANE STREET MULTI-FAMILY	APF2021-00053	ALEXANDER RICKS	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending	Multi Family		250	0	250			58	29	38.75	125.75	58	29	38.75	125.75
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		Closed-Built Out	Single Family	3/26/2021	88	87	1			33.792	16.984	22.528	73.304	0.384	0.193	0.256	0.833
Concord	LAUREL PARK	LAUREL PARK	APF2008-00099	NIBLOCK DEVELOPMENT CORP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Closed-Built Out	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	LAUREL PARK PHASE 3	LAUREL PARK PHASE 3	APF2008-00098	NIBLOCK DEVELOPMENT CORP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Void	Single Family		15	0	15			5.76	2.895	3.84	12.495	5.76	2.895	3.84	12.495
Concord	LAUREL PARK PHASES 4-6	LAUREL PARK PHASES 4-6	APF2008-00097	UNKNOWN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Void	Single Family	2/11/2014	257	2	255	3/15/2005	5/15/2012	98.688	49.601	65.792	214.081	97.92	49.215	65.28	212.415
Concord	LAWNDALE SINGLE FAMILY	LAWNDALE SINGLE FAMILY	APF2022-00001	MICAH VANDERBURG	Concord High School	Concord Middle School	R Brown McAllister Elementary School		Pending	Single Family		7	0	7			2.688	1.351	1.792	5.831	2.688	1.351	1.792	5.831
Concord	LEGACY CONCORD	LEGACY APARTMENTS	APF2014-00011	COBLE FAMILY FARM LTD PTNRSHIP	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Closed-Built Out	Multi Family	3/27/2015	348	332	16			79.808	39.904	53.32	173.032	3.712	1.856	2.48	8.048
Concord	LEGACY CONCORD PHASE II	LEGACY CONCORD PHASE II	APF2022-00017	SCOTT KIGER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Pending	Multi Family		154	0	154			35.728	17.864	23.87	77.462	35.728	17.864	23.87	77.462
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	LITEN LIVING	LITEN LIVING	APF2021-00057	LEE SIGMON	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Multi Family		260	0	260			60.32	30.16	40.3	130.78	60.32	30.16	40.3	130.78
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	Winecoff Elementary School		Pending	Multi Family		2020	0	2,020			468.64	234.32	313.1	1016.06	468.64	234.32	313.1	1016.06
Concord	LOWER ROCKY RIVER 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	Northwest Cabarrus Middle School	Winecoff Elementary School		Closed-Built Out	Single Family	1/26/2022	44	39	5	5/12/2005	12/31/2013	13.992	6.116	5.456	25.564	1.92	0.965	1.28	4.165
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		Active (platting & permitting)	Single Family		6	0	6			2.304	1.158	1.536	4.998	2.304	1.158	1.536	4.998
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	Winecoff 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	Single Family		8	0	8			3.072	1.544	2.048	6.664	3.072	1.544	2.048	6.664
Harrisburg	MANOR RIDGE	MANOR RIDGE	APF2008-00176	Michael Nicosia, PE	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Void	Single Family		300	0	300	11/20/2007	10/4/2015	115.2	57.9	76.8	249.9	115.2	57.9	76.8	249.9
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	MAY STREET	MAY STREET	APF2022-00035	CEVASTIANO HERNANDEZ	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Single Family		10	0	10			3.84	1.93	2.56	8.33	3.84	1.93	2.56	8.33
Concord	MCGRAW PROPERTY	MCGRAW PROPERTY	APF2008-00064	UNKNOWN	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Withdrawn	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
Harrisburg	MCKINLEY SUBDIVISION	MCKINLEY SUBDIVISION	APF2018-00031	GROUP	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Pending	Single Family		165	0	165			88.32	44.39	58.88	191.59	63.36	31.845	42.24	137.445
Kannapolis	MEADOW CREEK APARTMENTS	MEADOW CREEK APARTMENTS	APF2008-00116	FLORIAN GHITAS	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff 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	92	104	-12			53.76	27.02	35.84	116.62	-4.608	-2.316	-3.072	-9.996
Concord	MEETING STREET HOMES	MEETING STREET HOMES PHASE 2	APF2018-00024	AMICUS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Withdrawn	Townhouse	4/4/2022	66	25	41			9.108	4.554	6.072	19.734	5.658	2.829	3.772	12.259
Concord	MEETING STREET HOMES	MEETING STREET HOMES PHASE 3	APF2018-00025	AMICUS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Withdrawn	Townhouse		66	0	66			9.108	4.554	6.072	19.734	9.108	4.554	6.072	19.734
Concord	MEETING STREET HOMES	MEETING STRET HOMES PHASE 1	APF2018-00023	AMICUS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Withdrawn	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		Closed-Built Out	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
Concord	MIDDLEFIELD SINGLE FAMILY ATTACHED	MIDDLEFIELD SINGLE FAMILY ATTACHED	APF2021-00010	BRIDGET GRANT	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Withdrawn	Townhouse		127	0	127			17.526	8.763	11.684	37.973	17.526	8.763	11.684	37.973
Concord	MIDDLEFIELD SINGLE FAMILY DETACHED	MIDDLEFIELD SINGLE FAMILY DETACHED	APF2021-00009	BRIDGET GRANT	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Withdrawn	Single Family		821	0	821			315.264	158.453	210.176	683.893	315.264	158.453	210.176	683.893
Concord	MIDDLEFIELD SINGLE FAMILY MULTI-FAMILY	MIDDLEFIELD SINGLE FAMILY MULTI-FAMILY	APF2021-00011	BRIDGET GRANT	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Withdrawn	Multi Family		0	0	0			0	0	0	0	0	0	0	0
Midland	MIDLAND CROSSING	MIDLAND CROSSING	APF2019-00016	BURTON ENGINEERING	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Construction Drawing Review	Single Family		129	0	129			49.536	24.897	33.024	107.457	49.536	24.897	33.024	107.457
Kannapolis	MILL CREEK CROSSING - SFA	MILL CREEK CROSSING - SFA	APF2022-00010	Joel Causey	A L Brown High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Townhouse		300	0	300			41.4	20.7	27.6	89.7	41.4	20.7	27.6	89.7
Kannapolis	MILL CREEK CROSSING - SFD	MILL CREEK CROSSING - SFD	APF2022-00009	Joel Causey	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family		283	0	283			47.616	23.932	31.744	103.292	108.672	54.619	72.448	235.739
Kannapolis	MILLBROOKE	MILLBROOKE	APF2008-00114	GANDY COMMUNITIES	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Inactive	Single Family	11/4/2021	128	63	65	4/6/2008	4/6/2012	49.152	24.704	32.768	106.624	24.96	12.545	16.64	54.145
Kannapolis	MILLBROOKE	MILLBROOKE	APF2014-00015	GANDY COMMUNITIES					Void	Single Family	11/4/2021	131	63	68	4/6/2008		50.304	25.283	33.536	109.123	26.112	13.124	17.408	56.644
Concord	MILLGROVE	MILLGROVE	APF2021-00002	FRED MATRULLI	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Void	Single Family		136	0	136			52.224	26.248	34.816	113.288	52.224	26.248	34.816	113.288
Concord	MILLGROVE - COX MILL	MILLGROVE - COX MILL	APF2019-00021	ALAN KERLEY					Void	Single Family		0	0	0			0	0	0	0	0	0	0	0

Jurisdiction	APF Base Subdivision Date	Subdivision	APF#	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Concord	MILLGROVE SINGLE FAMILY ATTACHED	MILLGROVE SINGLE FAMILY ATTACHED	APF2019-00037	JOHN HOLCOMB	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Void	Single Family		100	0	100			38.4	19.3	25.6	83.3	38.4	19.3	25.6	83.3
Concord	MILLGROVE SINGLE FAMILY DETACHED	MILLGROVE SINGLE FAMILY DETACHED	APF2019-00036	JOHN HOLCOMB	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Void	Single Family		94	0	94			36.096	18.142	24.064	78.302	36.096	18.142	24.064	78.302
Kannapolis	MONARCH MEADOWS	MONARCH MEADOWS	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
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
Harrisburg	MOREHEAD ROAD SITE	MOREHEAD ROAD SITE	APF2021-00041	MATTAMY HOMES	Hickory Ridge High School	Hickory Ridge Middle School	Pitt School Road Elementary School		Pending	Single Family		85	0	85			32.64	16.405	21.76	70.805	32.64	16.405	21.76	70.805
Concord	MORRISON RIDGE - MULTI-FAMILY	MORRISON RIDGE - MULTI-FAMILY	APF2020-00032	KATIE BRADLEY	Central Cabarrus High School	C C Griffin Middle School	Rocky River 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	MORRISON RIDGE - SINGLE FAMILY ATTACHED	MORRISON RIDGE - SINGLE FAMILY ATTACHED	APF2020-00031	KATIE BRADLEY	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Withdrawn	Townhouse		200	0	200			27.6	13.8	18.4	59.8	27.6	13.8	18.4	59.8
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		Withdrawn	Single Family		150	0	150			57.6	28.95	38.4	124.95	57.6	28.95	38.4	124.95
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	14.668	19.456	63.308	-0.768	-0.386	-0.512	-1.666
Concord	MURPHY PROPERTY SINGLE FAMILY	MURPHY PROPERTY SINGLE FAMILY	APF2021-00029	AUSTIN COLEMAN	Concord High School	Concord Middle School	Beverly Hills Elementary School		Pending	Single Family		113	0	113			43.392	21.809	28.928	94.129	43.392	21.809	28.928	94.129
Mt. Pleasant	NEUENBERG	NEUENBERG	APF2018-00018	MEL THOMPSON	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Closed-Built Out	Single Family	3/9/2021	9	8	1			3.456	1.737	2.304	7.497	0.384	0.193	0.256	0.833
Concord	NEW LIFE DEVELOPERS	NEW LIFE DEVELOPERS	APF2021-00036	GREG LAFFERTY	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Pending	Single Family	2/2/2022	8	1	7			3.072	1.544	2.048	6.664	2.688	1.351	1.792	5.831
Kannapolis	NEWMAN MANOR	NEWMAN MANOR	APF2008-00145	J&E Land Holding Company	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		All Lots Platted	Single Family	2/21/2019	29	15	14	8/10/2005	4/25/2012	11.136	5.597	7.424	24.157	5.376	2.702	3.584	11.662
Concord	NIBLOCK EVA DRIVE	NIBLOCK EVA DRIVE	APF2017-00044	NIBLOCK	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	Single Family	6/2/2021	0	28	-28			0	0	0	0	-10.752	-5.404	-7.168	-23.324
Concord	Niblock Farms	Niblock Farms	APF2014-00008	Niblock Farms LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Void	Single Family		381	0	381			146.304	73.533	97.536	317.373	146.304	73.533	97.536	317.373
Concord	OAKLAWN	OAKLAWN	APF2022-00033	STREETSCAPE LAND PARTNERS	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Active (platting & permitting)	Townhouse		189	0	189			26.082	13.041	17.388	56.511	26.082	13.041	17.388	56.511
Concord	ODELL CORNER	ODELL CORNER	APF2016-00014	UNICA U B O	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse	6/6/2022	84	22	62			11.592	5.796	7.728	25.116	8.556	4.278	5.704	18.538
Cabarrus County	ODELL PLACE	ODELL PLACE	APF2008-00144	Howard R Hurlocker	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	8/21/2007	5	12	-7	1/15/2004		1.92	0.965	1.28	4.165	-2.688	-1.351	-1.792	-5.831
Concord	OLD CHARLOTTE MULTIFAMILY	OLD CHARLOTTE MULTIFAMILY	APF2021-00045	KATE UNDERWOOD	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending	Multi Family		32	0	32			7.424	3.712	4.96	16.096	7.424	3.712	4.96	16.096
Concord	OLD HOLLAND APARTMENTS	OLD HOLLAND APARTMENTS	APF2016-00020	OLD HOLLAND ROAD LLC	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Withdrawn	Multi Family		328	0	328			76.096	38.048	50.84	164.984	76.096	38.048	50.84	164.984
Concord	OLD HOLLAND MULTI-FAMILY	OLD HOLLAND MULTI-FAMILY	APF2021-00033	JIM GUYTON	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Multi Family		18	0	18			4.176	2.088	2.79	9.054	4.176	2.088	2.79	9.054
Concord	OLD HOLLAND RD MULTI FAMILY	OLD HOLLAND RD MULTI FAMILY	APF2020-00016	BRENT NARKAWICZ	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Void	Multi Family		0	0	0			0	0	0	0	0	0	0	0
Concord	OLDE HOMESTEAD	OLDE HOMESTEAD	APF2019-00029	KEN FOSTER	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Active Building Permitting	Single Family	6/1/2022	40	26	14			15.36	7.72	10.24	33.32	5.376	2.702	3.584	11.662
Cabarrus County	OLIVE WOODS	OLIVE WOODS	APF2010-00006	EMILY R CLINE	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		All Lots Platted	Single Family	2/28/2018	5	4	1	10/21/2010	12/31/2012	1.92	0.965	1.28	4.165	0.384	0.193	0.256	0.833
Harrisburg	ORCHID RIDGE	ORCHID RIDGE	APF2021-00024	ROBERT PRICE	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Pending	Single Family		459	0	459			176.256	88.587	117.504	382.347	176.256	88.587	117.504	382.347
Concord	OXFORD COMMONS	OXFORD COMMONS	APF2008-00085	FRANK STRAZULLA, PORTRAIT HOMES	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Closed-Built Out	Townhouse	10/15/2007	105	86	19	4/18/2006	12/31/2013	14.49	7.245	9.66	31.395	2.622	1.311	1.748	5.681
Cabarrus County	PARK CREEK	PARK CREEK	APF2013-00002	Keith Wayne	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		All Lots Platted	Single Family	5/4/2022	198	70	128			76.032	38.214	50.688	164.934	49.152	24.704	32.768	106.624
Cabarrus County	PARK CREEK PHASE 3	PARK CREEK PHASE 3	APF2008-00034	CARL ANDERSON	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Expired	Single Family		45	0	45	11/20/2008	12/31/2013	17.28	8.685	11.52	37.485	17.28	8.685	11.52	37.485
Concord	PARK PLACE	PARK PLACE	APF2008-00059	Craft Development	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Closed-Built Out	Single Family	5/3/2016	131	133	-2	1/27/2003	12/31/2011	50.304	25.283	33.536	109.123	-0.768	-0.386	-0.512	-1.666
Concord	PARK VIEW AT COX MILL	PARK VIEW AT COX MILL	APF2019-00012	CAREN WINGATE	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Single Family		168	0	168			32.64	16.405	21.76	70.805	64.512	32.424	43.008	139.944
Cabarrus County	PARKLAND VENTURES MHP	PARKLAND VENTURES MHP	APF2017-00020	FUTURE MHC NC LLC	Mt Pleasant High School	Mt Pleasant Middle School	A T Allen Elementary School		Pending	Single Family		90	0	90			34.56	17.37	23.04	74.97	34.56	17.37	23.04	74.97
Concord	PARKSIDE AT SKYBROOK VILLAGE	PARKSIDE AT SKYBROOK VILLAGE	APF2008-00067	SKYBOOK, LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	Single Family	8/23/2018	50	45	5	1/16/2007	1/17/2016	19.2	9.65	12.8	41.65	1.92	0.965	1.28	4.165
Concord	PARKSIDE AT SKYBROOK VILLAGE	PARKSIDE AT SKYBROOK VILLAGE	APF2018-00011	SKYBROOK LLC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Void	Single Family	8/23/2018	50	45	5			19.2	9.65	12.8	41.65	1.92	0.965	1.28	4.165
Concord	PARKVIEW	PARKVIEW	APF2009-00005	Real Value Development Inc.	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Closed-Built Out	Single Family	4/21/2021	195	178	17		7/15/2016	74.88	37.635	49.92	162.435	6.528	3.281	4.352	14.161
Kannapolis	PARKWAY COMMONS	PARKWAY COMMONS	APF2008-00107	AMERICAN DEVELOPMENT INDUSTRIES, 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
Concord	PARKWOOD DRIVE APARTMENTS	PARKWOOD DRIVE APARTMENTS	APF2018-00009	BRYCE MORRISON	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Townhouse		312	0	312			43.056	21.528	28.704	93.288	43.056	21.528	28.704	93.288
Concord	PARKWOOD DRIVE TOWNHOMES	PARKWOOD DRIVE TOWNHOMES	APF2021-00044	BRYCE MORRISON	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Townhouse		35	0	35			16.146	8.073	10.764	34.983	4.83	2.415	3.22	10.465
Cabarrus County	PEACH ORCHARD ESTATES	PEACH ORCHARD ESTATES	APF2008-00118	HAYDEN McMAHON DEVELOPMENT INC	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Active (platting & permitting)	Single Family	1/23/2020	134	145	-11	1/15/2004	8/30/2013	51.456	25.862	34.304	111.622	-4.224	-2.123	-2.816	-9.163
Concord	PEACHTREE TOWNHOMES	PEACHTREE TOWNHOMES	APF2021-00042	GINGER MOORE	Concord High School	Concord Middle School	Coltrane-Webb Elementary School		Pending	Townhouse		18	0	18			2.484	1.242	1.656	5.382	2.484	1.242	1.656	5.382
Kannapolis	PELHEM POINTE	PELHEM POINTE	APF2008-00041	Ryland Homes	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	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 SINGLE-FAMILY UNITS	PENDLETON MULTI-FAMILY UNITS	APF2010-00002	PENDLETON / CONCORD PARTNER, LLC	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Single Family		90	0	90		12/31/2013	34.56	17.37	23.04	74.97	34.56	17.37	23.04	74.97
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		Closed-Built Out	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
Kannapolis	PENNANT SQUARE PHASE 1	PENNANT SQUARE PHASE 1	APF2022-00003	TRI POINTE HOMES HOLDINGS INC	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending	Townhouse	5/6/2022	67	6	61			9.246	4.623	6.164	20.033	8.418	4.209	5.612	18.239
Harrisburg	PHARR MILL NEIGHBORHOOD	PHARR MILL NEIGHBORHOOD	APF2019-00022	DPR ASSOCIATES	Hickory Ridge High School	Hickory Ridge Middle School	Patriots Elementary School		Pending	Single Family		285	0	285			109.44	55.005	72.96	237.405	109.44	55.005	72.96	237.405
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	Construction Drawing Review	Multi Family		400	0	400		6/22/2014	92.8	46.4	62	201.2	92.8	46.4	62	201.2
Kannapolis	PIEDMENT CONCORD LAKE	PIEDMONT CONCORD LAKE	APF2014-00012	Jason Oesterreich	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School	Kannapolis Intermediate School	Construction Drawing Review	Townhouse		120	0	120		6/22/2014	16.56	8.28	11.04	35.88	16.56	8.28	11.04	35.88
Locust	PINE BLUFF SINGLE FAMILY DEVELOPMENT	PINE BLUFF SINGLE FAMILY DEVELOPMENT	APF2021-00032	SMITH DOUGLAS HOMES	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Approved	Single Family		114	0	114			43.776	22.002	29.184	94.962	43.776	22.002	29.184	94.962
Kannapolis	PINE CREEK	PINE CREEK	APF2013-00008	PINE CREEK DEVELOPERS LLC	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Inactive	Single Family	6/28/2021	58	30	28			22.272	11.194	14.848	48.314	10.752	5.404	7.168	23.324
Concord	PINE GROVE CHURCH ROAD SITE	PINE GROVE CHURCH ROAD SITE	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		Active (platting & permitting)	Townhouse		268	0	268			36.984	18.492	24.656	80.132	36.984	18.492	24.656	80.132
Concord	PIPER LANDING SFD	PIPER LANDING SFD	APF2019-00024	JEREMY HORTON	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Construction Drawing Review	Single Family		85	0	85			25.344	12.738	16.896	54.978	32.64	16.405	21.76	70.805
Concord	PITTS SCHOOL RD TOWNHOMES	PITTS SCHOOL RD TOWNHOMES	APF2021-00035	VAMSHEEDHAR DEVARISHATI	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Townhouse		56	0	56			7.728	3.864	5.152	16.744	7.728	3.864	5.152	16.744

Jurisdiction	APF Base Subdivision Data	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Exp Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Concord	PITTS SCHOOL ROAD DEVELOPMENT - SINGLE FAMILY DETACHED	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		Void	Single Family		0	0	0			0	0	0	0	0	0	0	0
Concord	PITTS SCHOOL ROAD TOWNHOME DEVELOPMENT	PITTS SCHOOL ROAD TOWNHOME DEVELOPMENT	APF2020-00009	AUSTIN MOBLEY	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Pending	Townhouse		243	0	243			33.534	16.767	22.356	72.657	33.534	16.767	22.356	72.657
Mt. Pleasant	PLEASANT CROSSING TOWNHOMES	PLEASANT CROSSING TOWNHOMES	APF2020-00022	MP DEVELOPMENT PARTNERS	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Construction Drawing Review	Multi Family		34	0	34			7.888	3.944	5.27	17.102	7.888	3.944	5.27	17.102
Concord	PLEASANT OAKS	PLEASANT OAKS	APF2008-00047	KISER DEVELOPMENT COMPANY	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Closed-Built Out	Single Family	2/28/2022	170	163	7	2/21/2005	8/17/2015	65.28	32.81	43.52	141.61	2.688	1.351	1.792	5.831
Concord	POPLAR COVE	POPLAR COVE	APF2016-00016		Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Closed-Built Out	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 ADULT LIVING CENTER	POPLAR CROSSING COMMONS ADULT LIVING CENTER	APF2012-00003	Workforce Homestead, Inc	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Closed-Built Out	Age Restricted		66	0	66			9.9	3.63	4.752	18.282	0	0	0	0
Concord	POPLAR POINTE TOWNHOMES	POPLAR POINT TOWNHOMES	APF2017-00032	JEFF REASNOR	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Closed-Built Out	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 RD SITE	POPLAR TENT RD SITE	APF2021-00043	MCKENZIE PUBLICOVER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Multi Family		330	0	330			76.56	38.28	51.15	165.99	76.56	38.28	51.15	165.99
Concord	POPLAR TENT ROAD SITE	POPLAR TENT ROAD SITE	APF2021-00027	MCKENZIE PUBLICOVER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Void	Multi Family		200	0	200			46.4	23.2	31	100.6	46.4	23.2	31	100.6
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	Single Family		20	0	20			7.68	3.86	5.12	16.66	7.68	3.86	5.12	16.66
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	PRIDE ONE DEVELOPMENT	PRIDE ONE DEVELOPMENT	APF2018-00015	SUSHANTH CHARABUDDI	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Multi Family		130	0	130			30.16	15.08	20.15	65.39	30.16	15.08	20.15	65.39
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
Kannapolis	PROVIDENCE PLACE	PROVIDENCE PLACE	APF2022-00005	ACRO Development Services	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Single Family		0	0	0			0	0	0	0	0	0	0	0
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	RAMSGATE	RAMSGATE	APF2008-00070	UNKNKOWN	Central Cabarrus High School	C C Griffin Middle School	A T Allen Elementary School		Closed-Built Out	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	Winecoff Elementary School		Pending	Townhouse		48	0	48			6.624	3.312	4.416	14.352	6.624	3.312	4.416	14.352
Kannapolis	RED ST DUPLEXES	RED ST DUPLEXES	APF2022-00024	Darrell Turner	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending	Single Family		0	0	0			0	0	0	0	0	0	0	0
Kannapolis	REDWOOD KANNAPOLIS	REDWOOD KANNAPOLIS	APF2022-00004	Bob Dyer	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Single Family		158	0	158			60.672	30.494	40.448	131.614	60.672	30.494	40.448	131.614
Kannapolis	REDWOOD KANNAPOLIS PARKWAY	REDWOOD KANNAPOLIS PARKWAY	APF2020-00002	BOB DYER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Void	Multi Family	2/11/2022	166	99	67			38.512	19.256	25.73	83.498	15.544	7.772	10.385	33.701
Kannapolis	REDWOOD LIVING DAVIDSON HIGHWAY	REDWOOD LIVING DAVIDSON HIGHWAY	APF2021-00004	BOB DYER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Townhouse		78	0	78			10.764	5.382	7.176	23.322	10.764	5.382	7.176	23.322
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		Withdrawn	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
Concord	RING AV DUPLEXES	RING AV DUPLEXES	APF2021-00026	DALE FINK	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Single Family		8	0	8			3.072	1.544	2.048	6.664	3.072	1.544	2.048	6.664
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	unkown	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 CROSSSING	ROBERTA CROSSING	APF2014-00003	LIVE WELL HOMES	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Closed-Built Out	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		Closed-Built Out	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		Closed-Built Out	Single Family	6/18/2021	206	208	-2			79.104	39.758	52.736	171.598	-0.768	-0.386	-0.512	-1.666
Concord	ROBERTA ROAD SUBDVISION SOUTH	ROBERTA ROAD SUBDVISION SOUTH	APF2017-00042	PULTE HOMES	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School		Void	Single Family		28	0	28			10.752	5.404	7.168	23.324	10.752	5.404	7.168	23.324
Concord	ROBERTA ROAD TOWNHOMES	ROBERTA ROAD TOWNHOMES	APF2019-00011	JONATHAN CARTER	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School		Withdrawn	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	Townhouse		74	0	74			10.212	5.106	6.808	22.126	10.212	5.106	6.808	22.126
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 TOWNHOMES	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		Active (platting & permitting)	Single Family	11/16/2021	3	6	-3			3.072	1.544	2.048	6.664	-1.152	-0.579	-0.768	-2.499
Concord	ROYSCROFT	ROYSCROFT	APF2008-00073	PROVIDENT DEVELOPMENT GROUP	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Pending	Single Family		0	0	0	3/15/2007	3/14/2013	0	0	0	0	0	0	0	0
Cabarrus County	RUSTIC CANYON	RUSTIC CANYON	APF2008-00063	SHEA HOMES	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		In Progress	Single Family		595	0	595	6/21/2007	6/20/2013	228.48	114.835	152.32	495.635	228.48	114.835	152.32	495.635
Midland	SADDLEBROOK	SADDLEBROOK	APF2008-00133	LANDCRAFT	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Closed-Built Out	Single Family	5/8/2018	169	183	-14	3/13/2007	5/13/2017	64.512	32.424	43.008	139.944	-5.376	-2.702	-3.584	-11.662
Concord	SALISBURY TRACE AT BRANCHVIEW	SALISBURY TRACE AT BRANCHVIEW	APF2016-00008	COPPERFIELD APTS/DARREN LUCAS	Concord High School	Concord Middle School	W M Irvin Elementary School		Withdrawn	Multi Family		424	0	424			98.368	49.184	65.72	213.272	98.368	49.184	65.72	213.272
Kannapolis	SAMUEL CRISP MINOR SUBDIVISION	SAMUEL CRISP MINOR SUBDIVISION	APF2017-00023	SAMUEL CRISP	A L Brown High School		Jackson Park Elementary School	Kannapolis Intermediate School	Closed-Built Out	Single Family	3/2/2018	0	4	-4			3.072	1.544	2.048	6.664	-1.536	-0.772	-1.024	-3.332
Concord	SANCTUARY CODDLE CREEK	SANCTUARY CODDLE CREEK	APF2014-00005	DUNCAN VIRGINIA C ESTATE	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Withdrawn	Multi Family	9/18/2017	62	1	61			14.384	7.192	9.61	31.186	14.152	7.076	9.455	30.683
Concord	SAPPHIRE HILLS	SAPPHIRE HILLS	APF2008-00045	JBC Development Concord, LLC	Concord High School	Concord Middle School	Weddington Hills Elementary School		Closed-Built Out	Townhouse	8/12/2010	60	54	6	5/16/2006	7/13/2013	8.28	4.14	5.52	17.94	0.828	0.414	0.552	1.794
Concord	SAVANNAH COMMONS	SAVANNAH COMMONS	APF2008-00049	LANDMARK DEVELOPMENT VENTURES, LLC	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Closed-Built Out	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	SELLERS PROPERTY	SELLERS PROPERTY	APF2020-00021	BRANDY SELLERS	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Single Family	10/21/2021	2	2	0			2.688	1.351	1.792	5.831	0	0	0	0
Concord	SETTLERS LANDING TOWNHOMES	SETTLERS LANDING TOWNHOMES	APF2008-00179	Coddle Creek Development Group, LLC	Jay M Robinson High School	HD Winkler Middle School	Pitt School Road Elementary School		Closed-Built Out	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	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	APF2018-00014	BLOC DESIGN	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Void	Single Family		91	0	91			34.944	17.563	23.296	75.803	34.944	17.563	23.296	75.803
Kannapolis	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	10/12/2021	30	31	-1	6/19/2006		11.52	5.79	7.68	24.99	-0.384	-0.193	-0.256	-0.833
Locust	SIGNATURE DEVELOPMENT	SIGNATURE DEVELOPMENT	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	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 APARTMENTS	SKYBROOK APARTMENTS	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
Concord	SKYBROOK CORNERS	SKYBROOK CORNERS	APF2020-00001	SCOTT WILSON	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Townhouse		71	0	71			9.798	4.899	6.532	21.229	9.798	4.899	6.532	21.229

Jurisdiction	APF Base Subdivision Data	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Kannapolis	SOUTH EMERSON HILLS APARTMENT HOMES	SOUTH EMERSON HILLS APARTMENT HOMES	APF2022-00023	Kara Strickland	Concord High School	Concord Middle School	Royal Oaks Elementary School		Active (platting & permitting)	Multi Family		0	0	0			0	0	0	0	0	0	0	0
Mt. Pleasant	SOUTH SKYLAND TOWNHOMES	SOUTH SKYLAND TOWNHOMES	APF2018-00017	RONALD BURRAGE	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Construction Drawing Review	Multi Family		16	0	16			3.712	1.856	2.48	8.048	3.712	1.856	2.48	8.048
Kannapolis	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	APF2009-00002	Richard McGinnis	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School	Kannapolis Intermediate School	Inactive	Townhouse	5/27/2022	145	33	112		8/8/2012	20.01	10.005	13.34	43.355	15.456	7.728	10.304	33.488
Concord	SOUTHWOOD REALTY APTS	SOUTHWOOD REALTY APTS	APF2019-00023	WILLIAM RATCHFORD	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending	Multi Family		0	0	0			0	0	0	0	0	0	0	0
Concord	SPRING MEADOW	SPRING MEADOW	APF2017-00041	BOYD STANLEY	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Active (platting & permitting)	Single Family	6/8/2022	169	62	107			44.16	22.195	29.44	95.795	41.088	20.651	27.392	89.131
Concord	SPRING STREET TOWNHOMES	SPRING STREET TOWNHOMES	APF2021-00014	ALEX PETER	Concord High School	Concord Middle School	R Brown McAllister Elementary School		Pending	Townhouse		30	0	30			4.14	2.07	2.76	8.97	4.14	2.07	2.76	8.97
Concord	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		Closed-Built Out	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	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
Cabarrus County	St. Andrews Phase 7	St. ANDREWS PHASE 7	APF2008-00171	Danny Bost					Void	Single Family		35	0	35			13.44	6.755	8.96	29.155	13.44	6.755	8.96	29.155
Harrisburg	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	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	APF2010-00004	CHRISTOPER 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 SUBDIVISION	STALLINGS ROAD SUBDIVISION	APF2018-00013	ROBERT W NIXON	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Active (platting & permitting)	Single Family		191	0	191			73.344	36.863	48.896	159.103	73.344	36.863	48.896	159.103
Concord	STILLWATER	STILLWATER	APF2008-00048	BRIAN LAYTON & JAMES D. LINKER	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Beverly Hills Elementary School		Void	Single Family		6	0	6	2/20/2007	2/20/2013	2.304	1.158	1.536	4.998	2.304	1.158	1.536	4.998
Kannapolis	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	APF2014-00010	JBR CUSTOM HOMES INC	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	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	APF2020-00007	MATT PANNELL	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Active (platting & permitting)	Townhouse		152	0	152			20.976	10.488	13.984	45.448	20.976	10.488	13.984	45.448
Kannapolis	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		Active (platting & permitting)	Single Family		220	0	220			84.48	42.46	56.32	183.26	84.48	42.46	56.32	183.26
Kannapolis	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	6/2/2022	99	81	18	1/27/2014		38.016	19.107	25.344	82.467	6.912	3.474	4.608	14.994
Kannapolis	SUMMIT SPRINGS	SUMMIT SPRINGS	APF2022-00022	Campbell	A L Brown High School	Kannapolis Middle School	Jackson Park Elementary School		Construction Drawing Review			18	0	18			0	0	0	0	4.176	2.088	2.79	9.054
Concord	TAYLOR GLEN	TAYLOR GLEN	APF2022-00043	REED VANDERSLIK	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Age Restricted Development			241	0	241			0	0	0	0	55.912	27.956	37.355	121.223
Concord	TAYLOR MORRISON	TAYLOR MORRISON	APF2021-00060	JOE WILSON	Concord High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending	Single Family		213	0	213			81.792	41.109	54.528	177.429	81.792	41.109	54.528	177.429
Harrisburg	FARMINGTON TOWNHOMES	TERRACES AT FARMINGTON	APF2017-00010	ROCKY RIVER ROAD ASSOC LLC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Construction Drawing Review	Townhouse		190	0	190			26.22	13.11	17.48	56.81	26.22	13.11	17.48	56.81
Concord	THE ARBORS	THE ARBORS	APF2019-00028	GINGER MOORE	Concord High School	Concord Middle School	R Brown McAllister 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	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	5/27/2022	20	14	6	5/18/2006	5/17/2012	7.68	3.86	5.12	16.66	2.304	1.158	1.536	4.998
Concord	THE CASCADES	THE CASCADES	APF2022-00012	THE ISAACS GROUP	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending			36	0	36			0	0	0	0	8.352	4.176	5.58	18.108
Harrisburg	THE COURTYARDS ON ROBINSON CHURCH	THE COURTYARDS ON ROBINSON CHURCH	APF2018-00012	YARBROUGH-WILLIAMS & HOULE, INC	Hickory Ridge High School	Hickory Ridge Middle School	Harrisburg Elementary School		Construction Drawing Review	Single Family		77	0	77			29.568	14.861	19.712	64.141	29.568	14.861	19.712	64.141
Cabarrus County	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	4/27/2021	21	16	5	8/18/2005		8.064	4.053	5.376	17.493	1.92	0.965	1.28	4.165
Kannapolis	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 (platting & permitting)	Single Family	6/6/2022	203	196	7			77.952	39.179	51.968	169.099	2.688	1.351	1.792	5.831
Kannapolis	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 (platting & 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	APF2008-00112	MCCLAIN, BARR & ASSOCIATES, SCOTT NEELY AND STEVE	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
Kannapolis	The Meadows	The Meadows	APF2009-00008	Todd Meckley	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School	Kannapolis Intermediate School	Void	Multi Family		0	0	0			0	0	0	0	0	0	0	0
Concord	THE MILLS AT ROCKY RIVER	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	APF2019-00002	NICK PARKER	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School		Construction Drawing Review	Townhouse		95	0	95			17.25	8.625	11.5	37.375	13.11	6.555	8.74	28.405
Concord	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 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		Closed-Built Out	Single Family	3/4/2022	853	846	7	12/15/2005	7/12/2016	327.552	164.629	218.368	710.549	2.688	1.351	1.792	5.831
Concord	THE OAKS AT STEPHENS	THE OAKS AT STEPHENS PLACE	APF2010-00007	JOHN FALKENBURY	Concord High School	Concord Middle School	Coltrane-Webb Elementary School		Void	Single Family		0	0	0			0	0	0	0	0	0	0	0
Concord	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	APF2015-00002	PANARA JAYSUKHLAL V	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Weddington Hills Elementary School		Closed-Built Out	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	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	APF2008-00182	Tom McClellan	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Closed-Built Out	Multi Family	4/28/2016	312	312	0			72.384	36.192	48.36	156.936	0	0	0	0
Concord	THE VIEW	THE VIEW	APF2008-00180	Dane Dysert	Jay M Robinson High School	Harris Road Middle School	Weddington Hills Elementary School		Void	Single Family		0	0	0			0	0	0	0	0	0	0	0
Locust	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	APF2008-00087	PULTE HOMES	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Closed-Built Out	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	VILLAGES AT SKYBROOK NORTH PHASE 3	THE VILLAGES AT SKYBROOK NORTH PHASE 3	APF2009-00011	Steven Pace	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Void	Single Family	9/16/2013	33	3	30	11/18/2008	12/31/2013	12.672	6.369	8.448	27.489	11.52	5.79	7.68	24.99
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		Closed-Built Out	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	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	APF2008-00134	FRANK JACOBUS, WILLIAM BREWSTER CO., INC	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Expired	Single Family	9/16/2011	58	1	57	2/6/2009		34.344	15.012	13.392	62.748	21.888	11.001	14.592	47.481
Concord	TOWER PLACE TOWNHOMES PHASE 2	TOWER PLACE TOWNHOMES PHASE 2	APF2009-00015	Fortune	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Pending	Townhouse		64	0	64			8.832	4.416	5.888	19.136	8.832	4.416	5.888	19.136
Harrisburg	TRAMORE	TRAMORE	APF2021-00025	ALAN KERLEY					Construction Drawing Review	Single Family		42	0	42			16.128	8.106	10.752	34.986	16.128	8.106	10.752	34.986
Concord	TRANSFORMATION HOMES	TRANSFORMATION HOMES	APF2021-00061	RYAN LINDSEY	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow Elementary School		Pending	Single Family		13	0	13			4.992	2.509	3.328	10.829	4.992	2.509	3.328	10.829
Kannapolis	TRINITY CREST	TRINITY CREST	APF2008-00158	Cindy Geater	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active Platting	Single Family	11/3/2015	60	60	0			23.04	11.58	15.36	49.98	0	0	0	0

Jurisdiction	APF Base Data Subdivision	Subdivision	APF	Applicant	High School	Middle School	Elementary School	Intermediate School	Status	Subdivision Type	Last Permit	UnitsApproved	Units Issued	Units Remaining	Dev Order Approved	DO Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	Remaining High	Remaining Total
Kannapolis	TRINITY CROSSING	TRINITY CROSSING	APF2021-00055	REQ FUNDING SOLUTIONS III	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Active (platting & permitting)	Single Family	6/2/2022	115	31	84			44.16	22.195	29.44	95.795	32.256	16.212	21.504	69.972
Kannapolis	TRINITY CHURCH ROAD DEVELOPMENT	TRINITY CROSSING ROAD DEVELOPMENT	APF2017-00046	BOYD STANLY	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family		149	0	149			57.216	28.757	38.144	124.117	57.216	28.757	38.144	124.117
Cabarrus County	TRINITY PLACE	TRINITY PLACE	APF2008-00159	Primestar Properties Inc	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	Single Family	6/2/2022	5	10	-5			1.92	0.965	1.28	4.165	-1.92	-0.965	-1.28	-4.165
Kannapolis	TRINTY ROAD APARTMENTS	TRINTY ROAD APARTMENTS	APF2020-00036	INDUS TRINITY	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		114	0	114			26.448	13.224	17.67	57.342	26.448	13.224	17.67	57.342
Concord	TROUTMAN ENTERPRISES	TROUTMAN ENTERPRISES	APF2020-00010	JEFF YOUNG	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Construction Drawing Review	Single Family	12/8/2021	14	6	8			5.376	2.702	3.584	11.662	3.072	1.544	2.048	6.664
Midland	TUCKER CHASE	TUCKER CHASE	APF2008-00101	CHUCK STEVENS	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Active (platting & permitting)	Single Family	7/26/2016	130	129	1	6/1/2004		62.208	31.266	41.472	134.946	0.384	0.193	0.256	0.833
Concord	TUCKER'S WALK	TUCKER'S WALK	APF2017-00033	KEN ORNDORFF	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Active Building Permitting	Townhouse	6/8/2022	91	7	84			12.558	6.279	8.372	27.209	11.592	5.796	7.728	25.116
Concord	UNICA	UNICA	APF2015-00008	UNICA U B O	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Withdrawn	Single Family		175	0	175			67.2	33.775	44.8	145.775	67.2	33.775	44.8	145.775
Concord	UPPER ROOM INTERNATIONAL	UPPER ROOM INTERNATIONAL	APF2021-00022	KEVIN WILLIAMS	Central Cabarrus High School	C C Griffin Middle School	Wolf Meadow 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	VANDERBURG ESTATES	VANDERBURG ESTATES	APF2008-00160	Horton Landvest Inc	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		All Lots Platted	Single Family	2/14/2022	114	50	64			43.776	22.002	29.184	94.962	24.576	12.352	16.384	53.312
Kannapolis	VIDA	VIDA	APF2016-00027	CITY OF KANNAPOLIS	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Closed-Built Out	Multi Family		280	0	280			64.96	32.48	43.4	140.84	64.96	32.48	43.4	140.84
Kannapolis	VIDA III	VIDA 3	APF2022-00021	Aaron Wagoner	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Multi Family		0	0	0			0	0	0	0	0	0	0	0
Concord	VILLAGES AT DREAMING CREEK SINGLE FAMILY	VILLAGES AT DREAMING CREEK SINGLE FAMILY	APF2008-00091	YATES PROPERTIES, LLC	Jay M Robinson High School	HD Winkler Middle School	Wolf Meadow Elementary School		Withdrawn	Single Family		57	0	57	7/17/2009	12/31/2015	21.888	11.001	14.592	47.481	21.888	11.001	14.592	47.481
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		Withdrawn	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	VILLAS AT FOREST PARK RETIREMENT FACILITY	VILLAS 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	VILLAS AT LOGAN GARDENS RETIREMENT FACILITY	VILLAS AT LOGAN GARDENS RETIREMENT FACILITY	APF2009-00014	Doug Hart	Jay M Robinson High School	HD Winkler Middle School	W M Irvin Elementary School		Closed-Built Out	Age Restricted	1/28/2014	44	2	42	9/15/2009		0	0	0	0	0	0	0	0
Concord	VILLAS AT WINECOFF	VILLAS AT WINECOFF	APF2008-00043	Danny Bost	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Closed-Built Out	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
Kannapolis	W F ST TOWNHOMES	W F ST TOWNHOMES	APF2022-00019	David Miller	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Active (platting & permitting)	Townhouse		12	0	12			0	0	0	0	1.656	0.828	1.104	3.588
Mt. Pleasant	WALKER ROAD PROPERTIES	WALKER ROAD PROPERTIES	APF2019-00006	ERIN BURRIS	Mt Pleasant High School	Mt Pleasant Middle School	Mt Pleasant Elementary School		Sketch	Single Family		60	0	60			23.04	11.58	15.36	49.98	23.04	11.58	15.36	49.98
Concord	WALLACE MEADOWS TOWNHOMES	WALLACE MEADOWS TOWNHOMES	APF2018-00008	PETE ELMER	Cox Mill High School	Harris Road Middle School	Cox Mill Elementary School		Pending	Townhouse		98	0	98			13.524	6.762	9.016	29.302	13.524	6.762	9.016	29.302
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 (platting & 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	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 ROAD SINGLE FAMILY DETACHED	APF2021-00038	DANIEL LAMBERT	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending	Single Family		85	0	85			32.64	16.405	21.76	70.805	32.64	16.405	21.76	70.805
Concord	WEDINGTON 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		Void	Single Family		281	0	281			107.904	54.233	71.936	234.073	107.904	54.233	71.936	234.073
Concord	WEDDINGTON ROAD TOWNHOMES	WEDDINGTON ROAD TOWNHOMES	APF2021-00039	DANIEL LAMBERT	Jay M Robinson High School	HD Winkler Middle School	Weddington Hills Elementary School		Pending	Townhouse		246	0	246			33.948	16.974	22.632	73.554	33.948	16.974	22.632	73.554
Concord	WEDDINGTON ROAD TRACT	WEDDINGTON ROAD TRACT	APF2017-00045	SCOTT KIGER	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Void	Multi Family		268	0	268			62.176	31.088	41.54	134.804	62.176	31.088	41.54	134.804
Concord	WEDDINGTON ROAD VILLAS	WEDDINGTON ROAD VILLAS	APF2020-00033	EDDIE MOORE	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Townhouse		90	0	90			12.42	6.21	8.28	26.91	12.42	6.21	8.28	26.91
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 (platting & 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		Closed-Built Out	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		Closed-Built Out	Single Family		6	0	6			2.304	1.158	1.536	4.998	2.304	1.158	1.536	4.998
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
Midland	WICKER PARK	WICKER PARK	APF2022-00018	Melissa Oliver	Hickory Ridge High School	Hickory Ridge Middle School	Bethel Elementary School		Active Building Permitting	Single Family		126	0	126			0	0	0	0	48.384	24.318	32.256	104.958
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 (platting & 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		Void	Single Family	2/11/2021	7	13	-6			2.688	1.351	1.792	5.831	-2.304	-1.158	-1.536	-4.998
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	5/23/2022	20	2	18			2.76	1.38	1.84	5.98	2.484	1.242	1.656	5.382
Concord	WILKINSON CT DEVELOPMENT	WILKINSON CT DEVELOPMENT	APF2022-00042	KATE UNDERWOOD	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			8	0	8			0	0	0	0	1.856	0.928	1.24	4.024
Concord	WILKINSON CT TOWNHOMES	WILKINSON CT TOWNHOMES	APF2022-00034	BLOC DESIGN	Concord High School	Concord Middle School	W M Irvin Elementary School		Active Building Permitting	Townhouse		12	0	12			1.656	0.828	1.104	3.588	1.656	0.828	1.104	3.588
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	2/18/2021	98	38	60			37.632	18.914	25.088	81.634	23.04	11.58	15.36	49.98
Kannapolis	WINDSOR PHASE IIB	WINDSOR PHASE IIB	APF2013-00004	KANNAPOLIS REAL ESTATE					Void	Single Family		0	0	0			0	0	0	0	0	0	0	0
Concord	WINECOFF SCHOOL ROAD PROJECT	WINECOFF SCHOOL ROAD PROJECT	APF2018-00010	CHRIS TODD	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Void	Townhouse		117	0	117			16.146	8.073	10.764	34.983	16.146	8.073	10.764	34.983
Kannapolis	WHISPERING WINDS	WISPERING 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	WOODBRIDGE AT ZEMOSA	WOODBRIDGE AT ZEMOSA	APF2008-00090	NIBLOCK DEVELOPMENT CORP.	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Closed-Built Out	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	21	21	0	11/20/2007		11.52	5.79	7.68	24.99	0	0	0	0
Midland	WYNDHAM FOREST	WYNDHAM FOREST	APF2017-00024	DEPENDABLE DEVELOPMENT INC	Central Cabarrus High School	C C Griffin Middle School	Bethel Elementary School		Closed-Built Out	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		Closed-Built Out	Multi Family	5/12/2021	149	134	15			34.568	17.284	23.095	74.947	3.48	1.74	2.325	7.545

Jurisdiction	APF Base Data 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 Leg Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Middle Remaining	High Remaining	Remaining Total
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
Concord	ZION CHURCH RD RESIDENTIAL	ZION CHURCH RD RESIDENTIAL	APF2020-00014	FRANK SHEPHERDSON	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Void	Single Family		29	0	29			11.136	5.597	7.424	24.157	11.136	5.597	7.424	24.157
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	Single Family		29	0	29			11.136	5.597	7.424	24.157	11.136	5.597	7.424	24.157
Concord	ZION CHURCH RD RESIDENTIAL	ZION CHURCH RD RESIDENTIAL	ION	FRANK SHEPHERDSON	Central Cabarrus High School	C C Griffin Middle School	Rocky River Elementary School		Void	Single Family		29	0	29			11.136	5.597	7.424	24.157	11.136	5.597	7.424	24.157
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
												76049	**27904**	**49,019**			**22762.57**	**11404.7**	**15117.55**	**49284.8**	**13833.718**	**6940.455**	**9227.705**	**30001.878**

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Reports

SUBJECT:
EDC - May 2022 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.

ATTACHMENTS:

- Report

Project Activity Report

MAY 2022

Current Active Projects: 50

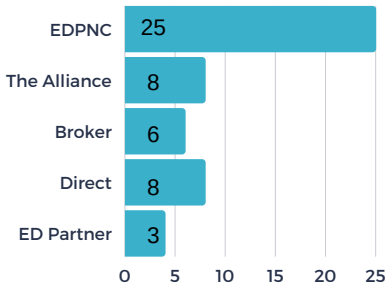
Projects Added in May: 7

STATS OVER THE PAST MONTH

The EDC received 18 new projects/RFIs (request for information) in May and submitted sites/buildings for 7 of the new requests. There were 5 client/consultant site visits or meetings in May.

Project Activity Highlights

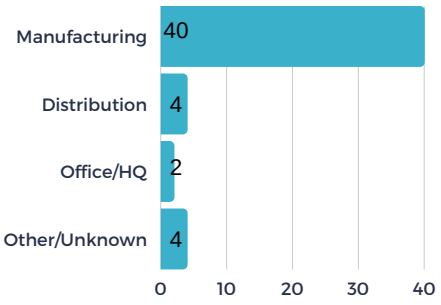
PROJECTS BY SOURCE



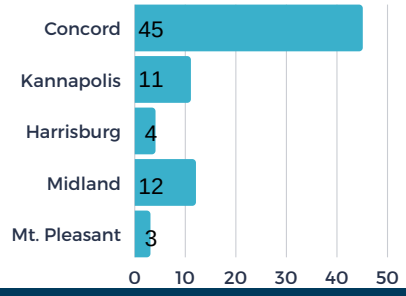
PROJECTS BY TYPE



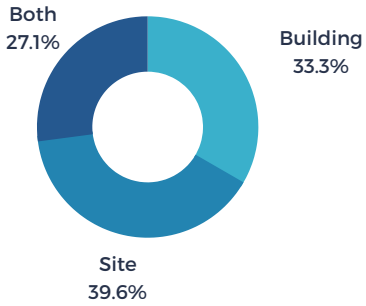
PROJECTS BY INDUSTRY



OF PROJECTS BY LOCATION



BUILDINGS VS. SITE - %



213
average jobs per project

$91M
average investment per project

116K
average square feet per project

34
average acres per project

32%
of Cabarrus EDC's projects involved companies outside of the U.S.

57 Union Street South
Concord, NC 28025

704-703-1725
www.cabarrusedc.com

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 20, 2022
6:30 PM

AGENDA CATEGORY:
Closed Session

SUBJECT:
Closed Session - Pending Litigation, Economic Development and Acquisition of Real Property

BRIEF SUMMARY:
A closed session is needed to discuss matters related to pending litigation, economic development, and acquisition of real property as authorized by NCGS 143-318.11(a)(3), (4) and (5).

REQUESTED ACTION:
Motion to go into closed session to discuss matters related to pending litigation, economic development, and acquisition of real property as authorized by NCGS 143-318.11(a)(3), (4) and (5).

EXPECTED LENGTH OF PRESENTATION:
30 Minutes

SUBMITTED BY:
Mike Downs, County Manager

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS: