CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
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

A. APPROVAL OR CORRECTIONS OF MINUTES

1. Approval or Correction of Meeting Minutes Pg. 4

B. APPROVAL OF THE AGENDA

1. BOC - Changes to the Agenda Pg. 21

C. RECOGNITIONS AND PRESENTATIONS

1. Active Living and Parks - July Park and Recreation Month Pg. 23
2. Cabarrus Soil and Water Conservation - Contest Winners Pg. 27
3. Human Resources - Recognition of Teresa Hillie on Her Retirement from Cabarrus County Department of Human Services Pg. 30

D. INFORMAL PUBLIC COMMENTS

E. 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. Appointments - Board of Equalization and Review Pg. 31
2. Appointments - Jury Commission Pg. 36

3. Appointments - Region F Aging Advisory Committee Pg. 40
4. Appointments - Water and Sewer Authority of Cabarrus County Pg. 44
5. Appointments and Removals - Cabarrus County Tourism Authority Pg. 49
6. Appointments and Removals - Centralina Workforce Development Board Pg. 57
7. Appointments and Removals - Juvenile Crime Prevention Council Pg. 64
8. Appointments and Removals - Transportation Advisory Board Pg. 72
9. Appointments (Removals) - Youth Commission Pg. 78
10. BOC - NACo Voting Credentials - 2023 Annual Conference Pg. 82
11. BOC - Resolution Amending the Cabarrus County Board of Commissioners' 2023 Meeting Schedule Pg. 83
12. County Manager - Easement for Back Creek Greenway Pg. 85
13. County Manager - Provider for Regional Behavioral Health Center Pg. 100
14. DHS - FY24 Home and Community Care Block Grant Funding Plan Pg. 191
15. Finance - Budget Amendment Ambulance Fees and EMS | MC billing service fees Pg. 248
16. Finance - Cabarrus County Schools Health Sciences Institute Pg. 251
17. Finance - Governmental Accounting Standards Board (GASB) 87 Budget Amendment Pg. 257
18. Finance - Government Accounting Standards Board (GASB) 96 Pg. 260
19. Finance - Health Insurance Fund Balance Budget Amendment Pg. 264
20. Finance - Opioid Abatement Funding Pg. 267
21. Human Resources - Fire Services Compensation Pg. 278
22. Juvenile Crime Prevention Council - Approval of FY 23-24 JCPC Certification Pg. 281
23. Planning and Development - Community Development Budget Amendment Pg. 288
24. Planning and Development - Community Development Grant Required Plans and Programs Pg. 291
25. Register of Deeds - Use of Register of Deeds Automation Fund for Re-indexing Cabarrus County Land Records Pg. 308
26. Sheriff's Office - Awarding of Service Weapon to Captain Kevin Pfister Upon His Retirement Pg. 313
27. Sheriff's Office - Retirement of K9 Turbo Pg. 317
28. Tax Administration - Refund and Release Reports - May 2023 Pg. 320

F. NEW BUSINESS

1. JCPC – Funding Appeal Pg. 336
2. Sheriff's Office - Budget Amendment -Tek84 Body Scanner Pg. 343
3. County Manager - Adoption of the Fiscal Year 2024 Budget Pg. 347

G. OLD BUSINESS

1. County Manager - Fiscal Year 2023 Funding Re-appropriations Pg. 258
2. Finance - Capital Improvement Plan ("CIP") Funded Projects in the FY2024 General Fund Budget Pg. 367

3. Human Resources - Personnel Ordinance Update Pg. 404

H. REPORTS

1. BOC - Receive Updates from Commission Members who Serve as Liaisons to Municipalities or on Various Boards/Committees Pg. 408
2. BOC - Request for Applications for County Boards/Committees Pg. 409
3. Budget - Monthly Budget Amendment Report Pg. 423
4. Budget - Monthly Financial Update Pg. 448
5. County Manager - Monthly Building Activity Reports Pg. 454
6. County Manager - Monthly New Development Report Pg. 459
7. EDC - May 2023 Monthly Summary Report Pg. 470

I. GENERAL COMMENTS BY BOARD MEMBERS

J. WATER AND SEWER DISTRICT OF CABARRUS COUNTY

K. ADJOURN

Scheduled Meetings

July 10	**Work Session**	**4:00 p.m.**	**Multipurpose Room**
July 17	**Regular Meeting**	**6:30 p.m.**	**BOC Meeting Room**
July 19	**Cabarrus Summit**	**6:00 p.m.**	**Cabarrus Arena**
August 7	**Work Session**	**4:00 p.m.**	**Multipurpose Room**
August 21	**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 19, 2023
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 17, 2023 (Summit)
April 27, 2023 (Budget Meeting)
May 1, 2023 (Work Session)
May 15, 2023 (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:

ATTACHMENTS:

- April Summit
- April Budget Workshop
- May Work Session

The Board of Commissioners for the County of Cabarrus met for the 1st Quarter Cabarrus Summit 2023 at the Cabarrus Arena and Events Center in Concord, North Carolina at 6:00 p.m. on Wednesday, April 19, 2023.

Present –	Chairman:	Stephen M. Morris
	Vice Chairman	Lynn Shue
	Commissioners:	Barbara Strang
		Chris Measmer
Absent -	Commissioner:	Kenny Wortman

Also present were Rodney Harris, Deputy County Manager; Assistant County Managers Kelly Sifford and Kyle Bilafer; and Jonathan Weaver, Communication and Outreach Director.

Municipal representatives from Kannapolis, Harrisburg, Mount Pleasant, Midland, Concord, and Locust were also present.

Vice Chairman Shue called the meeting to order at 6:00 p.m.

Welcome

Vice Chairman Shue welcomed municipal elected officials, city managers and other guests.

Introductions / Updates

Dinner

The Board took a dinner break at 6:25 p.m. The meeting resumed at 7 p.m.

Presentation – Youth Commission Summit

Youth commission representatives gave an update on their Youth Summit event that too place earlier in the month. They discussed the activities, attendees, and plans for next year.

Presentation – Town of Harrisburg 50th Anniversary

Representatives from the Town of Harrisburg gave an overview of the festivities for the Town's 50th Anniversary and invited everyone to join them on the celebration.

Closing

Chairman Morris thanked everyone for attending.

Adjourn

The meeting adjourned at 7:52 p.m.

_____
Lauren Linker, Clerk to the Board

DRAFT

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 27, 2023.

Present –	Chairman:	Stephen M. Morris
	Vice Chairman:	Lynn W. Shue
	Commissioners:	Christopher A. Measmer
		Barbara C. Strang
		Kenneth M. Wortman

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

Call to Order

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

Rowan Cabarrus Community College Presentation of FY 2024 Budget Request

Dr. Carol Spalding, Rowan-Cabarrus Community College (RCCC) President, Jonathan Chamberlain, RCCC Chief Officer of College Environment, and Kelly Kluttz, Chief Financial Officer, presented the RCCC FY24 budget request via a PowerPoint presentation that included the following topics:

- 2018-2023 Strategic Plan Themes
  - Learn
  - Engage
  - Innovate
  - Lead
- Key Cabarrus County Programs
- Strategic Priority
  - Land acquisition
  - Renovating current South Campus buildings
  - Constructing a new workforce innovation center
- Fiscal 2024 Cabarrus County Budget Request Summary
  - Current operating budget request - $4,316,003
  - Capital budget request - $58,860,000
  - Total fiscal 2024 budget request - $63,176,003
- Fiscal 2024 Cabarrus County Current Operating Expansion Requests
  - Salary and benefit increases - $51,235
  - Utilities - $74,800
  - Add two staff at 50% - $119,908
  - Preventative maintenance services - $95,000
  - Increased insurance premiums - $23,500
  - Total FY24 current operating expansion request - $364,443
- 2024 Capital Budget Requests
  - Annual capital allocation - $500,000
  - South campus building, S201 HVAC - $5,335,000
  - Couth campus building, S201 phased renovation - $5,500,000
  - Workforce innovations center - $47,000,000
  - Trinity Church Road property acquisition - $525,000
  - Total FY2024 current operating expansion - $58,860,000
- Workforce Innovations Center - $47,000,000
- Trinity Church Road Property Acquisition - $525,000
- Future Capital Budget Requests
  - 2025
    - College station classroom buildout - $800,000
    - Building S203 renovation - $3,310,000
    - NCRC 2nd floor (Nursing) refresh - $3,000,000
  - 2026
    - NCRC 1st floor remodel - $4,000,000
    - Southern Cabarrus Campus land acquisition - $1,000,000
  - 2027
    - NCPC 3rd floor refresh - $3,000,000
  - 2028
    - Dominion Energy property acquisition - $1,500,000
  - 2029
    - South Campus Building 5000 Technical Programs Building - $45,000,000
- Anticipated Needs

There was discussion throughout the presentation. During discussions, Dr. Spalding, Mr. Chamberlain and Ms. Kluttz responded to questions from the Board.

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Kannapolis City Schools Presentation of FY 2024 Budget Request

Kevin Garay, Kannapolis City Schools (KCS) Superintendent, Chip Buckwell, KCS Interim Director of Operations, Scott Rogers, KCS Assistant Director of Operations, Kim Greek, KCS Human Resources and Finance Officer, and Chris Triolo, KCS Assistant Superintendent, presented the KCS FY24 budget request via a PowerPoint presentation that included the following information:

- Who Are We
  - Enrollment – 5,425 students
  - Staff – 835
- Funding Categories
- Cabarrus County Funding
  - Instruction services – $7,047,629 - 74.39%
  - Charter schools - %586,050 – 6.19%
  - Technology support services - $528,078 – 5.57%
  - Building maintenance - $1,042,348 – 11.00%
  - Ground maintenance - $270,364 – 2.85%
- KCS Priorities for Cabarrus County Funding
  - Maintain funding that continues to support current expenses already committed for position, supplements and resources
  - Expand funding to address and increase in the local supplements, rising costs of utilities, Science of Reading implementation and immediate capital needs

There was discussion throughout the presentation. During discussion, Mr. Garay, Dr. Buckwell, Ms. Greek, Mr. Rogers, and Mr. Triolo responded to questions from the Board.

Cabarrus County Schools Presentation of FY 2023 Budget Request

Dr. John Kopicki, Cabarrus County Schools (CCS) Superintendent and Carol Herndon, CCS Chief Financial Officer, presented their FY24 budget request via a PowerPoint presentation that included the following topics:

- Local Budget Development Process
- State Per Pupil Expenditure – Actual vs Inflation Adjusted
- State Per Pupil Rank
- Function/Purpose – FY2022/2023
  - Instructional services – 45.4%
  - Instructional support – 1.7%
  - District office support – 24.6%
  - Utilities – 7.7%
  - Maintenance services – 14.1%
  - Charter schools – 6.5%
- Expenditure Type – FY2022/2023
  - Salaries and benefits – 58%
  - Contracted services – 3%
  - Gas/diesel, oil, tires/tubes – 2%
  - Utilities – 7%
  - Supplies – 5%
  - Computer software – 2%
  - Repairs and Maintenance – 4%
  - Professional development – 2%
  - Computer equipment – 4%
  - Charter schools – 7%
  - Other – 6%
- Locally Funded Positions
  - Certified – 136
  - Classified – 255
- Enrollment Trends
- Programmatic Commitments
  - School resource officers (SROs) in every school
  - 8 SISP resources (2 counselors, 2 psychologists and 4 social workers)
  - Program choice instructional opportunities (IB, STEM, DLI, etc.)
  - VEX robotics opportunities in 34 schools
  - Credit recovery resources in all traditional high schools
  - Instructional technology facilitators in all traditional schools
  - Athletic trainers in most Middle and High schools
- Funding Considerations
  - Operating expense – continuation

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    - Operating expenses – expansion
        - Technology
        - General
        - Facilities and maintenance department (FMD)
    - Capital outlay
- Deferred Operating Expense needs
    - Career and college promise support
    - Junior Achievement Biz Town and Finance Park participation
- Local Budget Operating Expense Requests for CCS and Charter Schools 2023-2024
- Capital Plan

There was discussion throughout the presentation. During discussion, Dr. Kopicki and Ms. Herndon responded to questions from the Board.

Break

The Board took a short break at 6:32 p.m. The meeting resumed at 6:45 p.m.

Fire Departments Tax Increase Request for FY 2024 – Allen

Jason Burnett, Emergency Management Director, stated representatives from four fire departments will be presenting their FY24 tax increase requests.

Chris Whiting, Allen Volunteer Fire Department Deputy Chief, and Mike Faggart, Allen Volunteer Fire Department Board of Directors President, presented a request for a two-cent fire district tax increase (from $.09 to $.11) for FY24. The increase would allow continued service level, purchase required new/upgraded equipment, and building upgrades.

A discussion ensued. During discussion, Mr. Burnett, Jacob Thompson, Fire Marshal, and Mr. Whiting responded to questions from the Board.

Fire Departments Tax Increase Request for FY 2024 – Mount Mitchell

Scott Thomas, Mount Mitchell Volunteer Fire Department Board of Directors President, and Tim Hayes, Mount Mitchell Volunteer Fire Department Board of Directors Vice President, presented a request for a 1.74 cent fire district tax increase, bringing the tax total to $.10 for upcoming FY24. The increase would allow the purchase of needed operating supplies that have seen a cost increase as well as needed/graded radio equipment and staffing.

Fire Departments Tax Increase Request for FY 2024 – Odell

Jeremy Burris, Odell Volunteer Fire Department Chief presented a request for a 1.7 cent fire district tax increase via a PowerPoint presentation, bringing the total to $.085. Topics included the following information:

- About Us
    - ISO rating
    - Response data
    - Automatic aid agreement in place
    - Contract with Kannapolis for western growth area
    - AVL dispatch and closes unit response with Concord and Kannapolis
- Staffing
- Proposed Tax Rate
    - Justification
        - Increased part-time staffing at station 2
        - Increased operational cost
        - Vehicle capital purchases
        - Communications replacement
    - Proposal
        - Increase staffing at station from 2 to 3 personnel
        - Provides two effective firefighting companies
        - Increased call volume
        - Duplication of calls
        - Ensure adequate staffing in district
- Current Tax Rate to Proposed Tax Rate
- Allocated Funding
- Impacts on the Odell Residents

DRAFT

A discussion ensued. During discussion, Mr. Burris, Jacob Thompson, Fire Marshal, and Mike Downs, County Manager; responded to questions from the Board. Dan Brown, Odell Board of Directors Vice President, was also in attendance.

Fire Departments Tax Increase Request for FY 2024 – Rimer

Dylan Ennis, Rimer Volunteer Fire Department Chief, presented a request for a fire district tax increase of 3.2 cents, bringing the total to $.12. The increase would provide for increased cost of standard supplies, utilities, needed/upgraded equipment (radios) and staffing.

Chief Ennis stated that the new ISO rating would reduce resident's homeowner's insurance an average of $300 per year, of which the requested fire district tax increase would cost residents approximately $96 per year. Thus, residents would still see an annual fire savings.

Marty Ritchie, Rimer Volunteer Fire Department Board of Directors President, was also in attendance.

Fire Department – Mount Pleasant Staffing Grant Allotment Request for FY 2024

Dustin Sneed, Mount Pleasant Volunteer Fire Department Chief, presented a request for approval of the sum of $27,240 for a staffing grant (90.8% of the $30,000 grant). This would allow the continuation of the current level of service. Additionally, Mount Pleasant currently does not receive any staffing grant funds.

A discussion ensued. During discussion, Mr. Sneed, Jason Burnett, Emergency Management Director, Mike Downs, County Manager, and Jacob Thompson, Fire Marshal, responded to questions from the Board.

General Board Discussion

There was lengthy discussion regarding tax rates, projects and the schools, and volunteer fire department's needs.

Adjourn

UPON MOTION of Commissioner Strang, seconded by Vice Chairman Shue and unanimously carried, the meeting adjourned at 7:59 p.m.

_____
Lauren Linker, Clerk to the Board

DRAFT

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, May 1, 2023.

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:	Lynn W. Shue
	Commissioners:	Christopher A. Measmer
		Barbara C. Strang
		Kenneth M. Wortman

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

1. Call to Order

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

2. Approval of Agenda

Additions:
Discussion Items for Action
4.1 Cabarrus County Tourism Authority – FY2024 Budget Approval

4.22 DHS - Low Income Household Water Assistance Program Additional Funding

4.23 BOC – General Discussion by the Board

Updated:
Approval of Regular Meeting Agenda
5.1 BOC – Approval of Regular Meeting Agenda

Moved from Regular Meeting to Work Session:
Discussion Items – No Action
3.1 Active Living and Parks – Marketing Presentation

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

3. Discussion Items – No Action

3.1 Active Living and Parks - Marketing Presentation

Londa Strong, Active Living and Parks Director, introduced Jacob Wentink, Park Manager at Camp T.N. Spencer Park. Ms. Strong stated Mr. Wentink is currently enrolled in graduate school at North Carolina in Park Recreation Tourism Sports Management. He was assigned a project with a partner on doing a marketing plan which he is sharing tonight. His project partner was unable to be present for tonight's presentation.

Mr. Wentink presented a PowerPoint presentation regarding a strategic marketing plan focusing on Active Living Centers. The presentation was part of his graduate class project in the Parks, Recreation, Tourism and Sports Management program. The presentation included the following information:

- Introduction (to Active Living Centers)
- Facilities
- Situational Analysis
  - Internal analysis
    - Strengths
      - Facilities
      - Staff
      - Cleanliness
      - Senior games and silver arts
      - Class variety
      - Accessible price point
      - Location

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        - Weaknesses
            - Facilities
            - Staffing limitations
            - Lack of marketing prowess
            - Technology
        - Opportunities
            - Increased social media use
            - New facilities
            - Grant funding
            - Collaboration
            - Growth
        - Threats
            - Residual pandemic effects
            - Limited communication
            - Missing out on current trends
            - Competition
        - Product Portfolio and Positioning
            - Two separate venues with varied amenities, serving different communities
            - Caring compassionate and team-oriented staff
            - Knowledgeable and helpful instructors
            - Class and event variety
            - Perception
            - Branding
- Competitive Analysis
- Customer Analysis and Target Market
- Marketing Goals and Strategies
    - Organizational goals
    - Active living center marketing goals
        - Increase program participation and establish long-term connections that keep visitors engaged
        - Minimize cost per exposure across all marketing channels
        - Increase participation int eh Senior Games
        - Expand current reach on social media
        - Establish awareness and interest in the new facilities before their grand openings
    - Value proposition
    - Marketing survey results
- Marketing Tactics
- Implementation and Evaluation
    - Budget

A brief discussion ensued.

3.2 County Manager - Discussion of Courthouse Plaza Identification

Kyle Bilafer, Assistant County Manager, presented options for the potential naming of the new plaza that surrounds the public entrance of the new Cabarrus County Courthouse. He suggested Courthouse, Union and Means as potential names.

Commissioners Measmer, Wortman, Strang and Shue expressed support for Courthouse Plaza.

Chairman Morris expressed support for Union Plaza.

A discussion ensued.

The consensus of the Board was the preference of naming the new plaza that surrounds the public entrance of the new Cabarrus County Courthouse as Courthouse Plaza.

3.3 Midland Fire Department - Proposed Fire Service Districts and Implementation of a Service Board

On behalf of the 10 volunteer fire departments in the county, Fire Chief Larry Coley, Midland Fire Department, presented a PowerPoint presentation in connection with proposed fire service districts and the implementation of a service board. Items discussed were as follows:

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- A one cent and 1.5 cent and leave the 30% increase for FY2024-25 budget year
- Future growth/needs
- Staffing

A lengthy discussion ensued. During discussion, Mr. Coley and Rodney Harris, Deputy County Manager, responded to questions from the Board.

4. Discussion Items for Action

4.1 Cabarrus County Tourism Authority - FY2024 Budget Approval

Donna Carpenter, Cabarrus Tourism Authority, President, and John Mills, Cabarrus Tourism Authority, Executive Vice President, presented a PowerPoint presentation for the proposed Tourism Authority's FY2023-24 budget totaling $6,475,060. The following information was presented.

- Destination Development – Invested Over $7 Million in Community Projects
- Fy2024 Budget
  - Occupancy Tax Revenue
- FY2023 Cabarrus Visitors Bureau (CVB) Allocations
- FY2023 CVB Allocations
- FY2024 County Retains
  - 5% Administrative Fee - $322,500
  - 5% Sports Development - $322,500

A discussion ensued. During discussion, Mr. Mills and Ms. Carpenter responded to questions from the Board.

4.2 BOC - Appointments to Boards and Committees

Chairman Morris stated information for May appointments to boards and committees has been provided to the commissioners. He asked if anyone had any questions, comments, or concerns regarding the upcoming requests. There were none.

4.3 BOC - Proclamation for Clerks to Board of County Commissioners Week

Chairman Morris read the proclamation aloud.

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

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

Proclamation No. 2023-11

P R O C L A M A T I O N
CLERKS TO THE BOARDS OF COUNTY COMMISSIONERS' WEEK
April 30 through May 6, 2023

WHEREAS: It is imperative to the democratic process that a well-informed citizenry participates in the operation of their local government; and

WHEREAS: The office of the Clerk to the Board provides the communication link between the citizens, the local governing body and administrative departments, and local government partners; and

WHEREAS: The position of clerk is one of the oldest in local government, dating at least to biblical times, and whose term has long been associated with the written word; so, it is that modern-day clerks are official recordkeepers for their counties; and

WHEREAS: North Carolina law requires every board of county commissioners to appoint a clerk and the clerk continues in that position "at the pleasure of the board"; and

WHEREAS: The clerk's most significant statutory duties concern the preparation, filing and safeguarding of local government records, but the statutory duties constitute only a portion of what the clerk actually does; and

DRAFT

WHEREAS: The clerk plays a vital role in county government and provides the written record needed to ensure that the board is accountable to the county's citizens and to other public and private officials; and

WHEREAS: The clerk is sometimes described as "the hub of the wheel" in local government because of the central work that the clerk plays in the government's communication network; and

WHEREAS: As local government becomes larger and more complicated, the clerk's role as a professional, dispassionate provider of information to citizens, government officials, and the media becomes more and more important; and

WHEREAS: Clerks have the opportunity to participate in the North Carolina Association of County Clerks, a very active professional association of public officials dedicated to improving the professional competency of clerks through regular regional and statewide educational opportunities; and

WHEREAS: In cooperation with the University of North Carolina at Chapel Hill School of Government and International Institute of Municipal Clerks (IIMC), the North Carolina Association of County Clerks helps to sponsor a nationally recognized, examination-based certification program that culminates in receipt of the designation of Certified Municipal Clerk; and

WHEREAS: In addition, the North Carolina Association of County Clerks and the School of Government sponsor state certification programs leading to the designation of North Carolina Certified County Clerk, as well as opportunities for experienced clerks to obtain the continuing professional education needed to remain state-certified or to earn an advanced Master Clerk designation; and

WHEREAS: In addition to conducting education programs, the North Carolina Association of County Clerks also directly assists clerks on the job with mentoring programs to provide guidance to assist clerks in their day-to-day work; and

WHEREAS: Clerks, upon their own initiative, participate in these certification and education programs, including annual meetings of the North Carolina Association of County Clerks and the International Institute of Municipal Clerks, which not only improve the operation of their office, but through their achievements and awards bring favorable publicity to the counties in which they serve; and

WHEREAS: Clerks are involved at the state level, as well as in potential legislative and other matters of interest; and

WHEREAS: Although clerks work for the boards of county commissioners, they truly provide public service;

NOW, THEREFORE, the Cabarrus County Board of Commissioners does hereby recognize the week of April 30 through May 6, 2023, as Clerks to the Boards of County Commissioners' Week, and extends our appreciation to our Clerk to the Board Lauren Linker and to our Deputy Clerk to the Board Angela Poplin and to all County Clerks for the vital services they perform and their exemplary dedication to the county they represent.

Adopted this 1st day of May, 2023.

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

ATTEST:
/s/ Lauren Linker
Lauren Linker, Clerk to the Board

4.4 Cabarrus Partnership for Children - Provider Appreciation Day Proclamation

Chairman Morris read the proclamation aloud.

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

Vice Chairman Shue, **MOVED** to adopt the proclamation. Commissioner Strang seconded the motion.

DRAFT

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

Proclamation No. 2023-12

Provider Appreciation Day
May 12, 2023

WHEREAS, Cabarrus County Partnership for Children and other Local, State & National organizations are recognizing Child Care Providers on this day; and

WHEREAS, child care provides a safe, nurturing place for the enrichment and development of millions of children nationwide, and is a vital force in our economy; and

WHEREAS, the pandemic illuminated how indispensable child care providers are for the well-being and economic security of NC's young children, families, and communities.

WHEREAS, child care programs, which are mostly small businesses, run and staffed predominantly by women, are still recovering from health and financial hardships stemming from the pandemic while they have continued to meet the needs our families; and

WHEREAS, NC recognizes that child care has been a lifeline for families, communities, and the economy and as such, has provided much-needed support to providers to help sustain the viability of child care by providing Stabilization Grants and additional support for Smart Start.

WHEREAS, our future depends on the quality of the early childhood experiences provided to young children today; support for high-quality child care represents a worthy commitment to our children's future.

NOW, THEREFORE, be it resolved that we, the Cabarrus County Board of Commissioners hereby proclaim May 12, 2023, as Provider Appreciation Day in Cabarrus County, NC and urge all citizens to recognize Child Care Providers for their important work in our community.

ADOPTED this 1st day of May, 2023.

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

4.5 Centralina Workforce Development Consortium - Resolution for Renewal of Articles of Association and Agreement for the Centralina Workforce Development Consortium

Mike Downs, County Manager, presented a request for approval of the resolution and Articles of Association and Agreement for the Centralina Workforce Development Consortium. He stated state statute requires them to be ratified every four years.

4.6 County Manager - Authorization for One-Time Purchases for Education Partners

Rodney Harris, Deputy County Manager, presented a request for approval for one-time payments and purchases. The funds will be used to:

- Cover the cost of Medicaid claims that exceeded the hold-harmless payment
- Just under $2.8 million to address needs for Emergency Medical Services, Information Technology Services, and the Sheriff's Office, among others
- $1,704,519 for Cabarrus County Schools ($1,520,757) and Kannapolis City Schools ($183,762) to address one-time curriculum and professional development needs
- An additional $132,399 transferred from the Board's charter school contingency to CCS and KCS for equal per pupil funding for charter school students

Carol Herndon, Cabarrus County Schools (CCS), Chief Financial Officer, and Sara Reeves, CCS Chief Academic Officer, provided additional information regarding the request for the one-time funding.

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Kevin Garay, Kannapolis City Schools (KCS), Superintendent, and Chris Triolo, KCS Assistant Superintendent, presented information regarding the academic programs and implementations connected with these funds.

4.7 Finance - Capital Project Fund Completions

Jim Howden, Finance Director, presented budget amendments and ordinances to reflect completed projects from the County Capital Projects Fund (Fund 380) and the School Capital Projects Fund (Fund 390) and to transfer any excess funds to the Community Investment Fund. Mr. Howden also responded to questions from the Board.

4.8 Finance - CARES Act Relief Fund 440

Jim Howden, Finance Director, presented a request for approval of a budget amendment and project ordinance to close any completed projects associated with Fund 440 Coronavirus Aid, Relief and Economic Security (CARES) Relief Fund and the corresponding general ledger accounts.

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

4.9 Finance - Department of Aging - Fund 532

Jim Howden, Finance Director, reported each year the multi-year funds are evaluated and updated. Fund 532, Department of Aging, has collected additional contributions/donations. Therefore, a budget amendment and updated project ordinance will be needed.

4.10 Finance - JCPC Budget Revisions

Jim Howden, Finance Director, reported the JCPC (Juvenile Crime Prevention Council) program, Transforming Youth Movement - Fostering Solutions has re-evaluated the contract with their provider and chose to terminate the contract since the provider was unable to provide the service agreed upon. The remaining funds are eligible to be re-allocated within the County's current JCPC programs via a process called In-County Transfer. However, the North Carolina Department of Public Safety's (NCDPS) deadline is today, May 1, 2023 at midnight.

On April 19, 2023 the Cabarrus JCPC council voted and approved the following requests for the funds to be distributed to programs in the following manner and to be represented on the revised FY22-23 funding plan:

- Fostering Solutions – reduced its total DPS/JCPC funds to $8,220 and its reported in-kind to $2,520
- Get Hired Program- $2,900 of DPS/JCPC funds added
  - With an additional $2,376 of In-kind brought to the table
    - These funds will allow for youth to receive additional stipends for engagement in the program and completing time at worksites
    - (Bringing total DPS-JCPC funding to $48,315 & local in-kind to $14,376)
- SHIFT Mentoring - $3,200 of DPS/JCPC funds added
  - With an additional $1,170 of In-kind brought to the table
    - These funds will allow the program to expand its summer programming
    - (Bringing total DPS-JCPC funding to $57,700 & local in-kind $17,970)
- YDI Vocational and Career Development Academy - $6,750 of DPS/JCPC funds added
  - With an additional $900 of In-kind brought to the table
    - These funds will allow for additional youth to be served and be engaged/trained in Vocational Trades
    - (Bringing total DPS/JCPC funding to $57,750 & local in-kind $18,000)

Additionally, a budget revision was submitted and approved by the JCPC on April 19, 2023 to allow YDI Family Life Skills Academy to modify its reported local in-kind from the use of its in-kind space to allow for volunteer hours to be counted as the program did not fully utilize the in-kind space as indicated on the prior budget.

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

UPON MOTION of Vice Chairman Shue, seconded by Commissioner Measmer and unanimously carried, the Board approved budget revisions with in-house transfer of funds between programs.

UPON MOTION of Commissioner Measmer, seconded by Commissioner Strang and unanimously carried, the Board approved Youth Development Initiatives to modify their local in-kind funding from in-kind space to volunteer hours.

A brief discussion ensued with Mr. Howden responding to questions from the Board.

4.11 Finance - Lottery Funding - Cabarrus County

Jim Howden, Finance Director, reported lottery proceeds in the amount of $2,300,000 were included in the FY 2023 Community Investment Fund budget to pay a portion of debt service related to public school debt.

The Cabarrus County School application requested $2,017,100 and the Kannapolis City School application requested $282,900, for a total of $2,300,000. A budget amendment and capital project ordinance were included for approval.

Mr. Howden also responded to questions from the Board.

4.12 Finance - Lottery Proceeds Allocated for Rowan County Schools Within the Kannapolis City School District

Jim Howden, Finance Director, reported lottery revenue projects approved and allocated for Kannapolis City Schools that are located within Rowan County are being transferred by the State to the Cabarrus County Disbursing Account. We will be the caretaker of these funds. Therefore Cabarrus County will be responsible for recording the revenue and expenditures for the Rowan County projects in the Cabarrus Public School Building Capital Fund.

Rowan County plans to submit a request for $272,148.50 to the State of North Carolina to be used for debt service. Since the funds will pass through Cabarrus County's general ledger, we will be required to prepare an updated project ordinance and related budget amendment.

4.13 Finance – Sheriff’s Department Fund 461

Jim Howden, Finance Director, reported each year the multi-year funds are evaluated and updated based on current revenue trends.

Fund 461, Sheriff's Department Fund collects and appropriates Federal and State funds received specifically for the Cabarrus County Sheriff's Department.

Based on the Finance Department's evaluation, a budget amendment has been prepared to reflect additional revenues for the remainder of the year. An updated project ordinance for the Sheriff's Department Fund (Fund 461) was provided for approval.

4.14 Finance - Small Project Fund 460

Jim Howden, Finance Director, reported Fund 460, Small Project Fund, received additional fund revenues and federal and state grants received specifically for use by a Cabarrus County Department.

Upon the Finance Department's review and evaluation, a budget amendment and updated project ordinance will be needed

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

4.15 Finance / Library - Afton Ridge Library and ALC

Jim Howden, Finance Director, reported the estimated cost for the new Cabarrus County Library and Active Living Center at Afton Ridge is estimated to be $30,400,000.

The General Fund has already budgeted $2,400,00; it is requested the additional $28,000,000 come from future debt proceeds.

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A budget amendment was provided to show the breakdown of the estimated total cost of $30,400,000 comprised of engineering, construction, architecture, furniture and equipment, and land improvement expenditures.

Rodney Harris, Deputy County Manager, provided additional information regarding costs and the private partnership on this program.

A discussion ensued. During discussion, Mr. Harris, Kyle Bilafer, Assistant County Manager, and Mike Downs, County Manager, responded to a variety of questions from the Board.

4.16 Human Resources - Compensation Projects

Lundee Covington, Finance Director, presented information regarding proposed compensation changes. The first was regarding a $2,500 sign on bonus for new employees, which would pay out after two weeks of full time employment. The Legal Department is checking into this further for a contract that would include claw back clauses for the contract term of two years.

Secondly, was a $1,000 referral fee for current employees referring a new employee to Cabarrus County. The employee doing the referring would receive $500 after the new employee reached six months of full time employment and another $500 after the one year period providing the referring employee was still an employee at the time of pay out.

A lengthy discussion ensued. During discussion, Ms. Covington, Mike Downs, County Manager, and Evan Lee, General Counsel, responded to questions from the Board.

Next, Ms. Covington presented a request to immediately reclass the Social Worker Investigative/Assessment and Treatment (SWIAT)two levels, which would equal a 10 percent pay increase as means to retain employees and attract new applicants for these jobs ("hot jobs"). She also included a 10 percent pay increase for those who work in the area with SWIAT staff.

A discussion ensued. During discussion, Ms. Covington, Mike Downs, County Manager, and Rodney Harris, Deputy County Manager, responded to questions from the Board.

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

Commissioner Measmer, **MOVED** to approve the recommended Social Worker Investigative/Assessment and Treatment (SWIAT) compensation reclass and pay increase project for implementation as funding and project time allows in FY23 or FY24 with budget approval to the aforementioned. Commissioner Strang seconded the motion.

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

4.17 Infrastructure and Asset Management - Recommended Approval of Preferred Alternates for Cabarrus County Library and Active Living Center at Mt. Pleasant and Virginia Foil Park

Kyle Bilafer, Assistant County Manager, reported NCGS 133-3 requires performance standards to be used when specifying products. The statute also allows preferred brands of equipment to be bid as an alternate on the Cabarrus County Library and Active Living Center at Mt. Pleasant and Virginia Foil Park provided that the performance standards were approved by the Cabarrus County Board of Commissioners. To be approved, the alternate must either provide a cost savings or maintain/improve the functioning of a process or system affected by the brand alternate. Approval is requested for the preferred brand alternates for the equipment. Michael Miller, Design and Construction Director, was also in attendance.

4.18 Infrastructure and Asset Management - Selection of Construction Manager at Risk for the Cabarrus County Behavioral Health Center

Michael Miller, Design and Construction Director, reported on February 24, 2023 Cabarrus County advertised for Construction Manager at Risk firms for the proposed Cabarrus County Behavioral Health Center. Ten (10) Request for Qualifications (RFQ) submittals were received on March 17, 2023. An internal selection committee reviewed all ten (10) submissions and moved two (2) of the

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firms to the shortlist for interviews. The interviews took place on April 17, 2023. The selection committee recommends Messer Construction Company to be the Construction Manager at Risk for the Cabarrus County Behavioral Health Center.

A discussion ensued. During discussion, Kyle Bilafer, Assistant County Manager, responded to questions from the Board.

4.19 Planning and Development - 2020-2021 HOME Program Amendment to Project Activities

Kelly Sifford, Assistant County Manager, presented a request to change the 2020-2021 HOME program project plan. Staff had initially planned to collaborate with the City of Concord to construct a new home to be sold to a qualified homeowner. In the summer of 2020, the cost to construct a new home dramatically increased, leaving a shortage from the HOME funds available. After waiting to see if costs would come down, staff has determined that the price point is higher than we can afford. Therefore, staff recommends a partnership with Habitat for Humanity to construct a new home at 285 Academy Street in the City of Concord for a Habitat client with the 2020-2021 HOME funds. It is further recommended any remaining funds be applied toward the down payment assistance program. A public hearing will be needed and a letter with the associated documentation be sent to the City of Concord to document the plan amendment.

4.20 Planning and Development - Proposed Budget Amendment for Blue Cross and Blue Shield of North Carolina's Healthy Home Initiative Program

Susie Morris, Planning and Development Director, presented a proposed budget amendment to accept the funds for the Blue Cross and Blue Shield of North Carolina's Healthy Home Initiative for calendar year 2023 in the amount of $12,500. A Memorandum of Understanding will also be needed.

4.21 Sheriff's Office - New RMS, JMS and CAD Software Contract Request

Chief Deputy Tessa Burchett, Cabarrus County Sheriff's Office, presented a request to enter into a contract with Motorola Solutions for a new RMS (Records Management System), JMS (Jail Management System), and CAD (Computer Aided Dispatch) system.

Todd Shanley, Information Technologies Services Chief Information Officer, provided information regarding funds available and implementation.

A discussion ensued. During discussion, Mr. Shanley, Chief Burchett and Rodney Harris, Deputy County Manager, responded to questions from the Board.

4.22 DHS - Low Income Household Water Assistance Program Additional Funding

Lora Lipe, Department of Human Services Economic Support Services Program Administrator, presented a request for approval of a budget amendment for Federal funds received in the amount of $30,000 for the Low Income Household Water Assistance Program. A County match is not required.

4.23 BOC – General Discussion by the Board

The Board discussed the process(es) of the Consent Agenda items. Also, discussed, was the possible need for general comments from the commissioners on the work session meeting agenda.

Commissioner Wortman commented on his attendance at a meeting of the Logan Community wherein a need for a Board liaison arose. Commissioner Wortman requested the creation of such a position and volunteered to fill it. The meetings occur the fourth Monday of each month.

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

UPON MOTION of Commissioner Wortman, seconded by Vice Chairman Shue and unanimously carried, the Board approved the creation of a Board liaison position for the Logan Community to be filled by Commissioner Wortman for the remainder of the 2023 calendar year.

Commissioner Strang discussed the placement of Emergency Medical Services, Fire Departments and the Sheriff's Office on the agenda. Mike Downs, County Manager, provided additional comments.

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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 Wortman, seconded by Vice Chairman Shue and unanimously carried, the Board approved the agenda as follows for the May 16, 2023 regular meeting as presented.

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

Recognitions and Presentations
- DHS - Transportation 2023 State Roadeo Competition
- Veterans Services - Memorial Day 2023 Proclamation

Consent
- Appointments - Public Health Authority of Cabarrus County
- Appointments and Removals - Active Living and Parks Commission
- Cabarrus County Tourism Authority - FY2024 Budget Approval
- Centralina Workforce Development Consortium - Resolution for Renewal of Articles of Association and Agreement for the Centralina Workforce Development Consortium
- County Manager - Authorization for One-Time Purchases for Education Partners
- DHS - Low Income Household Water Assistance Program Additional Funding
- Finance - Capital Project Fund Completions
- Finance - CARES Act Relief Fund 440
- Finance - Department of Aging - Fund 532
- Finance - Lottery Funding - Cabarrus County
- Finance - Lottery Proceeds Allocated for Rowan County Schools Within the Kannapolis City School District
- Finance – Sheriff’s Department Fund 461
- Finance - Small Project Fund 460
- Finance / Library - Afton Ridge Library and ALC
- Human Resources - Compensation Projects
- Infrastructure and Asset Management - Recommended Approval of Preferred Alternates for Cabarrus County Library and Active Living Center at Mt. Pleasant and Virginia Foil Park
- Infrastructure and Asset Management - Selection of Construction Manager at Risk for the Cabarrus County Behavioral Health Center
- Planning and Development-Proposed Budget Amendment for Blue Cross and Blue Shield of North Carolina’s Healthy Home Initiative Program
- Sheriff's Office - New RMS, JMS and CAD Software Contract Request
- Tax Administration - Refund and Release Reports - April 2023

New Business
- Planning and Development - 2020-2021 HOME Program Amendment to Project Activities - Public Hearing 6:30 p.m.
- County Manager - Presentation of the FY24 Recommended Budget

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 - April 2023 Monthly Summary Report

6. Adjourn

UPON MOTION of Commissioner Strang, seconded by Vice Chairman Shue and unanimously carried, the meeting adjourned at 7:23 p.m.

_____
Lauren Linker, Clerk to the Board

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CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
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 19, 2023

ADDITIONS:

New Business
F.1 JCPC – Funding Appeal
F.2 Sheriff's Office – Budget Amendment -Tek84 Body Scanner

UPDATED:

Old Business
G.2 Finance - Capital Improvement Plan ("CIP") Funded Projects in the FY2024 General Fund Budget

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Recognitions and Presentations

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

BRIEF SUMMARY:
Since 1985, people in the United States have celebrated Park and Recreation Month in July to promote building strong, vibrant and resilient communities through the power of parks and recreation and to recognize the more than 160,000 full-time park and recreation professionals — along with hundreds of thousands of part-time and seasonal workers and volunteers — that maintain our country's local, state and community parks.

This year's theme —"Where Community Grows" —celebrates the vital role park and recreation professionals play in bringing people together, providing essential services and fostering the growth of our communities.

REQUESTED ACTION:
Motion to adopt the proclamation.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

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

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Proclamation



DESIGNATION OF JULY AS PARK AND RECREATION MONTH

WHEREAS, Parks and Recreation and Active Living Centers are an integral part of communities throughout this country, including Cabarrus; and

WHEREAS, Parks and Recreation and Active Living Centers promotes health and wellness, improving the physical and mental health of people who live near parks and active living centers; and

WHEREAS, Parks and Recreation and Active Living Centers promotes time spent in nature, which positively impacts mental health by increasing cognitive performance and well-being, and alleviating illnesses such as depression, attention deficit disorders, and Alzheimer's; and

WHEREAS, Parks and Recreation and Active Living 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 and Recreation and Active Living Centers programming and education activities, such as out of-school time programming, youth sports, Senior Games, and environmental education, are critical to childhood development; and

WHEREAS, Parks and Recreation and Active Living Centers increases a community's economic prosperity through increased property values, expansion of the local tax base, increased tourism, the attraction and retention of businesses, and crime reduction; and

WHEREAS, Parks and Recreation and Active Living Centers are fundamental to the environmental well-being of our community; and

WHEREAS, Parks and Recreation and Active Living Centers are essential and adaptable infrastructure that makes our communities resilient in the face of natural disasters and climate change; and

WHEREAS, our Parks and Recreation and Active Living Centers areas ensure the ecological beauty of our community and provide a place for 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, Cabarrus County recognizes the benefits derived from Parks and Recreation and Active Living Centers resources.

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

Adopted this 19th day of June, 2023.

_____

Stephen M. Morris, Chairman
Cabarrus County Board of Commissioners

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Recognitions and Presentations

SUBJECT:
Cabarrus Soil and Water Conservation - Contest Winners

BRIEF SUMMARY:
We would like to honor our contest winners from this school year. These are our annual contests for bookmarks, posters, essays, power points and public speaking. This year's theme was "Water...the Cycle of Life".

REQUESTED ACTION:
No action required.

EXPECTED LENGTH OF PRESENTATION:
10 Minutes

SUBMITTED BY:
Tammi Remsburg, Resource Conservation Coordinator

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- List of Contest Winners

2023 Contest Winners Cabarrus Soil & Water Conservation District		School
Kindergarten Bookmark		
1st	Tatum Tha	Patriots Elementary School
2nd	Aria Jobe	Rocky River Elementary
3rd	Victoria Valladares	Rocky River Elementary
First Grade Bookmark		
1st	Leah Riley	Patriots Elementary School
2nd	Elizabeth Etchison	Patriots Elementary School
3rd	Michaela Berger	Weddington Hills
Second Grade Bookmark		
1st	Elakshi Agarwal	Patriots Elementary School
2nd	Sawyer Proper	Rocky River Elementary
3rd	Victor Dabic	Patriots Elementary School
Third Grade Poster		
1st	Ashley Jara Aliaga	Rocky River Elementary
2nd	Sarayu Penugonda	Patriots Elementary School
3rd	Hudson Morneau	Jackson Park Elementary
Fourth Grade Poster		
1st	Arianis Serrano Gonzalez	Rocky River Elementary
2nd	Janeah Alexander	Patriots Elementary School
3rd	Olivia Manzella	Jackson Park Elementary
Fifth Grade Poster		
1st	Ranya Balimi	Patriots Elementary School
2nd	Skylar Haynes	Jackson Park Elementary
3rd	Melanie Prinz	Jackson Park Elementary
Sixth Grade Essay		
1st	Bailey Johnson	CC Griffin STEM Middle School
2nd	Nicholas Kintz	CC Griffin STEM Middle School
3rd	Nicholas Ceciliana	CC Griffin STEM Middle School

Sixth Grade Public Speaking		
1st	Jessa Carter	CC Griffin STEM Middle School
2nd	Nick Shaw	CC Griffin STEM Middle School
3rd	Maliya Moore	CC Griffin STEM Middle School
Seventh Grade Public Speaking		
1st	Arden (Macy) Wicker-Pope	Mount Pleasant Middle School
2nd	Eva Hernandez	Mount Pleasant Middle School
3rd	Manasvi Veeramallu	CC Griffin STEM Middle School
Sixth Grade Slide Show		
1st	Grace Beam	CC Griffin STEM Middle School
2nd	Aiden Townley	CC Griffin STEM Middle School
3rd	Isabella Jackson	CC Griffin STEM Middle School
High School Essay		
1st	Lillian Hays	Mount Pleasant High School
High School Public Speaking		
1st	Maggie Garrido	Mount Pleasant High School

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Recognitions and Presentations

SUBJECT:
Human Resources - Recognition of Teresa Hillie on Her Retirement from Cabarrus County Department of Human Services

BRIEF SUMMARY:
After 22 years of service to Cabarrus County and its citizens, Teresa Hillie will retire July 1, 2023.

REQUESTED ACTION:
Recognize Teresa Hillie for her many years of dedicated service to Cabarrus County and its citizens.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Lundee Covington, Human Resources Director
Karen Calhoun, Human Services Director

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Board of Equalization and Review

BRIEF SUMMARY:
Keith Troutman and Helen McInnis currently serve as 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, 2023. Each have expressed their desire to remain on the Board. Keith Troutman and Helen McInnis have served on the Board since their initial terms in 2011 and 2014 respectively so an exception to the “length of service” provision of the appointment policy will be needed for them.

REQUESTED ACTION:
Motion to reappoint Keith Troutman and Helen McInnis to the Board of Equalization and Review for three-year terms ending June 30, 2026, including an exception to the length of service provision of the Appointment Policy for Keith Troutman and Helen McInnis.

Motion to reappoint William Ferris to the Board of Equalization and Review as an Alternate Representative for a one-year term ending June 30, 2024.

EXPECTED LENGTH OF PRESENTATION:
1 Minute

SUBMITTED BY:
David Thrift, Tax Administrator

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Roster
- Applications on File

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**
	REAPPOINTMENT: 06/20/2022
	TERM EXPIRING: 06/30/2025
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
(exception to appt. policy)	**REAPPOINTMENT:** 06/20/2022
	TERM EXPIRING: 06/30/2025
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
	REAPPOINTMENT: 06/20/2022
	TERM EXPIRING: 06/30/2023

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, 2023

William Ferris*	1417 12th Fairway Drive	Concord, NC 28027
Helen McInnis*^	5517 Hammermill Drive	Harrisburg, NC 28075
Keith Troutman*^	60 Burrage Road	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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Jury Commission

BRIEF SUMMARY:
Dianne Berry's term on the Jury Commission ends June 30, 2023. Ms. Berry would like to serve another term. Ms. Berry has served on this Commission since 2017. An exception to the length of service provision of the Appointment Policy will be needed for her.

REQUESTED ACTION:
Motion to reappoint Dianne Berry to the Jury Commission for a two-year term ending June 30, 2025; including an exception to the length of service provision of the Appointment Policy.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Lauren Linker, Clerk to the Board

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Roster
- Applications on File

JURY COMMISSION

3-Member Commission

2-Year Terms

Appointed by Clerk of Superior Court

Appointed by Senior Regular Resident Superior Court Judge

APPOINTED BY BOARD OF COUNTY COMMISSIONERS

Ms. Dianne Berry	**APPOINTMENT:**	**06/19/17**
532 China Grove Road	**REAPPOINTMENT:**	**06/17/19**
Kannapolis, NC 28083	**REAPPOINTMENT:**	**06/21/21**
	TERM EXPIRING:	**06/30/23**

G.S. 9-2

Jury Commission
Applications on File
May 18, 2023

Dianne Berry*^	532 China Grove Road	Kannapolis, NC 28083
Karole Northrup	2000 Normandy Road	Kannapolis, NC 28081
Dale Wright	10101 S Gemini Springs Drive	Kannapolis, NC 28081

* 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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Region F Aging Advisory Committee

BRIEF SUMMARY:
James Bernacki serves on the Region F Aging Advisory Committee (RFAAC) and his term expires June 30, 2023. It is recommended that Mr. Bernacki be reappointed to the Region F Aging Advisory Committee to serve another term.

REQUESTED ACTION:
Motion to reappoint James Bernacki to the Region F Aging Advisory Committee for a two-year term ending June 30, 2025.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Anthony Hodges, Adult and Aging Service Program Administrator
HCCBG Lead Agency Representative

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Roster
- Applications on File

REGION F AGING ADVISORY COMMITTEE

CENTRALINA COUNCIL OF GOVERNMENTS

Jean Chandler **4977 Hilton Lake Road** **Kannapolis, NC 28083**	**APPOINTMENT:** ***(unexpired term)*** **REAPPOINTMENT:** **REAPPOINTMENT:** **REAPPOINTMENT:** **APPOINTMENT:** **REAPPOINTMENT:** **REAPPOINTMENT:** **APPOINTMENT:** **TERM EXPIRING:**	**03/18/13*** **06/17/13** **06/15/15** **09/18/17** **09/16/19*^** **06/15/20**^** **11/15/21**** **09/19/22** **06/30/24**
James Bernacki **2479 Willow Pond Lane SE** **Concord, NC 28025**	**APPOINTMENT:** **TERM EXPIRING:**	**11/15/21** **06/30/23**
Vacant	**APPOINTMENT:** **TERM EXPIRING:**	
Vacant **(Alternate)**	**APPOINTMENT:** **TERM EXPIRING:**	

Contact: Linda Miller & Evelyn Pressley

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

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

^ Ida Mills previously served as the alternate and was appointed as a delegate member. Jean Chandler previously served as a delegate member and was appointed to serve as an alternate.

Note: Per the by-laws, Delegate terms are for two years. Alternate terms are for one year. Terms begin on July 1 and end on June 30.

Region F Aging Advisory Committee
Applications on File
May 18, 2023

James Bernacki	Current Member	2479 Willow Pond Lane SE	Concord, NC 28025

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments - Water and Sewer Authority of Cabarrus County

BRIEF SUMMARY:
Robert Richie's term on the Water and Sewer Authority of Cabarrus County as an At-large representative ends June 30, 2023. Mr. Ritchie would like to be considered for reappointment. He has served on this board since 2011. If reappointed, an exception to the length of service provision of the Appointment Policy will be needed for him.

REQUESTED ACTION:
Motion to reappoint Robert Richie to the Water and Sewer Authority as the At-large representative for a three-year term ending June 30, 2026; including an exception to the length of service provision of the Appointment Policy.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Lauren Linker, Clerk to the Board

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Roster
- Applications on File

WATER AND SEWER AUTHORITY
3-Year Terms

COUNTY APPOINTEES

Jonathan Marshall **P.O. Box 707** **Concord, NC 28026**	**APPOINTMENT: 11/19/12*** **(unexpired term)** **REAPPOINTMENT: 06/15/15** **REAPPOINTMENT: 05/21/18^** **REAPPOINTMENT: 06/21/21^<** **TERM ENDING: 06/30/24**
Lynn Shue **P.O. Box 707** **Concord, NC 28026**	**APPOINTMENT: 12/21/20** **(unexpired term)** **REAPPOINTMENT: 06/21/21** **TERM ENDING: 06/30/24**

CITY OF CONCORD APPOINTEES

Jennifer Parsley-Hubbard **Concord City Council**	**TERM ENDING: 06/2023**
Jeff Corley **City of Concord – Vice Chairman**	**TERM ENDING: 06/2024**

CITY OF KANNAPOLIS APPOINTEES

Darrell Hinnant **Kannapolis City Council**	**TERM ENDING: 06/2023**
Mike Legg - Chairman **City of Kannapolis**	**TERM ENDING: 06/2024**

TOWN OF HARRISBURG APPOINTEE

Rob Donham	**TERM ENDING: 06/2025**

TOWN OF MT. PLEASANT APPOINTEE

Jim Sells	**TERM ENDING: 06/2025**

AT-LARGE **(Appointed by the County with advice of other organizing political subdivisions of the Authority)**

Robert Ritchie **6561 Rocky River Road** **Concord, NC 28025**	**APPOINTMENT: 06/20/11** **REAPPOINTMENT: 05/19/14** **REAPPOINTMENT: 06/19/17** **REAPPOINTMENT: 06/15/20** **TERM EXPIRING: 06/30/23**

Resolution Adopted 2/17/92 to establish Authority

***Effective 12/03/2012. Also, exception granted for "residency" and "service on multiple boards" provisions of the Appointment Policy.**

^Exception to the "residency" provision of the Appointment Policy.

< Exception to the "length of service" provision of the Appointment Policy.

Michael Wilson – Executive Director
(Meetings – 3rd Thursday, 5:00 p.m. – WSACC)

Water & Sewer Authority of Cabarrus County
Applications on File
April 24, 2023

Hunter Hall**	3365 Rockwell Road	Rockwell, NC 28138
Mohammed Idlibi*	3505 McKees Court	Harrisburg, NC 28075
Chris Jarrett*	1915 Birchbrook Court	Harrisburg, NC 28075
JP Ledermann	9500 Mooresville Road	Concord, NC 28027
Lara Pons*	1886 Waldeck Court	Mt. Pleasant, NC 28124
Robert Ritchie^	6561 Rocky River Road	Concord, NC 28025

*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.

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

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments and Removals - Cabarrus County Tourism Authority

BRIEF SUMMARY:
The Cabarrus County Tourism Authority has 4 seats that need to be appointed for the term commencing July 1, 2023 and ending on June 30, 2026. The nominating group and their nominees are as follows:

- Cabarrus County - Seat #1 Mike Downs*~
- Cabarrus County Tourism Authority - Seat #2 Greg Walter*^
- Cabarrus County Tourism Authority - Seat #10 Steve Steinbacher*
- Cabarrus Regional Chamber of Commerce - Seat #3 Alison Paladino

*Reappointment
^An exception the residency provision of the Appointment Policy will be needed
~An exception the multiple boards provision of the Appointment Policy will be needed

REQUESTED ACTION:
Motion to remove Pat Horton (Seat #3) from the Cabarrus County Tourism Authority and thank her for her service.

Motion to reappoint Mike Downs (Seat #1), Greg Walter (Seat #2) and Steve Steinbacher (Seat #10) to the Cabarrus County Tourism Authority for three-year terms commencing July 1, 2023 and ending June 30, 2026; including an exception to the residency provision of the Appointment Policy for Mr. Walter; and an exception to the service on multiple boards provision of the Appointment Policy for Mr. Downs.

Motion to appoint Alison Paladino (Seat #3) to the Cabarrus County Tourism Authority for a

three-year term commencing July 1, 2023 and ending June 30, 2026.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Owen Parker, Chairman, Cabarrus County Tourism Authority Board of Directors
Lauren Linker, Clerk to the Board

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Letters of Recommendation
- Roster
- Applications on File

May 24, 2023

Dear Cabarrus County Board of Commissioners:

This letter is to notify you of the nominee for seat #10 on the Cabarrus County Tourism Authority Board of Directors. The nominee is:

Steve Steinbacher

The Tourism Authority would like to reappoint Steve Steinbacher for Seat #10 for a term commencing July 1, 2023 and ending on June 30, 2026.

Sincerely

Owen Parker
Chairman, Board of Directors
Cabarrus County Tourism Authority

May 24, 2023

Dear Cabarrus County Board of Commissioners:

This letter is to notify you of the nominee for seat #2 on the Cabarrus County Tourism Authority Board of Directors. The nominee is:

Greg Walter

The Tourism Authority would like to reappoint Greg Walter for Seat #2 for a term commencing July 1, 2023 and ending on June 30, 2026.

Sincerely

Owen Parker
Chairman, Board of Directors
Cabarrus County Tourism Authority

The Chamber
LEADING BUSINESS IN CABARRUS

April 19, 2023

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 Alison Paladino 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 three (3), beginning July 1, 2023 and expire on June 30, 2026.

Thank you for your consideration.

Best regards,

Barbi Jones

Barbi Jones
Executive Director

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)		
Devante' Watkins 3590 Covington Commons Avenue SW Concord, NC 28027	7	APPOINTMENT: 03/20/23 (unexpired term) TERM EXPIRING: 06/30/25
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		
Angela Brown 2664 Kinsley Avenue NW Concord, NC 28027	8	APPOINTMENT: 06/20/22 TERM EXPIRING: 06/30/25
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
REAPPOINTMENT: 06/20/22
TERM EXPIRING: 06/30/25

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
James Ross 9 **APPOINTMENT:** 11/21/22
3872 Meadow Ridge Drive NW (unexpired term)
Concord, NC 28027 **TERM EXPIRING:** 06/30/25

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 25, 2023

Sujit Chemburkar	8213 Appaloosa Lane	Charlotte, NC 28215
Tyler Conley	3719 Solen Drive	Harrisburg, NC 28075
Chris Cosner	7277 Miami Church Road	Concord, NC 28025
Matthew Dober	2774 Berkhamstead Circle	Concord, NC 28027
Mike Downs**	P.O. Box 707	Concord, NC 28026
Keith Overcash	3211 Keady Mill Loop	Kannapolis, NC 28081
Alison Paladino	1564 Duckhorn Street NW	Concord, NC 28027
James Ross	3872 Meadow Ridge Drive NW	Concord, NC 28027
Steve Steinbacher	1513 Hansom Lane	Concord, NC 28027
Greg Walter*	12539 Overlook Mountain Drive	Charlotte, NC 28216

*An exception to the residency provision of the appointment policy will be needed
**An exception to the multiple boards/committees appointment policy will be needed

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments and Removals - Centralina Workforce Development Board

BRIEF SUMMARY:
The terms on the Centralina Workforce Development Board for Dr. Carol Spalding, Education representative and Beatriz Rodriguez, Private Sector representative, will end June 30, 2023. Both have asked to step down from their positions on the Board. It is requested to remove their names from the roster.

David Hollars, Centralina Workforce Development Board Executive Director, has requested that the Education position on the Board be rotated to a Private Sector position. Per Board bylaws, nominations have been solicited from the Cabarrus Economic Development Commission. Anna Badiru and Chelsea Rigler have been recommended to be appointed to fill the vacant positions. A letter in this regard is included in the agenda. Neither Ms. Badiru nor Ms. Rigler are residents of Cabarrus County. An exception to the residency provision of the Appointment Policy will be needed for them.

REQUESTED ACTION:
Motion to remove Dr. Carol Spalding and Beatriz Rodriguez from the Centralina Workforce Development Board roster and thank them for their service.

Motion to rotate the Education position to a Private Sector position.

Motion to appoint Anna Badiru and Chelsea Rigler to the Centralina Workforce Development Board as Private Sector representatives for two-year terms ending June 30, 2025; including an exception to the residency provision of the Appointment Policy for both Ms. Badiru and Ms. Rigler.

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:

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.centralinaworkforce.com

May 3, 2023

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, 2023. ***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 for 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	06/30/2024	Present – 10	Proxies - 0
Milton Chicas	Private Sector	06/30/2024	Present – 5	Proxies – 5
Dr. Carol Spalding	Education	06/30/2023	Present – 8	Proxies - 2
Beatriz Rodriguez	Private Sector	06/30/2023	Present – 7	Proxies – 3

SPECIFIC REQUESTS

Please reappoint the following individuals or obtain nominations and appoint two (2) individuals to fill the terms of July 1, 2023 - June 30, 2025. Nominations and appointments to fill the categories of ***Private Sector/Business*** are requested.

Dr. Carol Spalding (Rowan-Cabarrus Community College) has asked to step down from the Board. Her position on the Board is being rotated to a Private Sector/Business representative. Per Board bylaws, nominations have been solicited from the Cabarrus Economic Development Commission. **Anna Badiru with Eli Lilly** has been recommended. Ms. Badiru has been contacted, and she has completed the Centralina WDB Membership application (see attached), and she has agreed to serve if appointed.

The Centralina WDB requests that Ms. Anna Badiru be appointed as a PRIVATE SECTOR representative for Cabarrus County.

Beatriz Rodriguez (Atrium Health – Cabarrus) has also asked to step down from the Board. Per Board bylaws, nominations for the healthcare sector have been solicited from the Cabarrus Economic Development Commission. **Chelsea Rigler with Atrium Health-Cabarrus** has been recommended. Ms. Rigler has been contacted, and she has completed the Centralina WDB Membership application (see attached), and she has agreed to serve if appointed.

The Centralina WDB requests that Ms. Chelsea Rigler be appointed 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, 2023**.

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*^** **REAPPOINTMENT: 06/20/22*^** **TERM EXPIRING: 06/30/24**
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*^** **REAPPOINTMENT: 06/20/22*^** **TERM EXPIRING: 06/30/24**

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

Centralina Workforce Development Board

Applications on File
May 8, 2023

Anna Badiru*	1420 Circle Trace Road	Wesley Chapel, NC 28110
Chris Jarrett**	1915 Birchbrook Court	Harrisburg, NC 28075
Millicent Malit**	3178 Helmsley Court	Concord, NC 28027
Norman McCullough	2315 Montford Ave NW	Concord, NC 28027
Chelsea Rigler*	618 Daventry Court	Clover, SC 29710
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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments and Removals - Juvenile Crime Prevention Council

BRIEF SUMMARY:
Terms for the following JCPC (Juvenile Crime Prevention Council) members end June 30, 2023: Carolyn Carpenter, Heather Mobley, Connie Philbeck, and Judge Christy Wilhelm. At the JCPC's May 17 meeting, the Council voted unanimously to recommend all four be reappointed to serve another term. An exception to the length of service provision of the Appointment Policy will be needed for Ms. Carpenter, Ms. Mobley, and Ms. Philbeck. An exception to the residency provision of the Appointment Policy will be needed for Ms. Mobley.

Additionally, the Council voted unanimously to accept the resignation of LaShay Avery, LME/MCO Regional Director. Ms. Avery plans to resign from Partners Behavioral Health and relocate to Texas.

REQUESTED ACTION:
Motion to reappoint Heather Mobley, Judge Christy Wilhelm, Carolyn Carpenter, and Connie Philbeck to the Juvenile Crime Prevention Council for two-year terms ending June 30, 2025; including an exception to the length of service provision of the Appointment Policy for Ms. Mobley, Ms. Carpenter, and Ms. Philbeck; and an exception to the residency provision of the Appointment Policy for Ms. Mobley.

Motion to remove LaShay Avery from the JCPC roster and thank her for her service.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Lauren Linker, Clerk to the Board

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Resignation Letter
- Roster
- Applications on File

May 9, 2023

Lashay Avery
Regional Director
Partners Health Management
901 S New Hope Rd.
Gastonia, NC 28054

To Juvenile Crime Prevention Council:

Please accept this letter of resignation from JCPC. It has been my pleasure to serve the council. My family and I are moving to Texas. My last day at Partners Health Management is June 2nd. My last meeting with the council will be our May meeting. Thank you for your partnership and collaboration. May you all continue serve our youth in the best manner possible.

Sincerely,

Lashay Avery

Lashay Avery
Regional Director
Community Operations

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**** Reappointment: 09/19/22 Term Ending: 09/30/24
(2)	Matthew Greer 41 Cabarrus Avenue W Concord, NC 28025	Police Chief (Designee)	Appointment: 10/18/21 Term Ending: 09/30/23
(3)	Travis Burke Sheriff's Department P.O. Box 707 Concord, NC 28026	Sheriff (or designee)	Appointment: 10/17/22 Term Ending: 09/30/24
(4)	Ashlie Shanley P.O. Box 70 Concord, NC 28026	District Attorney (or designee)	Appointment: 12/19/22 (unexpired term) Term Ending: 06/30/24
(5)	Emily Coltrane 160 Baker Road Archdale, NC 27263	Chief Court Counselor (Designee)	Appointment: 03/20/23^ (unexpired term) Term Ending: 09/30/24
(6)	LaShay Avery 5025 Lydney Circle Waxhaw, NC 28173	Area Mental Health Director (Designee)	Appointment: 11/15/21 (unexpired term) Reappointment: 09/19/22< Term Ending: 09/30/24
(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)	Jim Howden P. O. Box 707 Concord, NC 28026-0707	County Manager (or Designee)	Appointment: 12/21/20^ (unexpired term) 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 Reappointment: 06/20/22 Term Ending: 06/30/24

(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)	Chris Measmer P. O. Box 707 Concord, NC 28026	County Commissioner	Appointment: 12/19/22 Term Ending: 12/31/23
(12a)	Mikayla Branch 9650 Estridge Lane Concord, NC 28027	Youth < 21	Appointment: 10/17/22 Term Ending: 06/30/24
(12b)	Heather Jones 7455 Mt. Olive Road Concord, NC 28025	Member of the Public Representing the Interests of Families of At-Risk Youth	Appointment: 10/17/22 Term Ending: 06/30/24
(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 Christy Wilhelm County Courthouse P. O. Box 70 Concord, NC 28026-0070	Chief District Court Judge (Designee)	Appointment: 02/20/23 (unexpired term) 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)	Jacob Wentink P.O. Box 707 Concord, NC 28026	Active Living & Parks	Appointment: 09/19/22 Term Ending: 09/30/24

County Commissioner Appointees (At-large members)

(19a)	Ashley Fitch 6155 The Meadows Lane Harrisburg, NC 28075	Appointment: 10/17/22 Term Ending: 09/30/24
(19b)	Jamica La Franque 3852 French Fields Lane Harrisburg, NC 28075	Appointment: 0717/18 Reappointment: 07/21/20 Reappointment: 06/20/22 Term Ending: 06/30/24
(19c)	Adrian Attaway 401 Laureate Way Kannapolis, NC 28081	Appointment: 10/17/22^ (unexpired term) 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* Reappointment: 06/20/22* Term Ending: 06/30/24
(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 Church Road
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*<
Reappointment: 09/19/22*<
Term Ending: 09/30/24

(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 18, 2023

Carolyn Carpenter*	Current member	6526 Weldon Circle	Concord, NC 28027
Heather Mobley*^	Current member	145 Union Street S, Suite 108	Concord, NC 28025
Connie Philbeck*	Current member	1100 Braughton Avenue	Concord, NC 28025
Christy Wilhelm	Current member	P.O. Box 70	Concord, NC 28026

*An exception to the length of 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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments and Removals - Transportation Advisory Board

BRIEF SUMMARY:
Terms for the following Transportation Advisory Board members end June 30, 2023: Charles Hendrix, Amy Nance, and James Polk. Mr. Hendrix and Mr. Polk have agreed to serve another term as Citizen Advocate representatives. An exception to the length of service provision of the Appointment Policy will be needed for them. Mr. Polk also serves on the Home and Community Care Block Grant Committee. An exception to the service on multiple boards provision of the Appointment Policy will be needed for him.

Amy Nance is stepping down from the Advisory Board. Letecia Loadholt has agreed to serve as the Human Services DSS representative.

Additionally, EMS Deputy Chief Kara Clarke has agreed to serve as the Cabarrus EMS representative that has been vacant since Michelle Dietrich retired.

REQUESTED ACTION:
Motion to remove Amy Nance from the Transportation Advisory Board roster and thank her for her service.

Motion to appoint Letecia Loadholt to the Transportation Advisory Board for a three-year term as the Human Services DSS representative ending June 30, 2026.

Motion to appoint Kara Clarke to the Transportation Advisory Board as the Cabarrus EMS representative for a three-year term ending June 30, 2026

Motion to reappoint Charles Hendrix, Citizen Advocate/Retired, and James Polk Citizen Advocate/Aging, to the Transportation Advisory Board for three-year terms ending June 30, 2026; including an exception to the length of service provision of the Appointment Policy for Mr. Hendrix and Mr. Polk; and an exception to the service on multiple boards provision of the Appointment Policy for Mr. Polk.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Lauren Linker, Clerk to the Board

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

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**	**APPOINTMENT: 07/20/15**
100 B Willow Road	**Workshops**	**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**	**APPOINTMENT: 06/18/18**
99 Hillside Avenue SW	**Healthy Cabarrus**	**(unexpired term)**
Concord, NC 28025		**REAPPOINTMENT: 06/17/19**
(6/17/19 – Exception to Appt. Policy)		**REAPPOINTMENT: 07/18/22**
		TERM EXPIRING: 06/30/25

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		**REAPPOINTMENT: 06/20/22**
(Ex Officio Member)		**TERM EXPIRING: 06/30/25**
(8/19/13 – Exception to Appt. Policy)		
(6/20/16 – Exception to Appt. Policy)		
(6/17/19 – Exception to Appt. Policy)		
(6/20/22 – Exception to Appt. Policy)		

Vacant	**Cabarrus EMS**	**APPOINTMENT:**
Cabarrus EMS		
31 Willowbrook Drive		**TERM EXPIRING:**
Concord, NC 28027		

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		**REAPPOINTMENT: 06/20/22**
Concord, NC 28026		**TERM EXPIRING: 06/30/25**
(8/19/19 – Exception to Appt. Policy)		
(6/20/22 – 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 18, 2023

Kara Clarke		1503 Laforest Lane	Concord, NC 28027
Carson Cone		1208 Doncastle Court	Concord, NC 28027
Jennifer Cotton		10024 Fox Trotter Lane	Midland, NC 28107
Matthew Dober		2774 Berkhamstead Circle	Concord, NC 28027
Charles Hendrix*	Current member	185 Corban Avenue SE	Concord, NC 28025
Scott Holzworth		407 Whitewater Way NW	Concord, NC 28027
Letecia Loadholt		3238 Penny Earley Lane	Kannapolis, NC 28083
Roger Neal, Jr.		35 Larkview Drive SW	Concord, NC 28027
Scott Pauley		714 Ray Suggs Place NW	Concord, NC 20827
James Polk*^	Current member	224 Deal Street SE	Concord, NC 28025

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

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Appointments (Removals) - Youth Commission

BRIEF SUMMARY:
The following Youth Commission members have graduated from high school: Owen Lutz (Hickory Ridge), Vishista Chittalooru (Hickory Ridge), Kylie Greenelsh (Mt. Pleasant), Mary Liu (Northwest Cabarrus), and Kayla Anderson (At Large). It is requested to remove their names from the roster.

REQUESTED ACTION:
Motion to remove the following Youth Commission members from the roster and thank them for their service: Owen Lutz (Hickory Ridge), Vishista Chittalooru (Hickory Ridge), Kylie Greenelsh (Mt. Pleasant), Mary Liu (Northwest Cabarrus), and Kayla Anderson (At Large).

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Tracy LeCompte, Cooperative Extension Director

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Roster

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
Analicia Ival-Green	2024	A.L. Brown High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Owais Kamran	2024	Central Cabarrus High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Kimberly Lisk	2025	Central Cabarrus High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Adit Kamdar	2025	Concord High School	APPOINTMENT: TERM EXPIRING:	10-18-21 06-30-23
Ansh Kamdar	2026	Concord High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Connor Solvason	2024	Cox Mill High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Nihar Kummetha	2025	Cox Mill High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Owen Lutz	2023	Hickory Ridge High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Vishista Chittalooru	2023	Hickory Ridge High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
		Jay M. Robinson High School	APPOINTMENT: TERM EXPIRING:	
		Jay M. Robinson High School	APPOINTMENT: TERM EXPIRING:	
Ana McAuley	2025	Mt. Pleasant High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Kylie Greenelsh	2023	Mt. Pleasant High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24

Konner Black	2024	Northwest Cabarrus High School	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Mary Liu	2023	Northwest Cabarrus High School	APPOINTMENT: TERM EXPIRING:	01-17-23 06-30-24
		West Cabarrus High School	APPOINTMENT: TERM EXPIRING:	
		West Cabarrus High School	APPOINTMENT: TERM EXPIRING:	
Kayla Anderson	2023	At Large	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Nattellie Anderson	2024	At Large	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Scarlet West	2024	At Large	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24
Jaxon Boss	2026	At Large	APPOINTMENT: TERM EXPIRING:	10-17-22 06-30-24

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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
BOC - NACo Voting Credentials - 2023 Annual Conference

BRIEF SUMMARY:
The National Association of Counties, NACo, will hold their 2023 Annual Conference in Travis County, Texas on July 21 - 24, 2023. In order to participate in the Association's annual election of officers, a voting delegate must be registered by July 17, 2023 at 5 p.m.

REQUESTED ACTION:
Motion to designate Steve Morris as the voting delegate to represent Cabarrus County at the NACo Annual Conference in July.

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.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
BOC - Resolution Amending the Cabarrus County Board of Commissioners' 2023 Meeting Schedule

BRIEF SUMMARY:
The following resolution changes the date for the July work session from July 3, 2023 to July 10, 2023.

REQUESTED ACTION:
Motion to adopt the resolution.

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:

- Resolution

Resolution Amending the
Cabarrus County Board of Commissioners'
2023 Meeting Schedule

WHEREAS, on December 19, 2022, the Cabarrus County Board of Commissioners adopted a meeting schedule for calendar year 2023, which sets forth the dates, times and locations of various official county meetings; and

WHEREAS, the Board scheduled the July work session for July 3, 2023; and

WHEREAS, the Board is changing the date for the July work session to July 10, 2023.

NOW, THEREFORE BE IT RESOLVED that the Cabarrus County Board of Commissioners hereby amends its 2023 Meeting Schedule as follows:

1. The July work session will be held on Monday, July 10, 2023, at 4:00 p.m. in the Multipurpose Room at the Governmental Center in Concord, NC.

ADOPTED this 19th day of June, 2023.

_____
Stephen M. Morris, Chairman
Cabarrus County Board of Commissioners

ATTEST:

_____
Lauren Linker, Clerk to the Board

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
County Manager - Easement for Back Creek Greenway

BRIEF SUMMARY:
The proposed easement agreement will allow the Town of Harrisburg to hold an easement on Back Creek. The easement will cross the Hickory Ridge Middle and High School properties. The purpose is to construct a greenway and allow any access and necessary appurtenances to be constructed within the easement.

REQUESTED ACTION:
Motion to approve the easement agreement for Back Creek Greenway on Hickory Ridge Middle and High School.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Kelly Sifford, AICP
Assistant County Manager

BUDGET AMENDMENT REQUIRED:
No

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

ATTACHMENTS:

- Greenway Plans
- Easement Agreement
- Map Plan
- Aerial View

CAMELLIA GARDENS GREENWAY

3925 STALLINGS ROAD
TOWN OF HARRISBURG
NORTH CAROLINA, 28075

CONSTRUCTION DRAWINGS

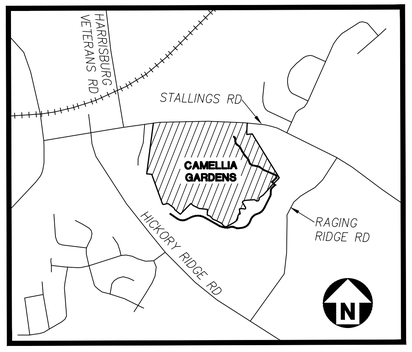
PROJECT NUMBER: SHH-18020
DATE: MARCH 24, 2022
RESUBMISSION: JUNE 10, 2022
RESUBMISSION: AUGUST 25, 2022

SHEET INDEX

C5.00	PLAN AND PROFILE - STA. 10+00 THRU STA. 19+50
C5.01	PLAN AND PROFILE - STA. 19+50 THRU STA. 27+00
C5.02	PLAN AND PROFILE - STA. 27+00 THRU 36+00
C5.03	PLAN AND PROFILE - STA. 36+00 THRU STA. 44+00
C5.04	PLAN AND PROFILE - STA. 44+00 THRU STA. 51+71.56
C8.00	GREENWAY DETAILS
C8.01	GREENWAY DETAILS

GENERAL NOTES:

1. THE PROPOSED GREENWAY WILL BE 4,172 LF UPON COMPLETION.
2. ANY ASPECT OF THE PLANS THAT DOES NOT MEET FEDERAL, STATE, AND LOCAL STANDARDS WILL REQUIRE ADJUSTMENT AND PLAN REVISION DURING THE CONSTRUCTION PHASE. APPROVAL OF THESE PLANS DOES NOT RELEASE DEVELOPER FROM ADHERENCE TO ALL APPLICABLE STANDARDS.
3. ALL PIPE SHALL BE CLASS IV RCP IN ACCORDANCE WITH NCDOT STD 300.01
4. ALL STRETCHES OF ALIGNMENT WITH 0% LONGITUDINAL SLOPE WILL MAINTAIN A 2% CROSS SLOPE.
2. 5. SUBMITTAL DRAWINGS FOR THE BOARDWALK SPANS MUST BE SUBMITTED PRIOR TO ANY CONSTRUCTION ON THE SPANS OCCURING.



VICINITY MAP
N.T.S.

McADAMS
The John R. McAdams Company, Inc.
3430 Toringdon Way
Suite 110
Charlotte, NC 28277
phone 704. 527. 0800
fax 919. 361. 2269
license number: C-0293, C-187
www.mcadamsco.com

CONTACT
STUART WOODARD
woodard@mcadamsco.com
PHONE: 704.527.0800

CLIENT
EMPIRE COMMUNITIES
8008 CORPORATE CENTER DRIVE SUITE 300
CHARLOTTE, NORTH CAROLINA 28226
PHONE: 704.602.3307

EMPIRE
PROJECT DIRECTORY

NORTH CAROLINA PROFESSIONAL SEAL 046788 ENGINEER STUART A. WOODARD
THE JOHN R. McADAMS COMPANY, INC. C-0293 CERTIFICATE OF AUTHORIZATION
08-25-2022

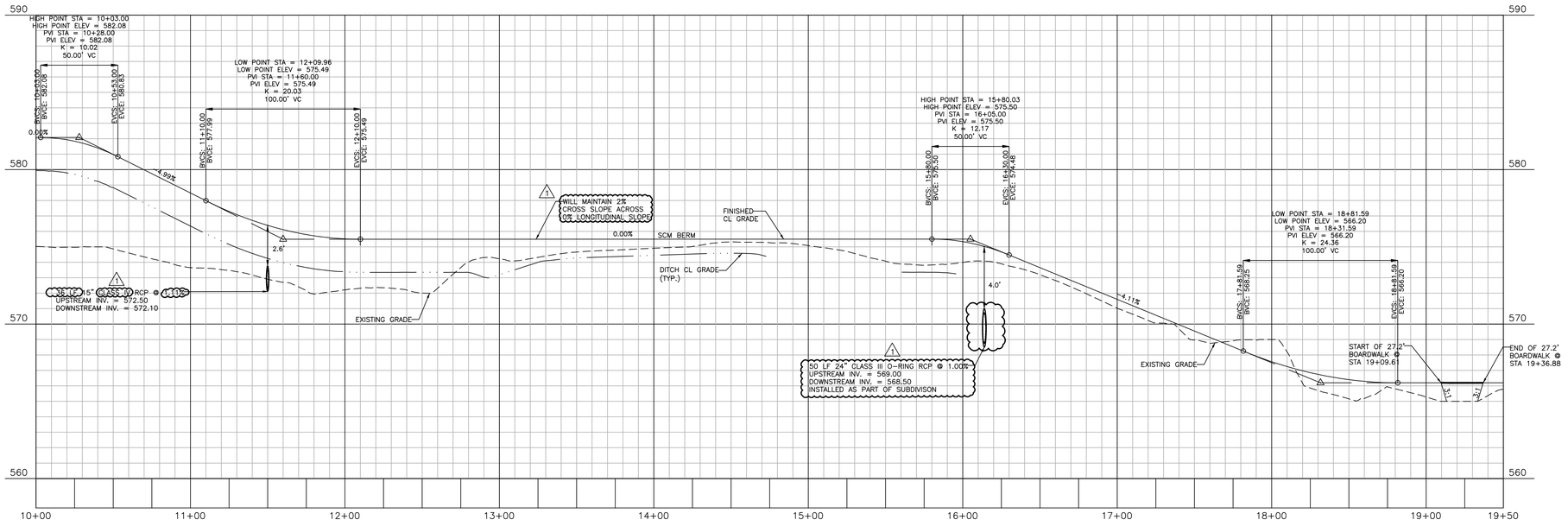
REVISIONS

NO.	DATE	
1	06. 10. 2022	REV PER TOWN COMMENTS
2	08. 25. 2022	REV PER TOWN COMMENTS

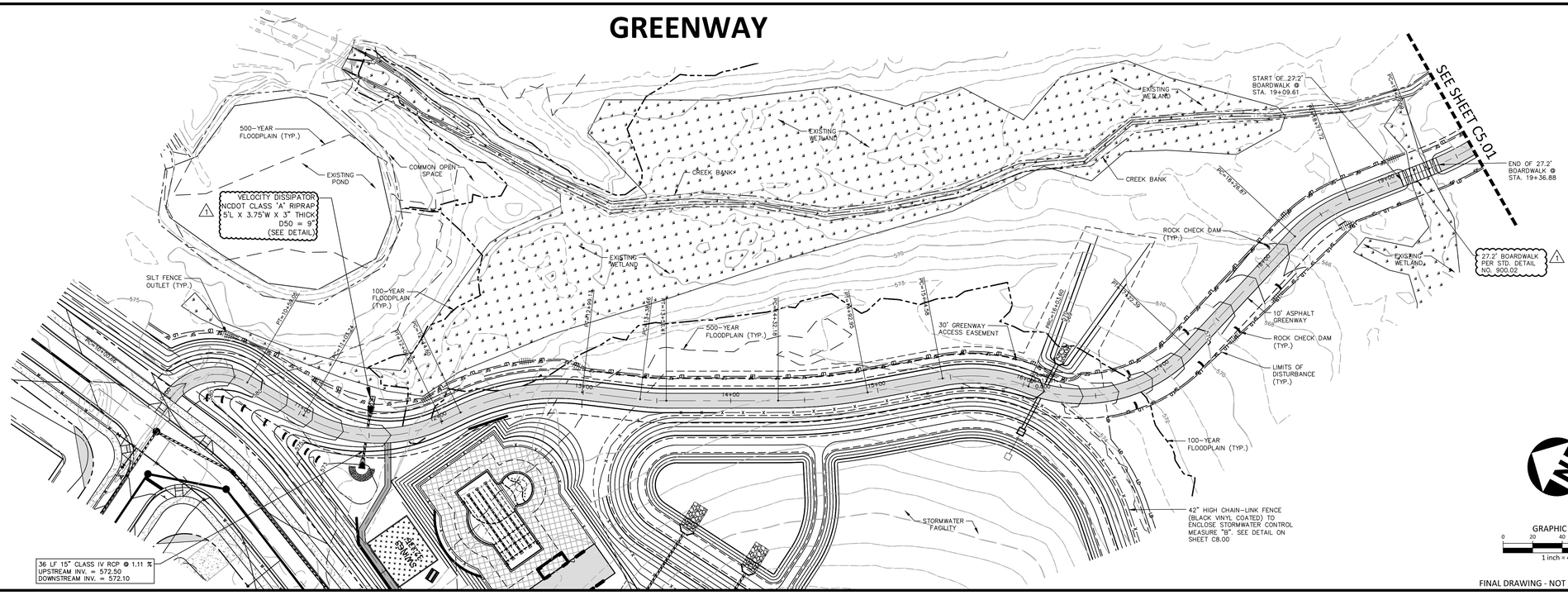
CONSTRUCTION DRAWINGS FOR:
CAMELLIA GARDENS GREENWAY
TOWN OF HARRISBURG
NORTH CAROLINA, 28075
PROJECT NUMBER: SHH-18020

FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

Y:\Projects\SHH\SHH-18020\Land\Construction Drawings\Current Drawings\SHH18020-CS1-GW .dwg, 8/25/2022 10:39:38 AM, Stuart Woodard



GREENWAY



GRADING LEGEND

- FLARED END SECTION
- STORM DRAINAGE
- 250 MAJOR CONTOUR
- 252 MINOR CONTOUR
- 250 EXISTING MAJOR CONTOUR
- 252 EXISTING MINOR CONTOUR
- EASEMENT LINE

EROSION CONTROL LEGEND

- SILT FENCE OUTLET
- FILTER BERM
- CHECK DAM
- SF SF SF SILT FENCE
- LD LD LIMITS OF DISTURBANCE

SITE LEGEND

- CENTERLINE
- STREAM CREEKLINE
- FLOODWAY
- 100-YEAR FLOODPLAIN
- 500-YEAR FLOODPLAIN
- CREEK BANK
- ASPHALT GREENWAY
- WETLAND AREA
- BOARDWALK/BRIDGE

GRAPHIC SCALE
0 20 40 80
1 inch = 40 ft.

FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

Y:\Projects\SHH\SHH-18020\Land\Construction Drawings\Current Drawings\SHH18020-P4-Greenway.dwg, 6/10/2022 9:56:01 AM, Brendan Kent

The John R. McAdams Company, Inc.
3430 Toringdon Way
Suite 110
Charlotte, NC 28277

phone 704. 527. 0800
fax 919. 361. 2269
license number: C-0293, C-187

www.mcadamsco.com

CLIENT
EMPIRE COMMUNITIES
8008 CORPORATE CENTER DRIVE SUITE 300
CHARLOTTE, NORTH CAROLINA 28226
PHONE: 704.602.3307

REVISIONS

NO.	DATE	
1	06. 10. 2022	REVISIONS PER TOWN 1ST REVIEW

NORTH CAROLINA — THE JOHN R. McADAMS COMPANY, INC. — C-0293 — CERTIFICATE OF AUTHORIZATION

NORTH CAROLINA PROFESSIONAL SEAL 046788 ENGINEER STUART A. WOODARD
06-10-2022

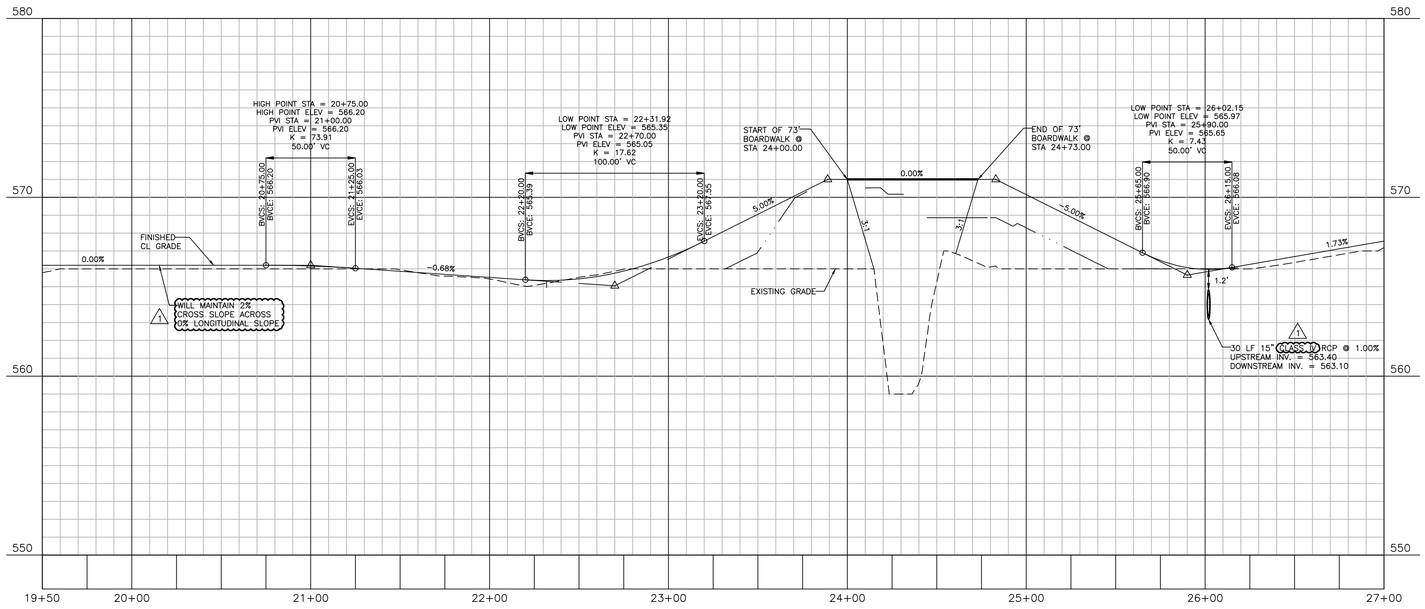
CAMELLIA GARDENS GREENWAY
CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
TOWN OF HARRISBURG, NORTH CAROLINA, 28075

PLAN INFORMATION

PROJECT NO.	SHH-18020
FILENAME	SHH18020-P4-Greenway
CHECKED BY	SAW
DRAWN BY	BPK
SCALE	1"=40'/1"=4'
DATE	03. 24. 2022

PLAN AND PROFILE
CAMELLIA GARDENS GREENWAY
STA. 10+00 THRU STA. 19+50

C5.00



GRADING LEGEND

- FLARED END SECTION
- STORM DRAINAGE
- 250 — MAJOR CONTOUR
- 252 — MINOR CONTOUR
- 250 — EXISTING MAJOR CONTOUR
- 252 — EXISTING MINOR CONTOUR
- EASEMENT LINE

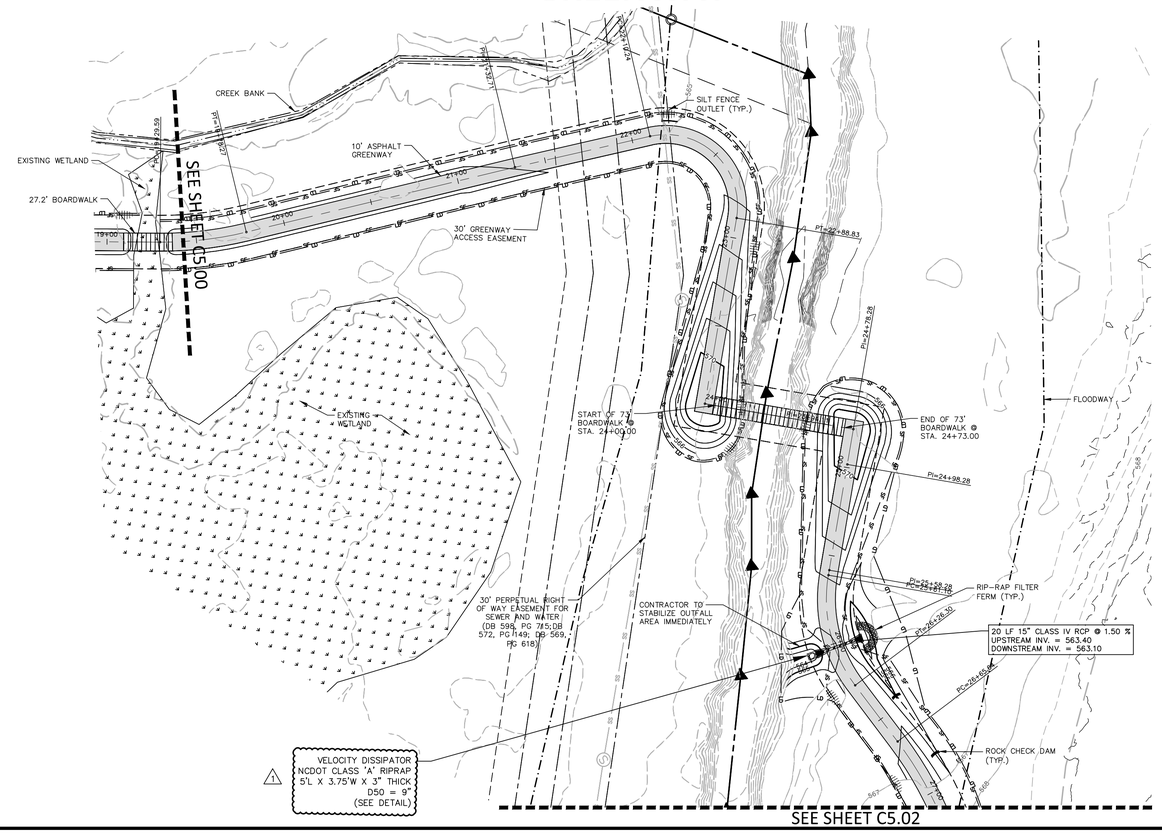
EROSION CONTROL LEGEND

- SILT FENCE OUTLET
- FILTER BERM
- CHECK DAM
- SF — SF — SF — SILT FENCE
- LD — LD — LIMITS OF DISTURBANCE

SITE LEGEND

- CENTERLINE
- STREAM CREEKLINE
- FLOODWAY
- 100-YEAR FLOODPLAIN
- 500-YEAR FLOODPLAIN
- CREEK BANK
- ASPHALT GREENWAY
- WETLAND AREA
- BOARDWALK/BRIDGE

GREENWAY



GRAPHIC SCALE
0 20 40 80
1 inch = 40 ft.

FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

McADAMS

The John R. McAdams Company, Inc.
3430 Toringdon Way
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phone 704. 527. 0800
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license number: C-0293, C-187

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EMPIRE COMMUNITIES
8008 CORPORATE CENTER DRIVE SUITE 300
CHARLOTTE, NORTH CAROLINA 28226
PHONE: 704.602.3307
EMPIRE

REVISIONS

NO.	DATE	
1	06. 10. 2022	REVISIONS PER TOWN 1ST REVIEW

NORTH CAROLINA — THE JOHN R. McADAMS COMPANY, INC. C-0293 — CERTIFICATE OF AUTHORIZATION

NORTH CAROLINA PROFESSIONAL SEAL 046788 ENGINEER STUART A. WOODARD
06-10-2022

CAMELLIA GARDENS GREENWAY
CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
TOWN OF HARRISBURG, NORTH CAROLINA, 28075

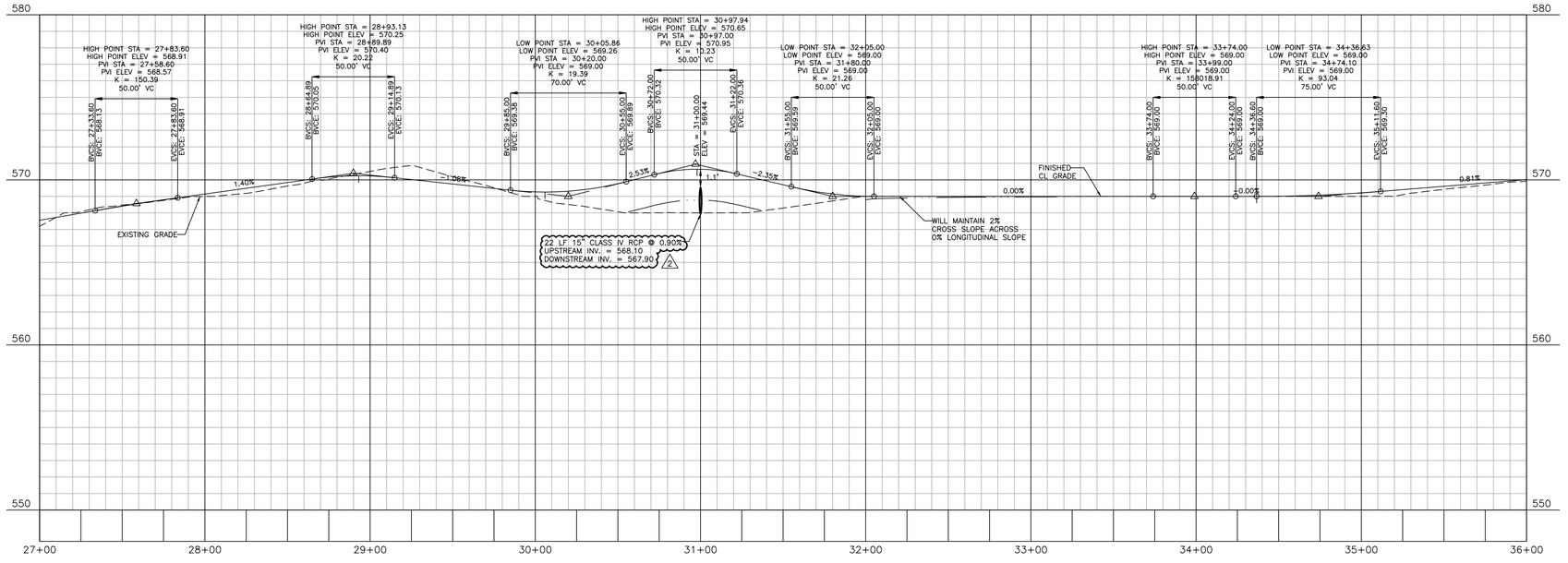
PLAN INFORMATION

PROJECT NO.	SHH-18020
FILENAME	SHH18020-P4-Greenway
CHECKED BY	SAW
DRAWN BY	BPK
SCALE	1"=40'/1"=4'
DATE	03. 24. 2022

PLAN AND PROFILE
CAMELLIA GARDENS GREENWAY
STA. 19+50 THRU STA. 27+00

C5.01

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GRADING LEGEND

- FLARED END SECTION
- STORM DRAINAGE
- 250 MAJOR CONTOUR
- 252 MINOR CONTOUR
- 250 EXISTING MAJOR CONTOUR
- 252 EXISTING MINOR CONTOUR
- EASEMENT LINE

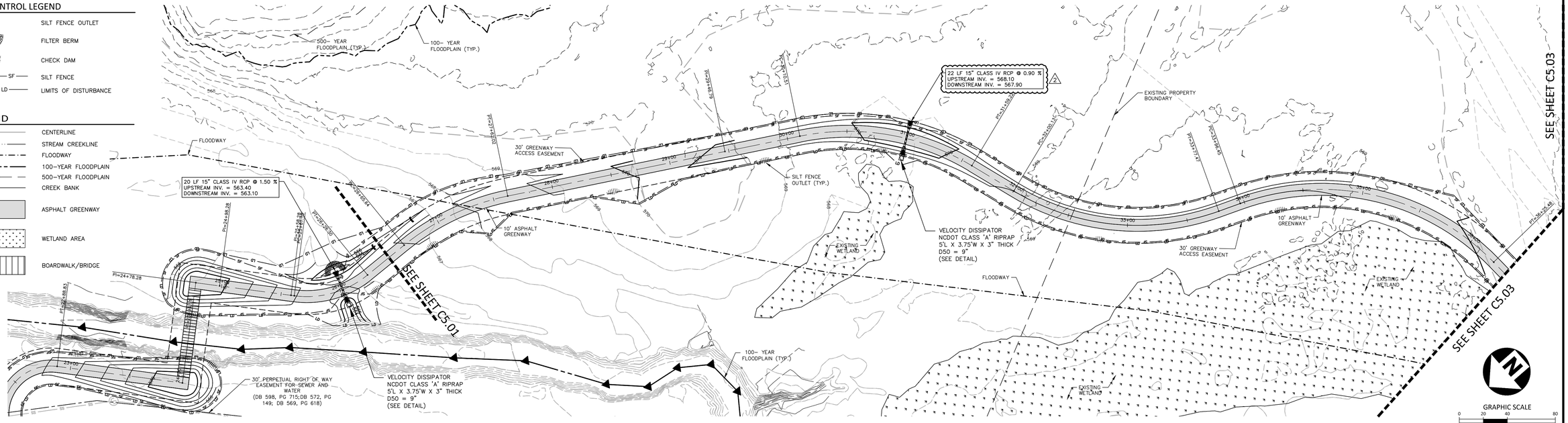
EROSION CONTROL LEGEND

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- ASPHALT GREENWAY
- WETLAND AREA
- BOARDWALK/BRIDGE

GREENWAY



FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

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PHONE: 704.602.3307

REVISIONS

NO.	DATE	
1	06. 10. 2022	REVISIONS PER TOWN 1ST REVIEW
2	08. 25. 2022	REVISIONS PER TOWN 2ND REVIEW

NORTH CAROLINA — THE JOHN R. McADAMS COMPANY, INC. — C-0293 — CERTIFICATE OF AUTHORIZATION

NORTH CAROLINA PROFESSIONAL SEAL 046788 ENGINEER STUART A. WOODARD
08-25-2022

CAMELLIA GARDENS GREENWAY

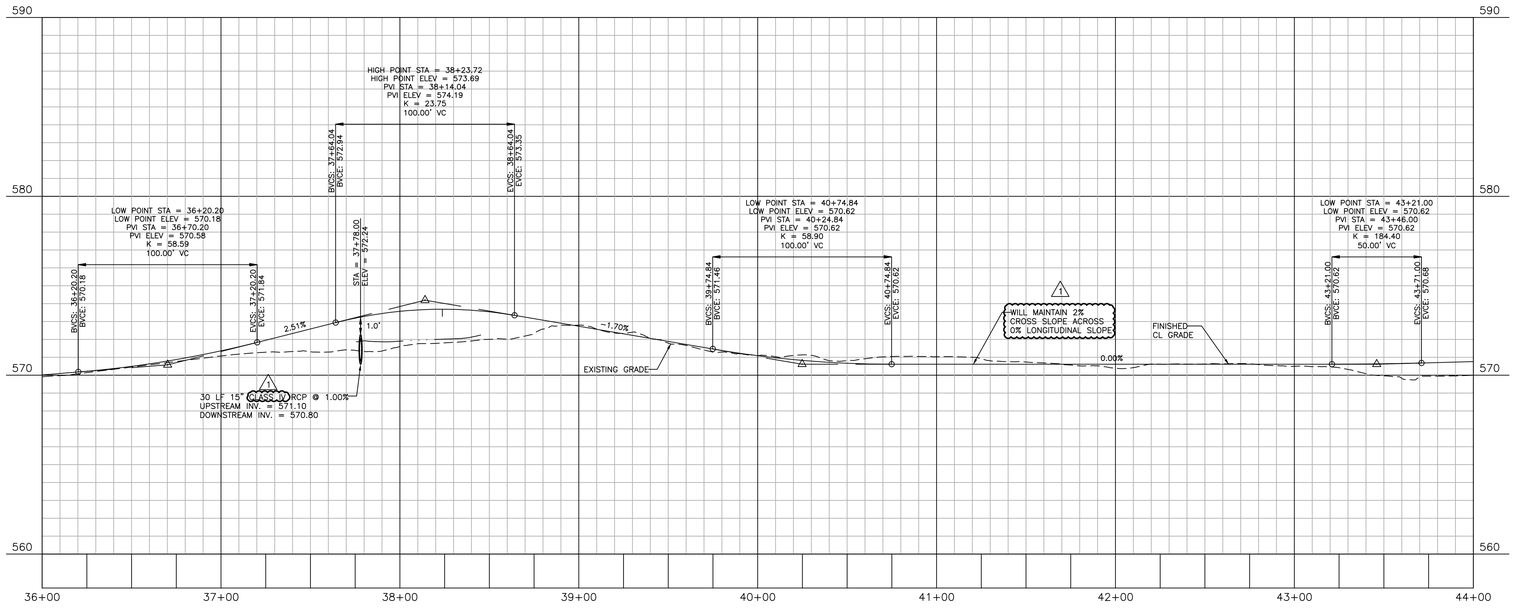
CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
TOWN OF HARRISBURG, NORTH CAROLINA, 28075

PLAN INFORMATION

PROJECT NO.	SHH-18020
FILENAME	SHH18020-P4-Greenway
CHECKED BY	SAW
DRAWN BY	BPK
SCALE	1"=40'/1"=4'
DATE	03. 24. 2022

PLAN AND PROFILE
CAMELLIA GARDENS GREENWAY
STA. 27+00 THRU STA. 36+00

C5.02



GREENWAY

GRADING LEGEND

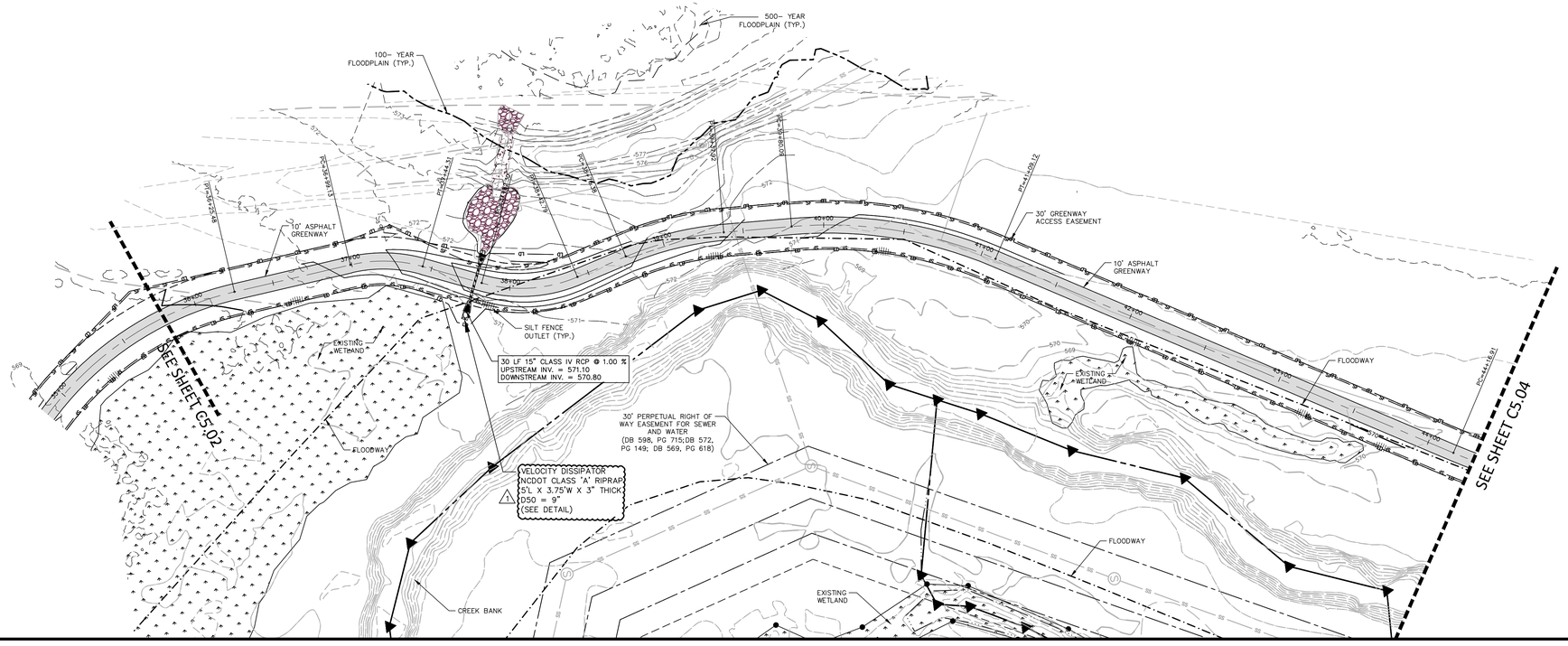
- FLARED END SECTION
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- 250 MAJOR CONTOUR
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- LD LD LIMITS OF DISTURBANCE

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- ASPHALT GREENWAY
- WETLAND AREA
- BOARDWALK/BRIDGE



GRAPHIC SCALE
0 20 40 80
1 inch = 40 ft.

FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

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REVISIONS

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1	06. 10. 2022	REVISIONS PER TOWN 1ST REVIEW

NORTH CAROLINA — THE JOHN R. McADAMS COMPANY, INC. — C-0293 — CERTIFICATE OF AUTHORIZATION

NORTH CAROLINA — PROFESSIONAL — SEAL 046788 — ENGINEER — STUART A. WOODARD — 06-10-2022

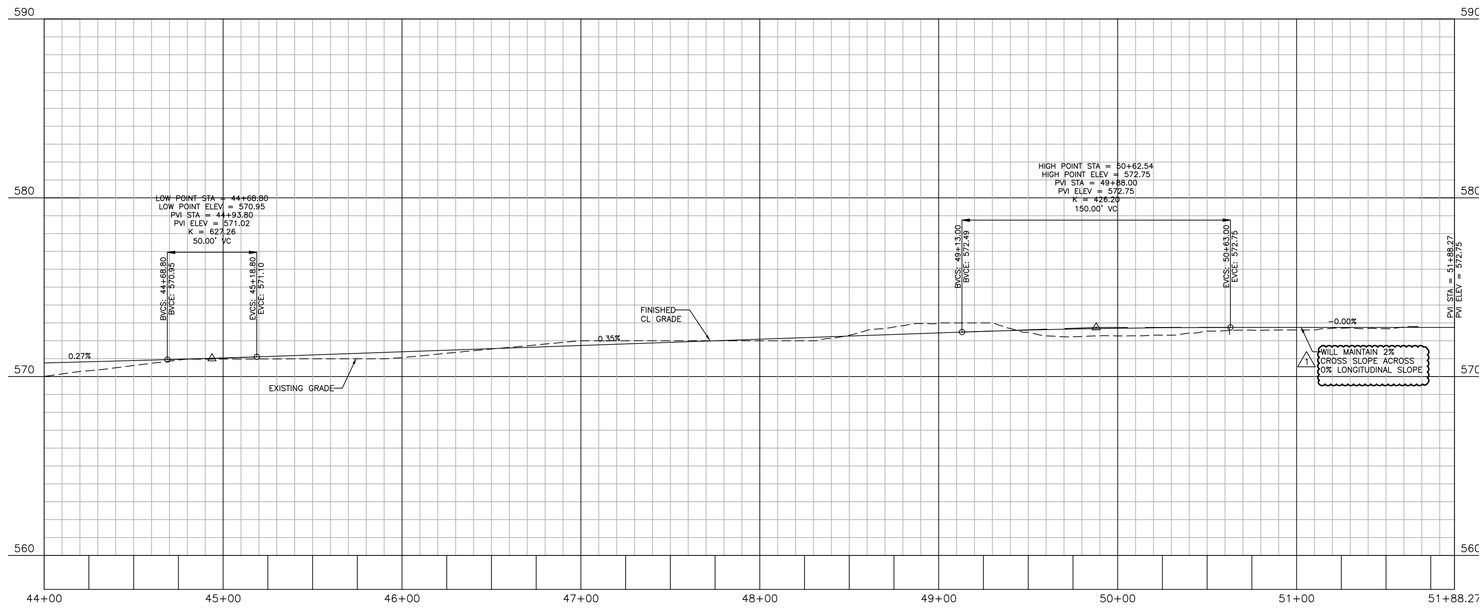
CAMELLIA GARDENS GREENWAY
CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
TOWN OF HARRISBURG, NORTH CAROLINA, 28075

PLAN INFORMATION

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PLAN AND PROFILE
CAMELLIA GARDENS GREENWAY
STA. 36+00 THRU STA. 44+00

C5.03



GREENWAY

GRADING LEGEND

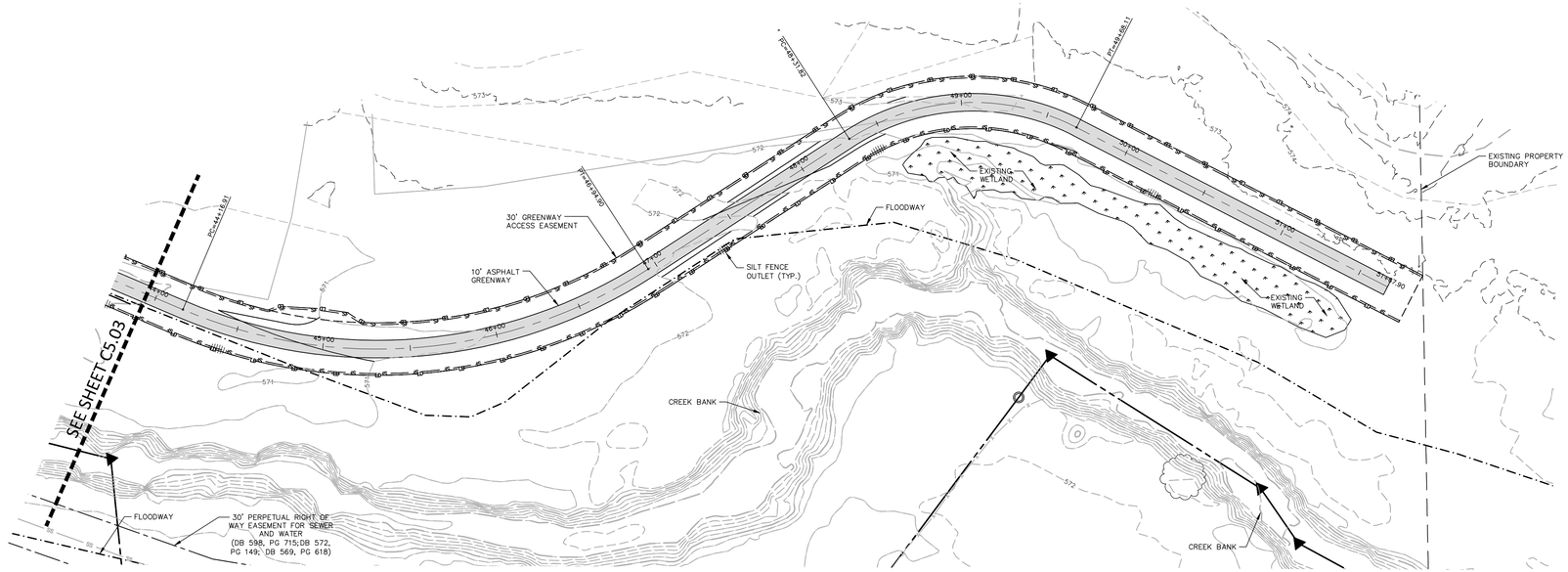
- FLARED END SECTION
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- BOARDWALK/BRIDGE



GRAPHIC SCALE
0 20 40 80
1 inch = 40 ft.

FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

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EMPIRE

REVISIONS

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NORTH CAROLINA CERTIFICATE OF AUTHORIZATION THE JOHN R. McADAMS COMPANY, INC. C-0293

NORTH CAROLINA PROFESSIONAL SEAL 046788 ENGINEER STUART A. WOODARD 06-10-2022

CAMELLIA GARDENS GREENWAY
CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
TOWN OF HARRISBURG, NORTH CAROLINA, 28075

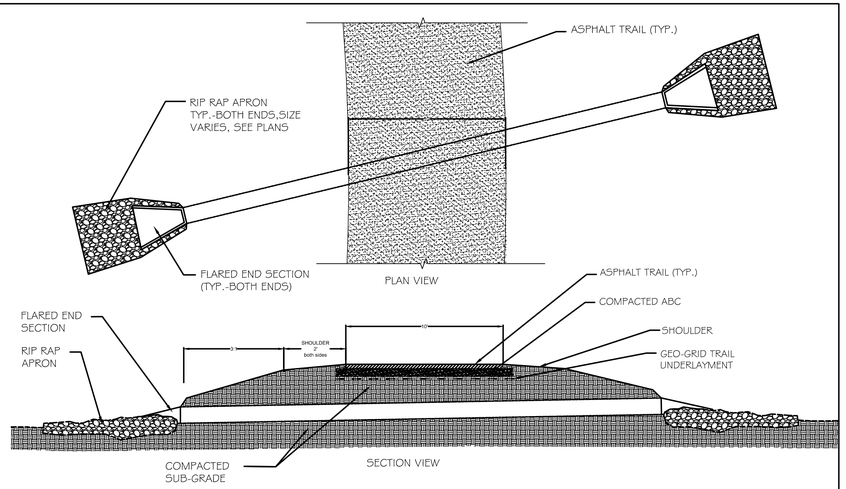
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PLAN AND PROFILE
CAMELLIA GARDENS GREENWAY
STA. 44+00 THRU STA. 51+71.56

C5.04

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X TRAIL CULVERT CROSSING

NTS

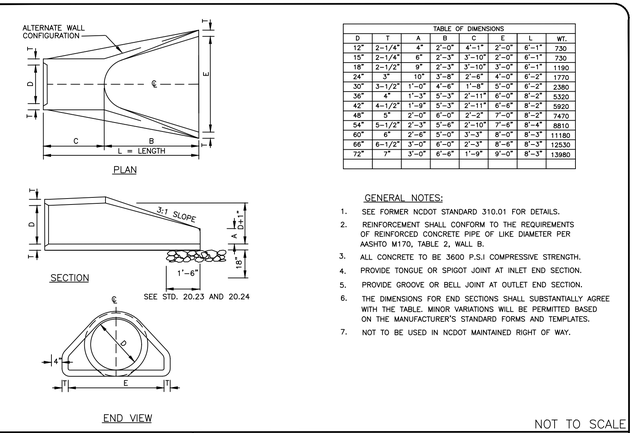


TABLE OF DIMENSIONS							
D	T	A	B	C	E	L	WT.
12"	2-1/4"	4"	2'-0"	4'-1"	2'-0"	6'-1"	730
15"	2-1/4"	6"	2'-3"	3'-10"	2'-0"	6'-1"	730
18"	2-1/2"	9"	2'-3"	3'-10"	3'-0"	6'-1"	1190
24"	3"	10"	3'-8"	2'-8"	4'-0"	6'-2"	1770
30"	3-1/2"	1'-0"	4'-6"	1'-8"	5'-0"	6'-2"	2380
36"	4"	1'-3"	5'-3"	2'-11"	6'-0"	8'-2"	5320
42"	4-1/2"	1'-6"	5'-3"	2'-11"	6'-8"	8'-2"	5920
48"	5"	2'-0"	6'-0"	2'-2"	7'-0"	8'-2"	7470
54"	5-1/2"	2'-3"	5'-6"	2'-10"	7'-6"	8'-4"	8810
60"	6"	2'-6"	5'-0"	3'-3"	8'-0"	8'-3"	11180
66"	6-1/2"	3'-0"	6'-0"	2'-3"	8'-6"	8'-3"	12530
72"	7"	3'-0"	6'-6"	1'-9"	9'-0"	8'-3"	13980

GENERAL NOTES:

1. SEE FORMER NCDOT STANDARD 310.01 FOR DETAILS.
2. REINFORCEMENT SHALL CONFORM TO THE REQUIREMENTS OF REINFORCED CONCRETE PIPE OF LIKE DIAMETER PER AASHTO M170, TABLE 2, WALL B.
3. ALL CONCRETE TO BE 3600 P.S.I COMPRESSIVE STRENGTH.
4. PROVIDE TONGUE OR SPIGOT JOINT AT INLET END SECTION.
5. PROVIDE GROOVE OR BELL JOINT AT OUTLET END SECTION.
6. THE DIMENSIONS FOR END SECTIONS SHALL SUBSTANTIALLY AGREE WITH THE TABLE. MINOR VARIATIONS WILL BE PERMITTED BASED ON THE MANUFACTURER'S STANDARD FORMS AND TEMPLATES.
7. NOT TO BE USED IN NCDOT MAINTAINED RIGHT OF WAY.

NOT TO SCALE

FLARED END SECTION
12" THRU 72" PIPE

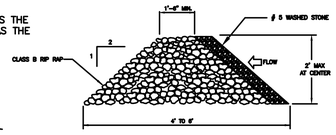
STD. NO. 20.22 | REV. 1

GENERAL NOTES:

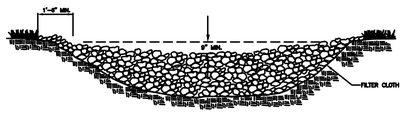
1. RIPRAP SIZE TO BE DESIGNED BY ENGINEER.
2. CHECK DAMS MAY BE USED IN SLOPING DITCHES OR CHANNELS TO SLOW VELOCITY OR TO CREATE SEDIMENT TRAPS.
3. ENSURE THAT MAXIMUM SPACING BETWEEN DAMS PLACES THE TOE OF THE UPSTREAM DAM AT THE SAME ELEVATION AS THE DOWNSTREAM DAM (SEE DIAGRAM BELOW).



A AND B ARE AT EQUAL ELEVATIONS



CROSS SECTION



PLAN

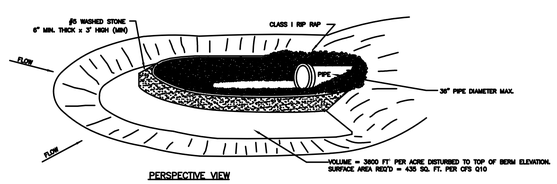
NOT TO SCALE

TEMPORARY ROCK CHECK DAM

STD. NO. 30.10A | REV. 15

DATA BLOCK

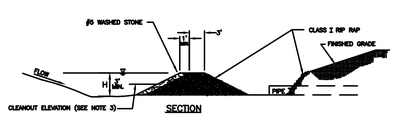
BASIN NO.	DRAINAGE AREA (ACRES)	DENUDED AREA (ACRES)	BASIN VOLUME REQUIRED (CUBIC FT.)	BASIN VOLUME PROVIDED (CUBIC FT.)	BASIN SURFACE AREA REQUIRED (SQ FT.)	BASIN SURFACE AREA PROVIDED (SQ FT.)	CLEANOUT DEPTH (FT.) H/2	H (FEET)



PERSPECTIVE VIEW

GENERAL NOTES:

1. GRAVEL AND RIP RAP FILTER BERM BASIN SHOULD BE USED TO PROTECT EXISTING PIPE INVERTS THAT DRAIN 5 ACRES OR LESS.
2. DIMENSIONS SHOWN ARE THE MINIMUM ACCEPTED UNLESS OTHERWISE NOTED.
3. CLEANOUT PRIOR TO SEDIMENT REACHING HALF OF BERM HEIGHT.
4. MAY BE USED AT PIPES WITH MAX. DIAMETER OF 36".

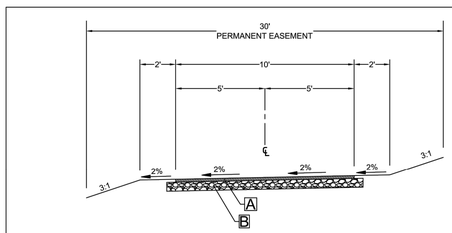


SECTION

NOT TO SCALE

GRAVEL AND RIP RAP FILTER BERM BASIN

STD. NO. 30.12 | REV. 15



DIMENSIONS FOR GREENWAY

TYPICAL CROSS SECTION AND MINIMUM PAVEMENT SECTION

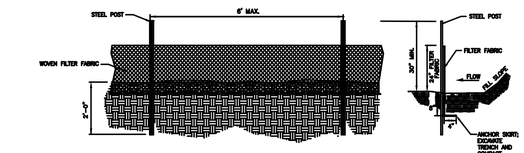
A. 1.5" BITUMINOUS CONCRETE SURFACE COURSE, TYPE S9.5B
B. 8" AGGREGATE BASE COURSE COMPACTED TO 100% STANDARD PROCTOR

NOTES:

1. GREENWAY TRAILS SHALL MEET ADA STANDARDS. LONGITUDINAL SLOPES UP TO 8% WITH LANDINGS ARE ACCEPTABLE FOR SHORT DISTANCES WHERE 5% GRADES ARE NOT POSSIBLE.
2. SUBGRADE SHALL BE PROOF-ROLLED AND APPROVED BY THE TOWN CONSTRUCTION INSPECTOR PRIOR TO PAVING.
3. THE EDGES OF THE TRAIL SHALL BE A MINIMUM DISTANCE OF 5 FEET FROM TREES, RAISED MANHOLES, AND OTHER RAISED UTILITIES.
4. THE MINIMUM CENTERLINE RADIUS SHALL BE 50 FEET.
5. TREE LIMBS SHALL BE TRIMMED UP TO 10 FEET ABOVE THE FINISHED TRAIL GRADE AND WITHIN 10 FEET HORIZONTALLY FROM THE TRAIL EDGES. DANGEROUS TREE LIMBS OVER THE TRAIL AND DEAD TREES NEAR THE TRAIL SHALL BE REMOVED AS DETERMINED BY THE TOWN.

PROJECT MANAGER:	MAH	TYPICAL GREENWAY SECTION
DRAWN BY:	PMK	
DATE:	11/17/2021	DRAWING NUMBER: 14 OF 14

Harrisburgnc
The right side of opportunity



GENERAL NOTES:

1. WOVEN FILTER FABRIC BE USED WHERE SILT FENCE IS TO REMAIN FOR A PERIOD OF MORE THAN 30 DAYS.
2. STEEL POSTS SHALL BE 5'-0" IN HEIGHT AND BE OF THE SELF-FASTENER ANGLE STEEL TYPE.
3. TURN SILT FENCE UP SLOPE AT ENDS.
4. ORANGE SAFETY FENCE IS REQUIRED AT BACK OF SILT FENCE WHEN GRADING IS ADJACENT TO SWIM BUFFERS, STREAMS OR WETLANDS (REFER TO SWIM BUFFER GUIDELINES). THE COLOR ORANGE IS RESERVED FOR VISUAL IDENTIFICATION OF ENVIRONMENTALLY SENSITIVE AREAS.
5. DRAINAGE AREA CAN NOT BE GREATER THAN 1/4 ACRE PER 100 FT OF FENCE.
6. SLOPE LENGTHS CAN NOT EXCEED CRITERIA SHOWN IN TABLE 6.62A NORTH CAROLINA EROSION AND SEDIMENT CONTROL PLANNING AND DESIGN MANUAL.
7. DO NOT INSTALL SEDIMENT FENCE ACROSS STREAMS, DITCHES, WATERWAYS OR OTHER AREAS OF CONCENTRATED FLOW.

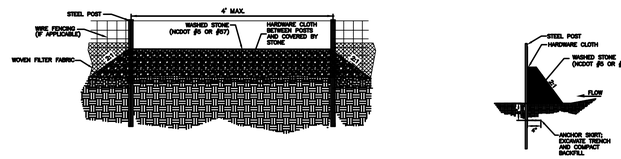
MAINTENANCE NOTES:

1. FILTER BARRIERS SHALL BE INSPECTED BY THE FINANCIALLY RESPONSIBLE PARTY OR HIS AGENT IMMEDIATELY AFTER EACH RAINFALL AND AT LEAST DAILY DURING PROLONGED RAINFALL. ANY REPAIRS NEEDED SHALL BE MADE IMMEDIATELY.
2. SHOULD THE FABRIC DECOMPOSE OR BECOME INEFFECTIVE PRIOR TO THE END OF THE EXPECTED USABLE LIFE AND THE BARRIER STILL IS NECESSARY, THE FABRIC SHALL BE REPLACED PROMPTLY.
3. SEDIMENT DEPOSITS SHOULD BE REMOVED WHEN DEPOSITS REACH APPROX. HALF THE HEIGHT OF THE BARRIER. ANY SEDIMENT DEPOSITS REMAINING IN PLACE AFTER THE SILT FENCE IS REMOVED SHALL BE DRESSED TO CONFORM TO THE EXISTING GRADE, PREPARED AND SEEDED.

NOT TO SCALE

TEMPORARY SILT FENCE

STD. NO. 30.06A | REV. 15



GENERAL NOTES:

1. SEDIMENT FILTER OUTLET AND HARDWARE CLOTH SHALL BE 16 INCHES HIGH BUT NO TALLER THAN 18 INCHES.
2. HARDWARE CLOTH SHALL BE ANCHORED TO THE STEEL POSTS SECURELY USING APPROPRIATE ANCHORS. HARDWARE CLOTH SHALL BE KEYED IN A MINIMUM OF 12 INCHES IN LENGTH AND BACKFILLED PROPERLY AS SHOWN IN ABOVE DETAIL. HARDWARE CLOTH TO BE SAME AS STD. #30.09 (19 GAUGE, 1/4" SPACING).
3. POSTS SHALL BE NO MORE THAN 4 FEET APART.
4. SITE OUTLETS AT ANY POINT SHALL CONCENTRATED FLOWS ARE ANTICIPATED AND AT THE DIRECTION OF THE INSPECTOR.

MAINTENANCE NOTES:

1. FILTER OUTLETS SHALL BE INSPECTED BY THE FINANCIALLY RESPONSIBLE PARTY OR HIS AGENT IMMEDIATELY AFTER EACH RAINFALL AND AT LEAST DAILY DURING PROLONGED RAINFALL. ANY REPAIRS NEEDED SHALL BE MADE IMMEDIATELY.
2. THE STONE SHALL BE REPLACED PROMPTLY AFTER ANY EVENT THAT HAS CLOGGED OR REMOVED IT.
3. SEDIMENT DEPOSITS SHOULD BE REMOVED WHEN DEPOSITS REACH HALF THE HEIGHT OF THE BARRIER. ANY SEDIMENT DEPOSITS REMAINING IN PLACE AFTER THE SILT FENCE OUTLET IS REMOVED SHALL BE DRESSED TO CONFORM TO THE EXISTING GRADE, PREPARED AND SEEDED.

NOT TO SCALE

SILT FENCE OUTLET

STD. NO. 30.06C | REV. 15

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EMPIRE

CAMELLIA GARDENS GREENWAY

CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
HARRISBURG, NORTH CAROLINA, 28075

NORTH CAROLINA CERTIFICATE OF AUTHORIZATION THE JOHN R. McADAMS COMPANY, INC. C-0293

NORTH CAROLINA PROFESSIONAL SEAL 046788 ENGINEER STUART A. WOODARD

06-10-2022

REVISIONS

NO.	DATE	
1	06. 10. 2022	REV PER TOWN COMMENTS

PLAN INFORMATION

PROJECT NO.	SHH-18020
FILENAME	SHH18020-D1-Greenway
CHECKED BY	SAW
DRAWN BY	BPK
SCALE	N/A
DATE	03.24.2022

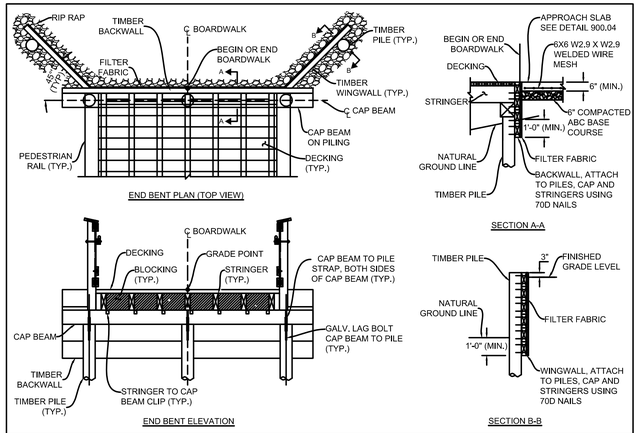
SHEET

GREENWAY DETAILS

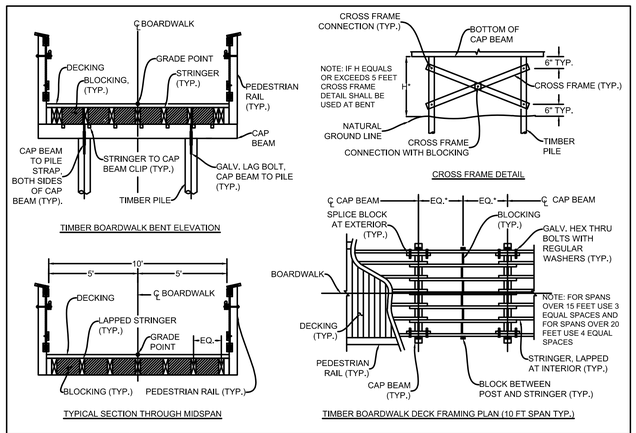
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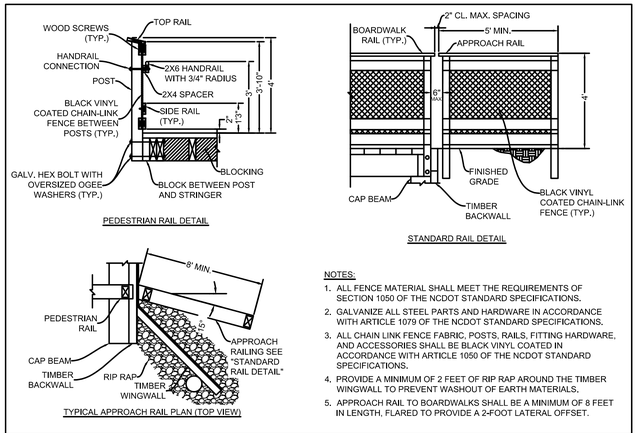
Y:\Projects\SHH\SHH-18020\Land\Construction Drawing\Current Drawing\SHH18020-D1-Greenway.dwg, 6/10/2022 9:22:02 AM, Brendan Kent



BOARDWALK — STD. NO. 900.02 — SHEET 1 OF 3



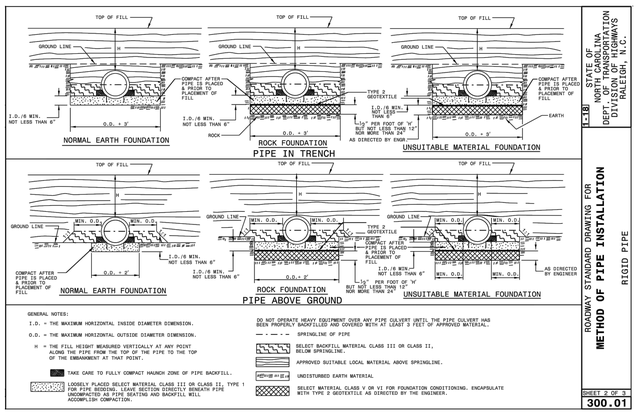
BOARDWALK — STD. NO. 900.02 — SHEET 2 OF 3



NOTES:

1. ALL FENCE MATERIAL SHALL MEET THE REQUIREMENTS OF SECTION 1050 OF THE NCDOT STANDARD SPECIFICATIONS.
2. GALVANIZE ALL STEEL PARTS AND HARDWARE IN ACCORDANCE WITH ARTICLE 1079 OF THE NCDOT STANDARD SPECIFICATIONS.
3. ALL CHAIN LINK FENCE FABRIC, POSTS, RAILS, FITTING HARDWARE, AND ACCESSORIES SHALL BE BLACK VINYL COATED IN ACCORDANCE WITH ARTICLE 1050 OF THE NCDOT STANDARD SPECIFICATIONS.
4. PROVIDE A MINIMUM OF 2 FEET OF RIP RAP AROUND THE TIMBER WINGWALL TO PREVENT WASHOUT OF EARTH MATERIALS.
5. APPROACH RAIL TO BOARDWALKS SHALL BE A MINIMUM OF 8 FEET IN LENGTH, FLARED TO PROVIDE A 2-FOOT LATERAL OFFSET.

BOARDWALK — STD. NO. 900.02 — SHEET 3 OF 3



GENERAL NOTES:

I.D. = THE MAXIMUM HORIZONTAL INSIDE DIAMETER DIMENSION.

O.D. = THE MAXIMUM HORIZONTAL OUTSIDE DIAMETER DIMENSION.

H = THE FILL HEIGHT MEASURED VERTICALLY AT ANY POINT ALONG THE PIPE FROM THE TOP OF THE PIPE TO THE TOP OF THE EMBANKMENT AT THAT POINT.

TAKE CARE TO FULLY COMPACT HAUNCH ZONE OF PIPE BACKFILL.

LOOSELY PLACED SELECT MATERIAL CLASS III OR CLASS II; TYPE 1 FOR PIPE BEDDING. LEAVE SECTION DIRECTLY BENEATH PIPE UNCOMPACTED AS PIPE SEATING AND BACKFILL WILL ACCOMPLISH COMPACTION.

DO NOT OPERATE HEAVY EQUIPMENT OVER ANY PIPE CULVERT UNTIL THE PIPE CULVERT HAS BEEN PROPERLY BACKFILLED AND COVERED WITH AT LEAST 3 FEET OF APPROVED MATERIAL.

SPRINGLINE OF PIPE

SELECT BACKFILL MATERIAL CLASS III OR CLASS II, BELOW SPRINGLINE.

APPROVED SUITABLE LOCAL MATERIAL ABOVE SPRINGLINE.

UNDISTURBED EARTH MATERIAL

SELECT MATERIAL CLASS V OR VI FOR FOUNDATION CONDITIONING. ENCAPSULATE WITH TYPE 2 GEOTEXTILE AS DIRECTED BY THE ENGINEER.

STATE OF NORTH CAROLINA DEPARTMENT OF TRANSPORTATION DIVISION OF HIGHWAYS RALEIGH, N.C.

C-18

ROADWAY STANDARD DRAWING FOR

METHOD OF PIPE INSTALLATION

RIGID PIPE

SHEET 3 OF 3 — 300.01

FLEXIBLE PIPE

Round Corrugated Steel Pipe
2 2/3 x ½ corrugation **

Diameter (Inches)	Minimum cover (Inches)	Maximum Height of Cover (feet) (Ga)	16	14	12	10	8
12	12		204	256			
15	12		162	204			
18	12		135	169	239		
21	12		115	145	204		
24	12		100	126	178		
30	12		79	100	142		
36	12		65	83	117	152	
42	12		55	70	100	130	160
48	12		48	61	87	113	139
54	12			54	77	100	123
60	12				69	90	111
66	12					81	100
72	12					74	91
78	12						81
84	12						69

Round Corrugated Aluminum Pipe
2 2/3 x ½ corrugation **

Diameter (Inches)	Minimum cover (Inches)	Maximum Height of Cover (feet) (Ga)	16	14	12	10	8
12	12		123	155	218	281	344
15	12		98	123	174	224	275
18	12		81	102	144	187	228
21	12		69	87	123	160	195
24	12		60	76	108	139	171
27	12			67	95	123	151
30	12			60	85	111	136
36	12			50	71	92	113
42	12				60	78	96
48	12				52	68	84
54	12				46	50	74
60	12					50	62
66	12						51
72	12						41

** FOR DIFFERENT CORRUGATIONS AND ARCH PIPES REFER TO ROADWAY DESIGN MANUAL OR MANUFACTURERS SPECIFICATION.

HDPE - * (Minimum fill) 2' for pipe diameters ≥ 12" and ≤ 60"
* (Maximum fill) 20' for pipe diameters ≥ 24"
17' for pipe diameters ≥ 30" and ≤ 60"

PVC - * (Maximum fill) 2' for pipe diameters ≥ 12" and ≤ 36"
* (Maximum fill) 30' for pipe diameters ≥ 12" and ≤ 36"

* FILL HEIGHT IS MEASURED FROM THE TOP OF THE PIPE TO THE BOTTOM OF THE PAVEMENT STRUCTURE

REFER TO THE FOLLOWING FOR PIPE SPECIFICATIONS

CSP - AASHTO M36
CAAP - AASHTO M196
HDPE - AASHTO M294
PVC - ASTM F949 or AASHTO M304

NOTES: FILL HEIGHTS SHOWN WERE CALCULATED USING AASHTO LRFD BRIDGE DESIGN SPECIFICATIONS

1' MINIMUM COVER FOR ALL SIDE DRAIN PIPE IN ACCORDANCE WITH THE STANDARD SPECIFICATIONS

RIGID PIPE

RCP - * (Minimum fill) 1' for Class IV & CLASS V
2' for Class III & Class II

* (Maximum fill) 10' - Class II pipe
20' - Class III pipe
30' - Class IV pipe
40' - Class V pipe

(For fills > 40' & < 80' use LRFD Direct Design Method)

* FILL HEIGHT IS MEASURED FROM THE TOP OF THE PIPE TO THE BOTTOM OF THE PAVEMENT STRUCTURE

REFER TO THE FOLLOWING FOR PIPE SPECIFICATIONS

RCP - AASHTO M170

NOTES: FILL HEIGHTS SHOWN WERE CALCULATED USING AASHTO LRFD BRIDGE DESIGN SPECIFICATIONS

1' MINIMUM COVER FOR ALL SIDE DRAIN PIPE IN ACCORDANCE WITH THE STANDARD SPECIFICATIONS

STATE OF NORTH CAROLINA DEPARTMENT OF TRANSPORTATION DIVISION OF HIGHWAYS RALEIGH, N.C.

C-18

ROADWAY STANDARD DRAWING FOR

METHOD OF PIPE INSTALLATION

FILL HEIGHT TABLES

SHEET 2 OF 3 — 300.01

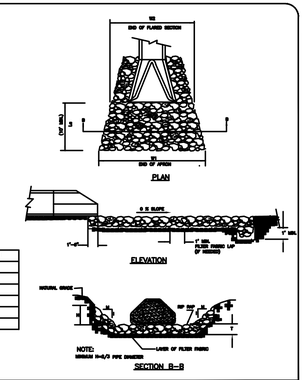
NOTES:

1. CLASS OR MEDIAN SIZE OF RIPRAP AND LENGTH, WIDTH AND DEPTH OF APRON TO BE DESIGNED BY THE ENGINEER.
2. REFER TO THE CHARLOTTE MECKLENBURG STORM WATER DESIGN MANUAL FOR RIPRAP APRON DESIGN STANDARDS.
3. RIPRAP SHOULD EXTEND UP BOTH SIDES OF THE APRON AND AROUND THE END OF THE PIPE OR CULVERT AT THE DISCHARGE OUTLET AT A MAXIMUM SLOPE OF 2:1 AND A HEIGHT NOT LESS THAN TWO THIRDS THE PIPE DIAMETER OR CULVERT HEIGHT.
4. THERE SHALL BE NO OVERFLOW FROM THE END OF THE APRON TO THE SURFACE OF THE RECEIVING CHANNEL. THE AREA TO BE PAVED OR RIPRAPPED SHALL BE UNDERCUT SO THAT THE INVERT OF THE APRON SHALL BE AT THE SAME GRADE AS THAT WITH THE SURFACE OF THE RECEIVING CHANNEL. THE APRON SHALL HAVE A CUTOFF OR TOE WALL AT THE DOWNSTREAM END.
5. THE WIDTH OF THE END OF THE APRON SHALL BE EQUAL TO THE BOTTOM WIDTH OF THE RECEIVING CHANNEL. MINIMUM TAPER TO RECEIVING CHANNEL 5:1
6. ALL SUBGRADE FOR STRUCTURE TO BE COMPACTED TO 98% OR GREATER.
7. THE PLACING OF FILL EITHER LOOSE OR COMPACTED IN THE RECEIVING CHANNEL SHALL NOT BE ALLOWED.
8. NO BENDS OR CURVES IN THE HORIZONTAL ALIGNMENT OF THE APRON WILL BE PERMITTED.
9. FILTER FABRIC SHALL BE INSTALLED ON COMPACTED SUBGRADE PRIOR TO PLACEMENT OF RIP RAP.
10. ANY DISTURBED AREA FROM END OF APRON TO RECEIVING CHANNEL MUST BE STABILIZED.

USE USDA HYDROGRAPH FROM NC SEDIMENT AND EROSION CONTROL MANUAL OR CHARLOTTE MECKLENBURG STORM WATER DESIGN MANUAL FOR DESIGN DATA.

OUTLET	La	W1	W2	*T	H

* d50 (use fig 8.06 ddh "NC SEDIMENT AND EROSION CONTROL MANUAL"
dmax = 1.5 x d50
T = 1.5 X dmax.



RIPRAP APRON AT PIPE OUTFALLS — STD. NO. 20.23 — REV. 7

McAdams
The John R. McAdams Company, Inc.
3430 Toringdon Way
Suite 110
Charlotte, NC 28277
phone 704. 527. 0800
fax 919. 361. 2269
license number: C-0293, C-187
www.mcadamsco.com

CLIENT

EMPIRE COMMUNITIES
8008 CORPORATE CENTER DRIVE SUITE 300
CHARLOTTE, NORTH CAROLINA 28226
PHONE: 704.602.3307

EMPIRE

CAMELLIA GARDENS GREENWAY

CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
HARRISBURG, NORTH CAROLINA, 28075

NORTH CAROLINA PROFESSIONAL ENGINEER SEAL 046788 STUART A. WOODARD — CERTIFICATION OF AUTHORIZATION — THE JOHN R. McADAMS COMPANY, INC. C-0293

06-15-2022

REVISIONS

NO.	DATE	
1	06. 10. 2022	REV PER TOWN COMMENTS

PLAN INFORMATION

PROJECT NO.	SHH-18020
FILENAME	SHH18020-D1-Greenway
CHECKED BY	SAW
DRAWN BY	BPK
SCALE	N/A
DATE	03.24.2022

SHEET

GREENWAY DETAILS

C8.01

FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

Y:\Projects\SHH\SHH-18020\Land\Construction Drawings\Current Drawings\SHH18020-D1-Greenway.dwg, 6/10/2022 9:22:10 AM, Brendan Kent

Drawn by: Richard M. Koch
Mail to: Town of Harrisburg
Post Office Box 100
Harrisburg, NC 28075

STATE OF NORTH CAROLINA

BACK CREEK
GREENWAY EASEMENT

COUNTY OF CABARRUS

This RIGHT OF WAY and GREENWAY EASEMENT is made and entered into this _____ day of _____, 2023, by and between CABARRUS COUNTY BOARD OF EDUCATION and CABARRUS COUNTY (collectively "GRANTOR"), and the TOWN OF HARRISBURG, North Carolina, a North Carolina municipal corporation (the "TOWN").

FOR AND IN CONSIDERATION of One Dollar ($1.00) and other good and valuable consideration in hand paid by TOWN to GRANTOR, the receipt of which is hereby acknowledged, GRANTOR does hereby give, grant and convey to TOWN, its successors and assigns, a perpetual Easement for a greenway, 30 feet in width, across the GRANTOR'S property, known as Hickory Ridge Middle School and High School, as contained in PINs 5507828255, 5517015236, 5517213800 and 5517228820, and as shown in the description of BACK CREEK GREENWAY for the TOWN prepared by The John R. McAdams Company, which document is attached as Exhibit A and incorporated by reference. This easement permits the TOWN to go in and upon such real property of GRANTOR for the purposes described below.

GRANTOR further grants and conveys to TOWN the right to construct, maintain and operate in, upon and through such premises a greenway, including all necessary appurtenances, together with the right at all times of ingress, egress and regress, and the right of entry upon such premises for the purposes of inspecting such facilities, making repairs or alterations, and/or clearing obstructions that may, in the opinion of the TOWN, endanger or interfere with the proper maintenance and operation of the same.

TO HAVE AND TO HOLD the aforesaid Easement unto the TOWN, its successors and assigns forever.

The GRANTOR, for GRANTOR and GRANTOR'S successors and assigns, covenants with the TOWN, its successors and assigns, that the GRANTOR is seized of the premises in fee simple, that such premises are free from all encumbrances, that GRANTOR has good right and lawful authority to convey the same; and that GRANTOR will warrant and defend the premises unto the TOWN, its successors and assigns, against the lawful claims of all persons.

IN WITNESS, GRANTOR has executed and sealed this document the day and year first written.

GRANTOR:

CABARRUS COUNTY BOARD OF EDUCATION

BY:_____
CHAIR

CABARRUS COUNTY

BY:_____
CHAIR, BOARD OF COMMISSIONERS

STATE OF NORTH CAROLINA
COUNTY OF CABARRUS

I, _____, a notary public in and for said County and State, do hereby certify that _____, Chair of the Cabarrus County Board of Education, personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

WITNESS my hand and notarial seal, this ____ day of _____, 2023.

_____(SEAL)
Notary Public

STATE OF NORTH CAROLINA
COUNTY OF CABARRUS

I, _____, a notary public in and for said County and State, do hereby certify that _____, Chair of the Board of Commissioners of Cabarrus County, personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

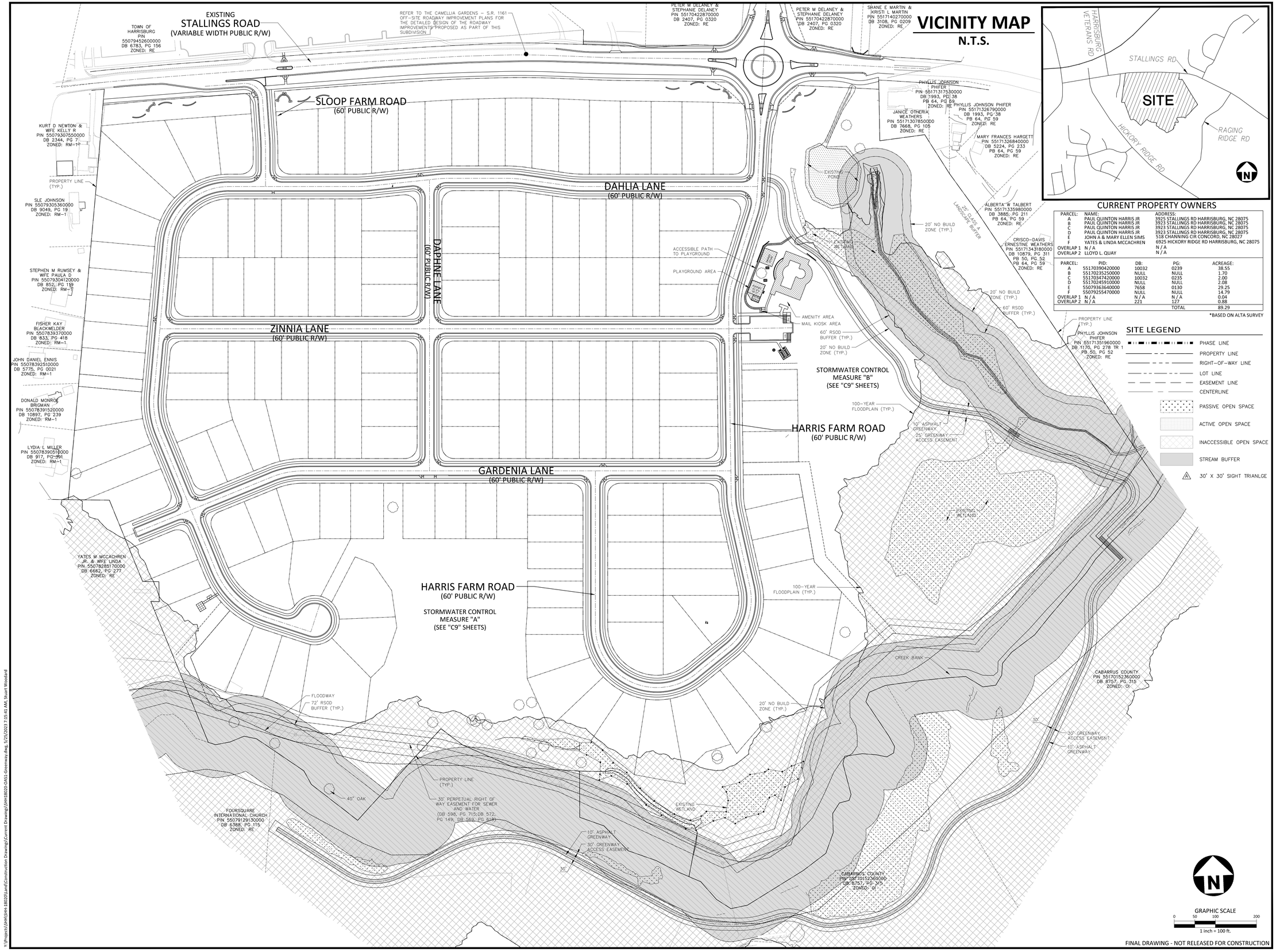
WITNESS my hand and notarial seal, this ____ day of _____, 2023.

_____(SEAL)
Notary Public

STATE OF NORTH CAROLINA
CABARRUS COUNTY

The foregoing certificate(s) of _____
Notary Public of Cabarrus County, is/are certified to be correct according to law. Filed for registration on the ___ day of _____, 2023, at _____o'clock ___M, and duly recorded in the office of the Register of Deeds of Cabarrus County, North Carolina.

Register of Deeds
Cabarrus County
BY: _____



FINAL DRAWING - NOT RELEASED FOR CONSTRUCTION

McADAMS
The John R. McAdams Company, Inc.
3430 Toringdon Way
Suite 110
Charlotte, NC 28277
phone 704. 527. 0800
fax 919. 361. 2269
license number: C-0293, C-187
www.mcadamsco.com

CLIENT

EMPIRE COMMUNITIES
8008 CORPORATE CENTER DRIVE SUITE 300
CHARLOTTE, NORTH CAROLINA 28226
PHONE: 704.602.3307

EMPIRE

CAMELLIA GARDENS SUBDIVISION

CONSTRUCTION DRAWINGS
3925 STALLINGS ROAD
HARRISBURG, NORTH CAROLINA, 28075

NORTH CAROLINA CERTIFICATE OF AUTHORIZATION THE JOHN R. McADAMS COMPANY, INC. C-0293

NORTH CAROLINA PROFESSIONAL ENGINEER SEAL 035747 ROBERT M. REDDICK, JR.

REVISIONS

NO. DATE

PLAN INFORMATION

PROJECT NO.	SHH-18020
FILENAME	SHH18020-OAS1
CHECKED BY	SAW
DRAWN BY	LPM
SCALE	1"=100'
DATE	06. 24. 2021

SHEET

OVERALL SITE PLAN

C2.00

Y:\Projects\SHH\SHH-18020\Land\Construction Drawings\Current Drawings\SHH18020-OAS1-Greenway.dwg, 5/25/2023 7:15:41 AM, Stuart Woodard


Year Floodplain
100 Year Floodplain
Floodway
100 Year Floodplain
100 Year Floodplain
Floodway
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Floodway
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Floodway
500
100 Year Floodplain

Cabarrus County shall not be held liable for any errors in the data represented on this record. This includes errors of omission, commission, concerning the content of the data, and relative positional accuracy of the data. The data cannot be construed to be a legal document. Primary sources from which this data was compiled must be consulted forverification of information represented on this map document.

Physical Address:	7336 RAGING RIDGE RD HARRISBURG NC 28075	PIN14:	55170152360000
Account Name 1:	CABARRUS COUNTY	Account Name 2:	
Mailing Address:	PO BOX 707	Mailing City:	CONCORD
Mailing State:	NC	Mailing Zip Code:	28026
Property Real ID:	01-017 -0010.70	Plat Book:	00000
Plat Page:	00000	Land Units:	63.81
Units Type:	AC	Land Value:	AC
Building Value:	21409940	OBXF Value:	581580
Assessed Value:	29193120	Market Value:	29193120
Sale Year:	undefined	Sale Month:	undefined
Sale Price:	undefined	Deed Book:	undefined
Deed Page:	undefined	Fire District:	undefined
Zoning:	undefined	Elementary School:	Harrisburg ES
Middle School:	Hickory Ridge MS	High School:	Hickory Ridge HS
Precinct Name:	undefined	Legal Description:	NE SIDE HICKORY RIDGE RD
Floodway:	Yes	100 Yr Flood:	Yes
500 Yr Flood:	Yes	Watershed	undefined
FIRM Panel Number	5517		

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
County Manager - Provider for Regional Behavioral Health Center

BRIEF SUMMARY:
The County has received $32.5 million from the State of North Carolina to design and construct a regional behavioral health facility. A Request for Proposals (RFP) was issued on January 18, 2023, with two proposals received by the due date of March 17, 2023. Interviews with each firm were conducted by County staff on Friday, May 5, 2023. Staff recommends entering contract negotiations with Monarch to operate the facility.

REQUESTED ACTION:
Motion to authorize the County Manager to negotiate and execute a contract with Monarch, subject to review and revision by the County Attorney, to operate the Cabarrus County Regional Behavioral Health Facility.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Rodney Harris, Deputy County Manager

BUDGET AMENDMENT REQUIRED:
No

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

ATTACHMENTS:

- Monarch RFP Response
- Monarch RFP Response Attachments



REQUEST FOR PROPOSAL

CABARRUS COUNTY
REGIONAL BEHAVIORAL HEALTH CENTER

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Executive Summary

Founded in 1958, Monarch is committed to enhancing existing psychiatric crisis response systems that maximize the quality of life for the people we support by providing evidence based, trauma informed care across a robust line of services. Our agency employs ~1500 staff across our 178 locations serving more than 29,500 people from 95 North Carolina counties to support a population that is largely underserved, with a majority being Medicaid-eligible, uninsured/underinsured and/or receiving state funding support. Our mission statement says that Monarch provides hope, promotes wellness, and empowers individuals and families impacted by mental illness, substance use disorders, intellectual and developmental disabilities, and traumatic brain injury. We do this by putting the person first, prioritizing staff and staff's lives second, and the company third.

Sound financials, high quality care delivery, decades of experience, and a strong data driven performance assessment culture contribute to Monarch's success. With 65 years of expert-level service to North Carolina, Monarch has earned the Gold Seal accreditation from The Joint Commission, indicating its alignment with the highest quality standards in behavioral health care delivery.

Please see Attachment 1: Monarch Locations and Services Offered

Background of Organization

As a leading behavioral health provider in North Carolina, Monarch has extensive experience launching new services against established timelines. Monarch's service implementation team includes clinical and operations staff, along with representatives from information technology, human resources, marketing and communications, finance, performance improvement, safety and credentialing, transportation, and licensure. Monarch provides hope, promotes wellness, and empowers individuals and families impacted by mental illness, substance use disorders, intellectual and developmental disabilities, and traumatic brain injury. Our focus is on recovery.

Monarch has extensive experience providing all the services in this RFP except for PRTF facilities. Monarch has provided adult Facility-Based Crisis and SUD/Detox services in Lumberton since 2011. For the past five years we have provided Behavioral Health Urgent Care services with Alliance in Wake County, and Facility-Based Crisis services for children and adolescents in Charlotte. We also provide PATH services to assist the unhoused population in Mecklenburg County. Monarch was chosen by Alliance for an integral partnership to pilot Care Management Agency services for behavioral health, intellectual and developmental disabilities, and traumatic brain injury populations and was selected by all six of North Carolina's Tailored Plans to provide Care Management services. In addition to the services in the RFP, Monarch provides long term residential care to children and adolescents in two group homes, adults with mental illness and I/DD in 80 homes, apartments, and community placements. Monarch offers day services to multiple populations, supports people to find work using evidence-based practices, and provides a plethora of community services to these populations. Monarch operates 17 outpatient programs across the state, as well as offering enhanced services including ACTT, IPS, Community Support Team, Intensive In-home services and psychosocial rehabilitation services including one program that is certified as an international clubhouse model. Our services are both onsite and virtual.

Monarch Service Delivery Philosophy

Monarch first believes it is important to listen to the people we support. We use a whole person approach, with an integrated trauma informed care model to meet all needs, including the eight areas of wellness: physical, emotional/mental, intellectual, social, occupational, financial, spiritual, and environmental. Rather than focus on illness, Monarch focuses on recovery, builds on individual's strengths, and pays close attention to social determinants of health. Our trauma informed care uses evidence-based tools and practices to develop individual strength-based care plans that provide the appropriate level of care needed to meet the complex needs of the people we support. We find that many people prefer to get all their services from Monarch, so we offer an array of service lines, though we work with partner providers and agencies in many areas of the state to ensure that an individual's needs are met. When someone receives services from multiple providers, we focus on bringing those providers together, so the individual has one comprehensive plan, not multiple disconnected plans.

Our core values, which apply to volunteers, staff, board, and the people we serve are integrity, compassion, respect, excellence, courage, and innovation. These values directly correlate to the Ten Essential Values of SAMHSA. In addition, we believe it is important to listen carefully; every person has something to teach us. What sets Monarch apart from other providers is that we make sure all staff are committed to our values and support our mission.

Monarch believes in the phrase, "Nothing about me, without me", and includes the individual in all aspects of planning for life. Each person supported has a treatment plan that is individualized and appropriate for that person, focused on recovery.

Monarch would also like to propose that if given the opportunity to provide services in this RFP, we would like to work with an advisory group of Cabarrus County residents who can provide

feedback, help modify programs if there are specific needs for Cabarrus County residents, review and advise on policy development or changes, and advocate on behalf of the community if state rules are contrary to treatment. We envision this collaborative to be a mix of partners including county officials such as someone from DSS, members of the community who are interested and knowledgeable about these types of services and once in operation, people who have used the service and/or their family members.

Please see Attachment 2: Monarch Mission, Vision, Values

Staff Recruitment

Skilled and passionate staff, committed to carrying out the mission, vision, and values of Monarch are the foundation of the organization. Staffing begins with our talent acquisition teams consisting of recruiters, a dedicated staff member who sources talent and coordinators who deploy a multidimensional approach to recruiting well-qualified staff who have experience with the population they serve. Our talent acquisition teams are with our new hires from prospecting/application through orientation. From promoting within, employee referrals, use of social media and using platforms like Indeed to host virtual job fairs, Monarch utilizes a variety of approaches to attract the top talent in the industry.

Staff Education/Training

Monarch uses a blended learning model for staff education/training. Each position in the organization has a training profile that includes a new hire orientation and required training set forth by Medicaid/State/Federal rules and regulations, and any current accrediting body based on the role and level of professional training. This list of training is expanded by Monarch to include what we believe to be critical, such as trauma informed care. In addition to in-person training, Monarch utilizes Relias Learning for online training opportunities and Power DMS to ensure staff remain up to date on current policies and standard operating procedures.

All web-based required training is offered through the Relias Learning platform. Training is developed by licensed/certified staff who are subject matter experts in the topic of the training. Staff can utilize Relias to complete continuing education hours for many different professional licenses and certifications and to develop additional skills.

In addition to all required state/licensure trainings, staff are empowered through training and continuing education that includes trauma informed care and Person-Centered Thinking Recovery and Resilience training which provides thinking strategies and tools for people receiving mental health and/or substance use services. Monarch also uses various conferences, both in state and nationally to ensure we are on the cutting edge of new ideas and concepts.

Technology Forward Data Driven Organization

At Monarch, we have invested in our technology infrastructure and staffing to provide instant 24/7 access to all personal health records and agency databases that drive decision making. Our Information Technology services team led by our Chief Information and Chief Technology

Officers ensures our solutions architects, data analysts and application analysts support the organization using a variety of platforms to organize and design data to improve outcomes.

Monarch's network administration team plays a critical role in securing our company's computer systems and data from cyber-attacks. They are responsible for implementing and managing security measures such as firewalls, intrusion detection and prevention systems, antivirus software, and encryption protocols. Staff ensure our software and operating systems are up to date with the latest security patches and fixes. Additionally, they monitor the network for any suspicious activity and investigate potential security breaches. By working proactively to prevent cyber-attacks and responding quickly, when necessary, Monarch's network administration staff helps protect sensitive data and critical infrastructure from malicious actors.

Personal health information security is a priority at Monarch. To satisfy the highest levels of security for the protected health information of the people we support, all Monarch systems are fully HIPAA-compliant, and imbued with strict data access and role-based security constructs so that every system interaction is logged and reportable on-demand. Furthermore, all Monarch systems are securely hosted with ultra-high availability services that minimize downtime via state-of-the-art data centers with high availability infrastructure and optimal performance configurations. All data centers include industry leading, best of breed equipment and software, including enterprise level primary and secondary sites with 24 hour, 7 days a week, 365 days a year monitoring. All server rooms are secured with biometric thumbprint readers and monitored by security cameras. Our data centers have built-in redundancy for all power and cooling systems, as well as whole-system data replication in real-time.

Monarch collects a variety of data that is routinely disseminated throughout the organization as appropriate and utilized in the decision-making process. Measurement-based care and program performance data are archived in the electronic health record system (Credible) and available to be retrieved and analyzed by program directors, executive leadership, and other staff. Reporting is routinely and systematically utilized, and data is verified in various committees and sub-committees within the organization. Tools within the electronic health record and in other auxiliary systems are utilized to provide data dashboards to staff. Data reporting informs both our philosophical and mission-related objectives as well as day-to-day operations. The organization is thoroughly involved at all levels with data collection and analysis.

Decision making at Monarch is data driven. Anecdotal and case data are useful for refining and understanding the congregate data we collect and use for decision making. However, without the use of data, decisions cannot be based on comprehensive, thorough analysis of issues.

If granted the opportunity, the requirements of this RFP will be incorporated into our performance improvement, data collection and reporting processes and monitored accordingly to ensure project success.

Relevant Organization Policies and Procedures

As mentioned earlier, Monarch uses a policy system (Power DMS) that ensures all policies are reviewed on a timely schedule, modified as necessary, and approved by the board and/or other appropriate body. All staff have access to these policies and can easily search using a keyword to find the methods to handle whatever situation the employee has encountered. Policies/procedures and standard operating procedures (SOPs) are continually reviewed at staff meetings, as well as assigned as training for appropriate staff. The benefit of this system is that people are never looking through old, printed policies and procedures; always having access to the newest information that meets state standards and quality metrics.

Please see Attachment 3: Monarch Policies and Standard Operating Procedures List

Proposed Cost Model

Monarch's Chief Financial Officer and Budget Analyst worked with c-suite operational leaders to develop a comprehensive cost model broken out by each of the four service lines for the Cabarrus County Behavioral Health Center. Monarch has in depth experience running a BHUC and Adult FBC and SUD program and will use similar staffing that meets and often exceeds state required staffing. Monarch is also well positioned to develop an appropriate PRTF cost model based off the combined experience in running the Goodale Recovery School and the SECU child and adolescent FBC.

Monarch anticipates expenses for startup. Typically, in addition to those provided by the county such as furniture, additional expenses can include technology, program supplies and hiring/training expenses. Monarch welcomes the opportunity to discuss the source of funds for this with Partners and Cabarrus County.

Monarch's financial statements as of June 30,2022 and 2021 were audited by Davidson, Holland, Whitesell & Co., PPL on October 20, 2022, without findings. Monarch utilizes a diverse set of funding types which include Government Grants, Foundations, Corporations, Individual Donors, Membership Income, and Earned Income.

Please see Attachment 4: Issued Financial Statements
Please see Attachment 5: Monarch Proposed Cost Model

Scope of Work

General Proposed Staffing Model and Leadership Structure

Monarch believes that with the scope of this project, there needs to be a Centralized Director (Vice President, Cabarrus County Behavioral Health Center) who will ensure that each component of service is effective and working in coordination with other services.

Execution for the Cabarrus County Behavioral Health Center as it relates to this RFP will also include Program Directors, Psychiatrists, Physician Assistants, Psychiatric Nurse Practitioners, Licensed Clinical Therapists, Behavioral Technicians, Qualified Professionals, Registered Nurses, Occupational Therapists, Certified Occupational Therapy Assistants, Peer Support Specialists, Teachers, including EC Certified Teachers, Administrative Assistants and Security. Additional staff including facilities and information technology helpdesk support, call center, human resources and talent acquisition, finance, marketing and philanthropy, and performance improvement specialists will support the operation off site. Please see each specific service below for specific proposed staffing model and leadership structure.

Given the breadth and depth of the proposal, it is recommended that a commercial kitchen be available, and that a chef and assistants be hired to provide food that is attractive, healthy, and has excellent taste. Individuals have basic needs for food, shelter, clothing, and so on. When struggling with mental illness, those basics provide a level of safety and security that individuals need. People supported do not need to stress about food, portions, or dietary needs. That is the job of the program.

In addition, all services will have access to an on-call system for psychiatrists and/or nurse practitioners, as well as management staff for operational concerns. You will see in the staffing models for each program that we have ensured that operations leadership is on site daily, Monday through Sunday, and is also available on second shifts. On call would be primarily used for overnight concerns.

Evidence-Based Treatment

Monarch offers treatment services, specialties and evidence-based therapies for the associated noted diagnoses: Cognitive Behavioral Therapy (depressive disorders, anxiety disorders, psychotic disorders); Dialectical Behavioral Therapy (personality disorders); Motivational Interviewing (SUD, depressive disorders, anxiety disorders, bipolar spectrum disorders, psychotic disorders); Family-Centered Treatment (DMDD, ODD, Conduct Disorder, depressive disorders, anxiety disorders); Mindfulness-Based Cognitive Therapy (SUD, depressive disorders, anxiety disorders, bipolar spectrum disorders); Solution Focused Brief Therapy (SUD, depressive disorders, anxiety disorders, bipolar spectrum disorders); EMDR (PTSD); Trauma-Focused Cognitive Behavioral Therapy (PTSD, depressive disorders, anxiety disorders, DMDD, ODD); Forensic Therapy (all diagnoses); Medication Assisted Treatment (opioid use disorders); MATRIX (substance use disorders) and Whole Health Action Management (all diagnoses). We also use the twelve steps of recovery from AA and NA, to ensure that when people leave us, they have access to those support groups 24/7.

At Monarch, we believe that standardized measurement tools can be powerful aids for diagnosing behavioral health conditions, assessing treatment response, providing data for data driven decisions and informing future course of treatment. We currently use the DLA-20, PHQ-9, PHQ-A, the GAD-7, the LEC-5, the LOCUS, the CALOCUS, the CAGE-AID, the ASAM, the AUDIT-C, the RAS, and the Columbia Suicide Severity Rating Scale (C-SSRS) standardized risk assessment screening tool, completed at assessment, and as needed.

In addition to group learning, part of this model can include wrap around services as defined by each individual treatment plan. This includes working with licensed professionals to incorporate individual and group therapy, medication management and symptom management, and recovery principles. It is possible that these individuals will also access ACTT or CST team services, or other services designed to prevent re-hospitalization.

Occupational therapy will use evidence-based models of care for assessment and treatment for developing community skills, independent living skills, and so on, ensuring that individuals are accessing modes of treatment that meet any cognitive or educational methods of learning that are most appropriate for the individual.

The program staff will work closely with other professionals to ensure that appropriate treatment continues post discharge, such as therapy (i.e., DBT, CBT, SUD services), psychiatric services and physical health services.

Community Collaborations

Monarch collaborates with many local partners, including departments of social services, law enforcement, magistrates, EMS and/or advanced paramedics, health departments, schools, other behavioral health providers, and advocacy groups. In Cabarrus County, Monarch is a member of the Cabarrus Community Collaborative and supports the Cabarrus County Schools as a presenter and participant in their annual experiential resource fairs for staff and will participate in the resource fair for parents in May. We work closely with DSS to ensure we have a streamlined referral process, especially for youth in crisis to receive services at our SECU Child and Adolescent FBC in Charlotte and have been a presenter with Atrium Health - Cabarrus Hospital, to ensure their patients are connected to appropriate levels care upon discharge. We also are a partner with Amazing Grace Advocacy to help them support families of children diagnosed with a mental health or developmental disability and have been a presenter for the Mental Health America of the Central Carolinas – Cabarrus County Family and Parent Support Groups. We have a great relationship with NAMI Cabarrus and support them with presentations and distribution of their information.

Monarch regularly serves as a host site for Crisis Intervention Team (CIT) training for EMS personnel and law enforcement officers. We collaborate with magistrates, law enforcement, and EMS to request an Involuntary Commitment (IVC) and are a member of the RCORP Consortium, which also includes the sheriff's department, county DA, and a judge. In neighboring Mecklenburg County, staff interact with local law enforcement through our Project for Assistance with Transition from Homelessness (PATH) program and their Law Enforcement Assisted Diversion (LEADS) program.

Behavioral Health Urgent Care

Monarch opened one of the first Behavioral Health Urgent Care Crisis Centers in North Carolina for those who are experiencing a crisis and are in immediate need of assessment.

Monarch's BHUC treatment model is designed to provide assessment, stabilization, and psychiatric intervention for people ages 4 and older who are experiencing a behavioral health crisis. A multidisciplinary team that includes nursing staff, licensed therapists, experienced medical professionals, qualified professionals, and peers provides the services. This program is designed to ensure people are linked to the least restrictive and most appropriate level of care that promotes their continued recovery. The BHUC also serves as a means of diversion from the use of emergency departments or hospitals and can initiate the involuntary commitment (IVC) petition via first-level evaluations (clinician petition) for people who require IVC. Our BHUC programs provide a safe, secure, and healthy environment where stabilization, healing, and recovery can begin.

Proposed Staffing Model

We plan to staff the model in the same effective way that we currently staff our BHUC in Wake County (Raleigh) with added peer support specialists, dedicated LCASs, chef/chef assistants to accommodate Tier IV services. Staff will include APPs – NP/PAs, Registered Nurses, Behavioral Therapists, Qualified Professionals in addition to the above-mentioned Peer Support Specialists, LCASs, Chef and Chef Assistants and security. BHUC FTEs are detailed in *Attachment 5: Monarch Proposed Cost Model.*

Leadership Structure

Leadership will include a BHUC Program Director, who will report to the Vice President of the Behavioral Health Complex and will be included as part of the Regional Behavioral Health leadership team. There will also be an Assistant Program Director, Associate Medical Director, and Nurse Manager. Additional leadership will include a lead psychiatrist and lead therapist.

Financial Management Capabilities

Monarch has established financial policies and standard operating procedures (SOPs) that remain the same for each service line across the organization. All policies and SOPs are easily accessible through Power DMS – our online document library platform which alerts staff when policies and SOPs have been updated or added. Staff are responsible for providing an electronic signature confirming review of updates or new policies/SOPs. Management runs staff compliance reports for policy/SOP reviews through a dashboard when they login to Power DMS.

Please see attachment 6: Detailed Monarch Financial Capabilities

Child and Adolescent Psychiatric Rehabilitation Treatment Facility

Monarch will model the PRTF using effective components of both our therapeutic boarding school, Goodale School for adolescent boys ages 14-18 who struggle with substance use and co-occurring disorders and our SECU Youth Crisis Center that provides short-term stabilization for

young people between the ages of 6-17 who are experiencing an acute psychiatric episode or are in mental heal or substance use crisis.

The Goodale School program combines comprehensive clinical support with an accredited academic program and family support to create an individualized recovery experience for the youth. The academic program is individually customized to accommodate each student's learning ability, strengths and interests and is directed by a certified EC teacher who can provide instruction and accommodations as defined by Individualized Education Plans and plans generated through Section 504. The clinical emphasis includes individual therapy, group therapy, and one session per week with the family and the youth. If children are to return to their families, it is critical that the families be involved in treatment as well. Therapists do not only work with students individually or in groups, but also participate in the general milieu, as we know that teens in particular want to talk to someone when the urge hits, not necessarily when the structure directs. That means that therapists participate in activities in the structure – games, exercise, pottery classes, cooking classes and off-site events such as whitewater rafting and camping.

SECU Youth Crisis Center offers age-appropriate treatment to youth and adolescents in individual and group settings, with medication as needed and provides access to a variety of individual and family services to help the youth manage their illness in their community. Under the direction of a psychiatrist and other medical and professional staff, the program provides short-term therapeutic interventions designed to prevent hospitalization by stabilizing a child's crisis and linking them to needed care.

Because of these experiences, we are confident that we can manage an effective PRTF facility. Our plan is to provide significant structure based on positive approaches. The children's day will be organized as closely as possible by age and interest. We anticipate having certified teachers on site who can run small group classes for academics; therapists on site who can run group or classes around areas such as coping skills, emotional regulation, and anger management; occupational therapists on site who can focus on sensory deficits, occupational deficits, and appropriate leisure skills with an eye towards improving self-esteem.

Treatment will include scheduled individual and group therapy sessions that utilize evidence-based practices such as cognitive behavioral therapy and occupational therapy. Time will be allotted for academics/schoolwork and participating in recreational activities such as practicing yoga, playing games, art, physical activity, and mindfulness activities.

Monarch also does not believe in the use of planned restraints. Although all staff are trained in appropriate curriculums, we focus on de-escalating situations before they become significant conflict and have been very successful with this in our adolescent FBC. We have recently implemented the UKERU system, used in multiple PRTFs across the country. Using this system eliminates the need for physical restraint and keeps everyone, both the child, other children, and staff, safe.

Proposed Staffing Model

There will be a Program Director that is available both days, evenings, and weekends, along with a back-up to this person in case of illness and to cover more shifts.

Monarch will ensure that there are always well-trained behavioral technicians on site, at the required ratio or better. We often find that specific students do better with smaller groups and more attentive staff, so will add staff as needed. Also in ratio will be teachers including an EC teacher who will have small groups of students for academics during the day. At least four teachers will be available for various academic classes during the day. A full-time psychiatrist will be available as well as on-call psychiatrists as necessary and there will be nursing staff on site 24/7. There will be clinical social work staff as well as clinical occupational therapy staff to provide individual and group therapy and there will also be qualified professional staff to function as care managers for the students. PRTF FTEs are detailed in *Attachment 5: Monarch Proposed Cost Model.*

Leadership Structure

The Leadership Team at the PRTF will consist of the PRTF Program Director, and a Lead Psychiatrist, Nurse, Therapist, and Behavioral Technician. The PRTF Program Director will be supervised by the Vice President Operations, for the Cabarrus County Behavioral Health Center.

Financial Management Capabilities

Please see attachment 6: Detailed Monarch Financial Capabilities

Adult Facility Based Crisis (10 Bed)

Monarch currently manages a highly successful ten bed adult facility-based crisis program in Lumberton. We propose replicating that model for this proposal. Our Facility-Based Crisis (FBC) program is the first step in life-changing treatment for adults who are at risk of self-harm or harming others and/or suffer from mental illness that requires a short-term intensive evaluation and treatment. Under the clinical oversight of a psychiatrist, we offer a 5–7-day residential program that provides short-term stabilization, a comprehensive clinical assessment, treatment intervention, and aftercare planning. Once discharged, an individual is linked with community services that may include therapy, psychiatry, housing, employment, food, or whatever the individual needs.

Caring and experienced staff provide round-the-clock support and treatment via individual therapy, daily psychiatric assessment, group therapy, nursing services, and peer services. Because the service is designed as a time-limited alternative to hospitalization for an individual in crisis, upon discharge each person leaves with a personalized recovery focused care coordination plan that includes verification of 7 day follow up. We attempt to ensure that the individual meets with a community provider, or at minimum connects with a peer or other familiar staff. Our Facility-Based Crisis programs provide a safe, secure, and healthy environment where healing and recovery can begin.

Staffing Model

Direct care staff will consist of an Associate Medical Director, Psychiatrist, APP – NP/PA, Nurse Manager, Registered Nurses, Behavioral Therapists, Behavioral Technicians, Qualified Professionals, and Peer Support Specialists. There will also be a Chef and Chef Assistant to prepare meals for the people supported. Adult FCB FTEs are detailed in *Attachment 5: Monarch Proposed Cost Model.*

Leadership Structure

The Adult FBC will have a Program Director and the Leadership Team will consist of the Director, Associate Medical Director, Psychiatrist, Nurse Manager, and Lead Therapist.

Financial Management Capabilities

Please see attachment 6: Detailed Monarch Financial Capabilities

Adult Substance Use Disorder (10 Bed)

As we all know, the opioid crisis has not abated. Monarch currently operates a ten bed Facility-Based Crisis (FBC) program specifically for adults with substance use disorder, although they may have co-occurring mental illness or other disability. We propose replicating that model for this RFP.

In this program, under the clinical oversight of a psychiatrist, we will offer a 5–7-day residential program that provides short-term stabilization, a comprehensive clinical assessment, treatment intervention, non-hospital medical detoxification, education about substance abuse, introduction to the twelve-step program model (AA) and aftercare planning. This service is designed as a time-limited alternative to hospitalization for an individual in crisis.

For people with a substance use disorder, this is often the first step in life-changing treatment. We offer all the services that are in the mental health facility-based crisis program with an added emphasis on education and therapy to help the individual understand the need to stop using. Monarch also provides medication-assisted treatment (MAT) when appropriate for the treatment of opioid use disorder.

In this program, caring and experienced staff will provide round-the-clock support. At Monarch, we attempt to hire primarily staff who are in recovery which includes full-time LCAS staff who are specialists in substance use disorders, as well as peer staff. We know a significant issue for people with substance use disorder is stating the truth and have found that by incorporating peers and staff who are in recovery onto to our treatment teams, dishonesty is less able to be sustained.

Upon discharge each person supported leaves with an individual care coordination plan linking them with community services that can include information about AA meetings, therapy, psychiatry, housing, employment, food, or whatever their individual needs require. This plan

includes verification of 7 day follow up with a peer or other familiar staff they worked with during their stay at our FBC. If an individual is committed to sobriety and needs more treatment, we refer to a plethora of longer-term programs in NC that typically accept Medicaid or are offered for free or very low cost.

Our Facility-Based Crisis programs provide a safe, secure, and healthy environment where sobriety, healing and recovery can begin. We know that relapse is common and expected among substance users, so it may be typical to accept a person more than once for this service. We stress that substance use disorder is a disease, not a moral failing. Given that this disease is not curable but is manageable, we know that relapse can occur. Unlike some programs, we do not expect a person to have treatment and be "cured". We know this is a lifelong experience, and teach coping, recovery, and management skills as appropriate.

Staffing Model

Staffing will be the same as the Adult FBC with the addition of a Licensed Clinical Addiction Specialist. Adult SUD FTEs are detailed in *Attachment 5: Monarch Proposed Cost Model*.

Leadership Structure

The Adult FBC will have a Program Director and the Leadership Team will consist of the Director, Associate Medical Director, Psychiatrist, Nurse Manager, and Lead Therapist.

Financial Management Capabilities

Please see attachment 6: Detailed Monarch Financial Capabilities

Funding Facility Operations

Monarch manages revenue and expense tightly to be as efficient as possible. While we have provided detailed budgets and our monthly financial review process, there are many controls we place on our operations to maximize revenue, minimize expense, and operate efficiently. Some of those are detailed below:

Insurance/Medicaid Verification

Monarch verifies each patient's insurance or Medicaid eligibility prior to each visit so the individual understands the expected co-pay or payment required if applicable. We request co-pays up front when possible and do this for both virtual and in person appointments.

Billing

Monarch recently invested in a text message service that allows us the ability to provide bills to individuals via text message/cell phone. This is preferred to mailing bills for our patients who move often, as well as those younger individuals who have used technology their entire lives. We also have an online portal which people can access 24/7/365 to pay their bills.

Patient Payment and Write-Offs
We monitor patient payments carefully. Although we can use a company to obtain payment on overdue bills, our philosophy is that for people that are exceptionally low income, medical debt is one more stress that adds to the individual's life that is not needed. We write off those bills, knowing that payment will not occur because would rather see people feed families or maintain their housing. Because of this philosophy, we ensure that other services balance our need to provide free services to some individuals.

Non-UCR Money
Monarch works with each of the LME/MCOs to find non-UCR money to cover as many people as possible that do not have funding, and create "shadow claims" which allows us to process the information appropriately in our metrics. In every business like ours there are discrepancies between what is billed versus what is paid or denied. These claims are carefully monitored and managed by our billing staff who work with our operations staff to ensure that things like target populations, authorizations, and other required information is correct on every bill so we can get paid.

Provider Productivity
To maximize revenue, each billing provider is responsible for productivity measures balanced with a quality component. For example, a psychiatrist will have specific targets of number of people to see but will be held to data driven quality measures at the same time. New providers or therapists have specific ramp up expectations of patients seen per month that is lower than established staff. We want to see the quality of a provider in addition to quantity.

Staff/Performance Audits
Monarch regularly reviews our organizational structure to ensure that all positions are needed, especially in administrative departments.

While there are many more aspects to our revenue management, this gives some insight into our operations. As a mission driven non-profit, our philosophy is to spend most of our income on the people we support. The Monarch board of directors are insistent about this and watch closely to ensure that our funds are spent where our values sit but they also understand the staffing crisis that has been termed "The Great Resignation." By establishing both performance and quality measures, staff are able have salaries they perceive as consistent with market and their value.

References

At Monarch, we are a proud partner with many organizations across the counties we serve and make ourselves available to support others in serving their population with the highest quality of care. Attached you will find letters of recommendation from a diverse group of partners, an

email from Penny Markey, a person supported in our Lumberton Adult FBC who now works as a peer support specialist and a letter of good standing from Partners LME/MCO.

Our mission driven marketing team works hard to break the stigma of mental illness and substance use disorder by featuring stories of people in recovery as well as highlights of our facilities to help people feel they are not alone and give people an understanding of what to expect when they enter one of our facilities. If granted the opportunity, these strategies would be deployed to introduce the Cabarrus County Behavioral Health Center. Please click on the links in "Feature Highlights" section below, to be directed to the stories/short videos on our webpage.

Featured Highlights

Lumberton, Adult Facility Based Crisis, and SUD Facility Overview
https://monarchnc.org/behavior-health/crisis-services-prove-to-be-life-saving-option/

Lumberton, Adult FBC – Penny Markey Offers to Bring Hope to Others
https://monarchnc.org/behavior-health/recovery-offers-opportunity-to-bring-hope-to-others/

SECU Youth Crisis Center – Video Highlight: Meet Ari, a youth supported.
https://youtu.be/HkSqFBA56aI

Lumberton, Adult FBC – Video highlight of Steve, a person supported.
https://youtu.be/OjX1ao8LjUI

Letters of Recommendation

Kevin Turner, Principal Architect, *Human Experience*
Anjie Vickers, President, *NAMI Cabarrus County*
Karen McLeod, President and Chief Executive Officer, *Benchmarks NC*
Kathy Smith, Chief Operating Officer, *Alera Health*
Please See Attachments 7-10

Email of Support

Penny Markey, Peer Support Specialist, *Monarch*
Please see Attachment 11

Letter of Good Standing

Partners LME/MCO
Please see Attachment 12

Results/Evaluation

Clinical Outcome Measures

Monarch currently tracks 18 HEDIS and MIPS/MACRA measures for patients. We improved with these measures and received positive adjusted rates from Medicare as a result. As part of our APM/VBR with our MCOs, we track additional required data to demonstrate performance in areas of hospitalization discharge follow-up, patient progress through treatment and service model fidelity. Another example of this is our collaboration in Wake County with Alliance Health and provider partners who work with children and adolescents we support. Alliance provides data on the APM identifier measuring Metabolic Monitoring for Children and Adolescents on Antipsychotics. HEDIS measures give us a year view on performance. The Target Rate based on 2020 national Medicaid averages is 32%. At the time of last reporting, the rate for children and adolescents supported by Monarch was 51.2%, well above the Medicaid average.

Monarch also works with the standard plan vendors and private insurance companies on metrics. We operate many value-based reimbursement models with these groups as well as the LME/MCOs. All performance improvement initiatives are data driven. Performance improvement data is reviewed monthly or quarterly, depending on the metric, and adjustments are made as needed to obtain the appropriate outcomes desired.

At Monarch we emphasize quality care and regularly audit our staffing levels and effectiveness. An example of this is our SECU child and adolescent facility-based crisis program. We added certified occupational therapy assistants (COTAs) to create schedules, run therapeutic groups and add the clinical component to various activities that were being directed by the behavior technicians. Instead of simply creating and doing a craft suggested by the behavior technician, the COTAs will use the same activity to help a child understand how to manage frustration, sharing, coping skills and other key skills. This addition to our structure has provided additional skills for our behavior technicians, made a difference in how the children perceive the program, and improved the outcomes we see in the children.

We will establish targeted data tracking and performance review measures in conjunction with Cabarrus County and Partners MCO staff to ensure we are providing services and meeting project outcomes as planned. Regular data and performance reviews will determine any necessary service delivery, staffing, or other operational and clinical changes.

Monarch utilizes a Plan Do Study Act (PDSA) model for continuous quality improvement. Quality assessment is accomplished by internal audits, peer reviews, stakeholder feedback, data analysis and employee input.

See Attachment 13: Monarch Clinical Assessment Grid
See Attachment 14: Monarch PI Plan 22-23

Key Financial Indicators

Monarch monitors key financial indicators for profitability, liquidity, and efficiency. For each of the service lines included in the Cabarrus County Behavioral Health Center, we will measure and trend gross margin, net margin, aged receivables by payer, revenue per day, volume metrics and number of FTEs.

The following are examples of key financial indicators tracked at the Agency level:
Gross Margin
Net Margin
Current Ratio
Days Cash on Hand
Days in AR
Cash Ratio

Attachments

Attachment 1: Monarch Locations and Services Offered

Attachment 2: Monarch Mission, Vision, Values

Attachment 3: Monarch Policies and Operating Procedures List

Attachment 4: Issued Financial Statements

Attachment 5: Monarch Proposed Cost Model

Attachment 6: Detailed Monarch Financial Capabilities

Attachment 7: Recommendation, Kevin Turner, hX

Attachment 8: Recommendation, Anjie Vickers, NAMI Cabarrus

Attachment 9: Recommendation, Karen McLeod, Benchmarks NC

Attachment 10: Recommendation, Kathy Smith, Alera Health

Attachment 11: Recommendation, Penny Markey, Monarch

Attachment 12: Letter of Good Standing, Partners LME/MCO

Attachment 13: Monarch Clinical Assessment Grid

Attachment 14: Monarch PI Plan 22-23



REQUEST FOR PROPOSAL

CABARRUS COUNTY RETIONAL BEHAVIORAL HEALTH CENTER

ATTACHMENTS

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Monarch Service Locations and Programs Offered

Location	Programs	Location Type	Primary Address: City	County	LME/MCO
Wayne County Apartments	ACT, Supported Living	Apartment	Aberdeen	Moore	Sandhills
Administration Annex	ACTT	Local Office	Albemarle	Stanly	Partners Health Management
Andrew Isom Road Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Bell Main Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Fourth Street Apartments	PRS/ISS Apartments	Personal Residence	Albemarle	Stanly	Partners Health Management
Greenwood ADP Center	Day Program, ICF Day Program, Community Services	Community Center	Albemarle	Stanly	Partners Health Management
Lilliputian Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Pfeiffer MH Administration Office	Intensive Cation, Community Care Behavioral Health Clinic, Employment Services EPS, In-Home Therapy Services, Medical Assisted Treatment, Outpatient, Peer Support	Headquarters	Albemarle	Stanly	Partners Health Management
Alton I Group Home	Day Program, ICF	Group Home	Albemarle	Stanly	Partners Health Management
Alton II Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Second Street Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Stanly Industrial Services	ESS, Vocational	Community Center	Albemarle	Stanly	Partners Health Management
Stanly Manor	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Bell Hilltop Street Group Home	ICF	Group Home	Angier	Harnett	Sandhills
Brownville Group Home	ICF	Group Home	Arcadia	Lee	Sandhills
Gladstone School Road Group Home	ICF	Group Home	Asheboro	Randolph	Sandhills
Hillcrest Group Home	ICF	Group Home	Asheboro	Randolph	Sandhills
Pine Street Group Home	ICF	Group Home	Asheboro	Randolph	Sandhills
Vocational Opportunities Inc Community	ESS, Vocational	Community Center	Asheboro	Randolph	Sandhills
The Foundation for Recovery Community	Casual	Community Center	Asheville	Buncombe	Vaya Health
Whisper Shores	ICF	Group Home	Beaufort	Carteret	Trillium Health Resources
Life Agencies, Community Living Skills	ESS, Vocational	Community Center	Bessemer	Montgomery	Sandhills
Behavioral Health Wake (Rainville Avenue)	Outpatient	Behavioral Health Outpatient Center	Cary	Wake	Alliance Health
Behavioral Health Mecklenburg (Executive Center)	ACTT, In-Home therapy Services, Intensive In-Home, Mindfulness, Outpatient, Peer Bridger, Transitional Management Services, Community Support Team	Behavioral Health Outpatient Center	Charlotte	Mecklenburg	Alliance Health
Bear Creek Group Home	ICF	Group Home	Charlotte	Mecklenburg	Alliance Health
Carmel Forest Drive Group Home	ICF	Group Home	Charlotte	Mecklenburg	Alliance Health
Pinebeary Road Group Home	ICF	Group Home	Charlotte	Mecklenburg	Alliance Health
Circle North Cross Center	Facility Based Crisis	Crisis Center	Charlotte	Mecklenburg	Alliance Health
Fern City Achievement Center (Fayetteville)	ESS, Supported Living, Vocational	Community Center	Elizabeth City	Pasquotank	Trillium Health Resources
Shelter Opportunities Unlimited	ESS Day Program, Vocational	Community Center	Hayden	Durham	Trillium Health Resources
Fernwood Adult Group Home	ICF	Group Home	Hayden	Durham	Trillium Health Resources
Glade Gardens Apartments	MH Apartments	Apartment	Kernersville	Forsyth	Vaya Health
Parkwood Group Home	ICF	Group Home	Morganton	Burke	Partners Health Management
The Oaks Group Home	ICF	Group Home	Morganton	Burke	Partners Health Management
Trinity Group Home	ICF	Group Home	Morganton	Burke	Partners Health Management
Georgetown Group Home	ICF	Group Home	New Bern	Craven	Alliance Health
Behavioral Health Wake (Judd Parkway)	Outpatient	Behavioral Health Outpatient Center	Peachtree Valley	Wake	Alliance Health
Behavioral Health Nation (Court Drive)	ACTT, Outpatient, Peer Bridger, Community Support Team	Behavioral Health Outpatient Center	Gastonia	Gaston	Partners Health Management
Strand Oaks Apartments	MH Apartments	Apartment	Gastonia	Gaston	Partners Health Management
Lighthouse Club of Currituck	ESS Vocational	Community Center	Grandy	Currituck	Trillium Health Resources
Pasquotank County Group Home	ICF	Group Home	Grandy	Currituck	Trillium Health Resources
Behavioral Health Guilford (Northline Ave)	ACTT, Crisis, Employment Services EPS, Outpatient, TCT	Behavioral Health Outpatient Center	Greensboro	Guilford	Sandhills
Rhind Apartments	MH Apartments, Community Services	Apartment	Greensboro	Guilford	Sandhills
Charlotte Street Group Home	ICF	Group Home	Hamlet	Richmond	Sandhills
Rockwood Street Group Home	ICF	Group Home	Hamlet	Richmond	Sandhills
Community Awards Workshop	ICF Day Program	Community Center	Hamlet	Richmond	Sandhills
Kingsgrove Apartments	Apartments ICF MH	Apartment	Hamlet	Richmond	Sandhills
Carver Street Group Home	ICF	Group Home	High Point	Guilford	Sandhills
Edgewood Circle Group Home	ICF	Group Home	High Point	Guilford	Sandhills
Lexington Road Group Home	ICF	Group Home	High Point	Guilford	Sandhills
Trinity Ridge Road	ICF	Group Home	Kernersville	Guilford	Sandhills
Welcome Group Home	ICF, Day Programs	Group Home	King	Forsyth	Vaya Health
Behavioral Health Scotland (Mc Alpine Lane)	Outpatient	Behavioral Health Outpatient Center	Laurinburg	Scotland	Sandhills
Behavioral Health Davidson (Grimes Blvd)	ACTT Intensive In-Home Outpatient Peer Support	Behavioral Health Outpatient Center	Lexington	Davidson	Sandhills
Harnett Psychosocial Rehabilitation	PSR	Community Center	Lillington	Harnett	Sandhills
Behavioral Health Lincoln (Aldine Street)	Outpatient	Behavioral Health Outpatient Center	Lincolnton	Lincoln	Partners Health Management
Behavioral Health Robeson (Godwin Avenue)	Employment Services EPS Outpatient Community Support Team	Behavioral Health Outpatient Center	Lumberton	Robeson	Cumberlink
Daughtered Arbor	Facility Based Crisis Mobile Crisis	Crisis Center	Lumberton	Robeson	Easterseals
Beech Club of Dare	Day Program ESS	Community Center	Manteo	Dare	Trillium Health Resources
New Horizon Enterprises	ESS Vocational	Community Center	Mocksville	Davie	Partners Health Management
Campus Park Drive	Day Program ICF Day Program	Community Center	Monroe	Union	Partners Health Management
Cairns Lane Group Home	ICF	Group Home	Monroe	Union	Partners Health Management
Old Monroe Group Home	ICF	Group Home	Monroe	Union	Partners Health Management
Ridgefield Group Home	ICF Day Program	Group Home	Monroe	Union	Partners Health Management
Southgate	ICF	Group Home	Monroe	Union	Partners Health Management
Angel on Vision	ICF Day Program	Community Center	Mount Gilead	Montgomery	Sandhills
Carolina Care Group Home	ICF	Group Home	Mount Pleasant	Cabarrus	Partners Health Management
Mt. Gilead Children's Home	ICF	Group Home	Mt. Gilead	Montgomery	Sandhills
Northwood Group Home	Day Programs ICF	Group Home	Mt. Gilead	Montgomery	Sandhills
Greenlyn	ICF	Group Home	Nashville	Nash	Trillium Health Resources
Wells Creek Road Group Home	ICF Day Program	Group Home	New Bern	Craven	Trillium Health Resources
Dogwood House Group Home	ICF Day Program	Group Home	New Bern	Craven	Trillium Health Resources
Health Drive Center	Day Program ESS Vocational	Community Center	New Bern	Craven	Trillium Health Resources
Hale Street Home	ICF	Group Home	New Bern	Craven	Trillium Health Resources
Kimberly Road Group Home	Day Program ICF	Group Home	New Bern	Craven	Trillium Health Resources
Spencer's Place	MH	Group Home	New Bern	Craven	Trillium Health Resources
Vineyard Group Home	ICF	Group Home	Newport	Carteret	Trillium Health Resources
Heath Road Group Home	ICF	Group Home	Norwood	Stanly	Partners Health Management
Hoke County #1 Group Home	ICF	Group Home	Raeford	Hoke	Sandhills
Hoke County #2 Group Home	ICF	Group Home	Raeford	Hoke	Sandhills
Vocational Options of Hoke County	ESS Vocational	Community Center	Raeford	Hoke	Sandhills
Behavioral Health Wake (Navaho Drive)	Employment Services EPS Outpatient	Behavioral Health Outpatient Center	Raleigh	Wake	Alliance Health
Dix Horizon PSR	PSR	Community Center	Raleigh	Wake	Alliance Health
Wyatt Behavioral Health Urgent Care	Behavioral Health Urgent Care	Crisis Center	Raleigh	Wake	Alliance Health
Arden Street Group Home	ICF	Group Home	Robbins	Moore	Sandhills
Middleton Street Group Home	ICF	Group Home	Robbins	Moore	Sandhills
Caroline Drive Group Home	ICF	Group Home	Rockingham	Richmond	Sandhills
Pebble Estate Group Home	Day Programs ICF	Group Home	Rockingham	Richmond	Sandhills
Rebuthur Apartments	Apartments ICF MH	Apartment	Rockingham	Richmond	Sandhills
Pecan Place Group Home	ICF	Group Home	Rockingham	Richmond	Sandhills
Richmond County Apartments	ESS Supported Living	Apartment	Rockingham	Richmond	Sandhills
Richmond Psychosocial Rehabilitation	PSR	Community Center	Rockingham	Richmond	Sandhills
Rockingham Administration	Administration	Local Office	Rockingham	Richmond	Sandhills
Behavioral Health Nash (Tiffany Blvd)	Employment Services EPS Outpatient	Behavioral Health Outpatient Center	Rocky Mount	Nash	Trillium Health Resources
Shay Farm Apartments	Apartments ESS ICF MH	Apartment	Rocky Mount	Edgecombe	Easterseals
Shaftner Court	ESS	Group Home	Rocky Mount	Edgecombe	Easterseals
North Hillside Apartments	Apartments MH	Apartment	Ruther Fordton	Rutherford	Partners Health Management
Lee Psychosocial Rehabilitation	PSR	Community Center	Sanford	Lee	Sandhills
Howell Street	ICF	Group Home	Sanford	Lee	Sandhills
West Blanche Street Group Home	ICF	Group Home	Selma	Johnston	Alliance Health
Behavioral Health Cleveland (West Marion Street)	Employment Services EPS Outpatient	Behavioral Health Outpatient Center	Shelby	Cleveland	Partners Health Management
Buffalo Creek Apartments	Apartments MH	Apartment	Smithfield	Johnston	Alliance Health
North 7th Street Group Home	ICF	Group Home	Smithfield	Johnston	Alliance Health
Connecticut Avenue Group Home	ICF	Group Home	Southern Pines	Moore	Sandhills
Pinehurst Social Community Center	Day Program ESS Supported Employment Vocational Community Services	Community Center	Southern Pines	Moore	Sandhills
Oak Drive Group Home	ICF	Group Home	Southern Pines	Moore	Sandhills
Pennsylvania Avenue Group Home	ICF	Group Home	Southern Pines	Moore	Sandhills
Stone County Group Home	ICF	Group Home	Stanton	Wake	Trillium Health Resources
Montgomery Adult Group Home	ICF	Group Home	Troy	Montgomery	Sandhills
New View Apartments	Apartments ESS ICF MH	Apartment	Tryon	Polk	Vaya Health
Senior Adult Group Home	ICF	Group Home	Statesboro	Wake	Sandhills
Behavioral Health Wake (Hodding Avenue)	Outpatient	Behavioral Health Outpatient Center	Wake Forest	Wake	Alliance Health
Vision Opportunity Center	ESS Vocational	Community Center	Walnut Cove	Stokes	Vaya Health
Walnut Cove Apartments	Apartments ESS MH	Apartment	Walnut Cove	Stokes	Vaya Health
Caribbean Apartments (Beaufort)	Apartments MH	Apartment	Washington	Beaufort	Trillium Health Resources
Main Street Group Home	ICF	Group Home	Washington	Beaufort	Trillium Health Resources
Columbus Industries	Day Program ESS Vocational	Community Center	Whiteville	Columbus	Trillium Health Resources
Pine Hanover PSR	PSR	Community Center	Wilmington	New Hanover	Trillium Health Resources
Behavioral Health Wilson (Forest Hills Rd)	Outpatient	Behavioral Health Outpatient Center	Wilson	Wilson	Easterseals
Whitehorse Group Home	ICF	Group Home	Wingate	Union	Partners Health Management
Behavioral Health Forsyth (Cherry Street)	ACTT Employment Services EPS Intensive In-Home Outpatient Peer Bridger Supported Employment Community Support Team	Behavioral Health Outpatient Center	Winston Salem	Forsyth	Partners Health Management
Forsyth Psychosocial Rehabilitation	PSR	Community Center	Winston Salem	Forsyth	Partners Health Management
Peniwine Group Home	ICF Day Program	Group Home	Winston Salem	Forsyth	Partners Health Management
Smiley ADC	ESS Supported Living Vocational Community Services Family Living Program	Community Center	Winston Salem	Forsyth	Partners Health Management
Behavioral Health Wake (Dogwood Drive)	Outpatient	Behavioral Health Outpatient Center	Zebulon	Wake	Alliance Health
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Bertie	Bertie	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Gates	Gates	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Hyde	Hyde	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Perquimans	Perquimans	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Tyrrell	Tyrrell	Trillium Health Resources

Monarch Service Locations and Programs Offered

Location	Programs	Location Type	Primary Address: City	County	LME/MCO
Moore County Apartments	ACT, Supported Living	Apartment	Aberdeen	Moore	Sandhills
Administration Annex	ACTT	Local Office	Albemarle	Stanly	Partners Health Management
Andrew Jackson Road Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Bell Main Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Fourth Street Apartments	PRS/ISS Apartments	Personal Residence	Albemarle	Stanly	Partners Health Management
Greenwood ADP Center	Day Program, ICF Day Program, Community Services	Community Center	Albemarle	Stanly	Partners Health Management
Lilliputian Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Pfeiffer MH Administration Office	Intensive Cation, Community Care Behavioral Health Clinic, Employment Services EPS, In-Home Therapy Services, Medical Assisted Treatment, Outpatient, Peer Support	Headquarters	Albemarle	Stanly	Partners Health Management
Allen I Group Home	Day Program, ICF	Group Home	Albemarle	Stanly	Partners Health Management
Allen II Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Almond Street Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Andy Vocational Services	ESS, Vocational	Community Center	Albemarle	Stanly	Partners Health Management
Bethel Group Home	ICF	Group Home	Albemarle	Stanly	Partners Health Management
Bo Di Willie Street Group Home	ICF	Group Home	Angier	Harnett	Sandhills
Arrowville Group Home	ICF	Group Home	Arrowville	Union	Sandhills
Asheboro School Road Group Home	ICF	Group Home	Asheboro	Randolph	Sandhills
Cox Avenue Group Home	ICF	Group Home	Asheboro	Randolph	Sandhills
Fox Chase Group Home	ICF	Group Home	Asheboro	Randolph	Sandhills
Vocational Opportunities in the Community	ESS, Vocational	Community Center	Asheboro	Randolph	Sandhills
The Foundation Association Group Community	Vocational	Community Center	Asheville	Buncombe	Vaya Health
Whisper Shores	ICF	Group Home	Beaufort	Carteret	Trillium Health Resources
Life Agencies Community Living Skills	ESS, Vocational	Community Center	Bessie	Montgomery	Sandhills
Behavioral Health Wake (Belville Avenue)	Outpatient	Behavioral Health Outpatient Center	Cary	Wake	Alliance Health
Behavioral Health Mecklenburg (Executive Center)	ACTT, In-Home therapy Services, Intensive In-Home, Mindfulness, Outpatient, Peer Bridger, Transitional Management Services, Community Support Team	Behavioral Health Outpatient Center	Charlotte	Mecklenburg	Alliance Health
Bear Creek Group Home	ICF	Group Home	Charlotte	Mecklenburg	Alliance Health
Carmel Forest Drive Group Home	ICF	Group Home	Charlotte	Mecklenburg	Alliance Health
Pinkney Road Group Home	ICF	Group Home	Charlotte	Mecklenburg	Alliance Health
Circle North Cross Center	Facility Based Crisis	Crisis Center	Charlotte	Mecklenburg	Alliance Health
Five City Achievement Center (Fayetteville)	ESS, Supported Living, Vocational	Community Center	Elizabeth City	Pasquotank	Trillium Health Resources
Shelter Opportunities Unlimited	ESS Day Program, Vocational	Community Center	Hayden	Wake	Trillium Health Resources
Fernwood Adult Group Home	ICF	Group Home	Fayetteville	Cumberland	Sandhills
Glebe Gardens Apartments	ISH Apartments	Apartment	Fayetteville	NC	Trillium Health Resources
Parkwood Group Home	ICF	Group Home	Forest City	Rutherford	Partners Health Management
The Oaks Group Home	ICF	Group Home	Forest City	Rutherford	Partners Health Management
Trinity Group Home	ICF	Group Home	Forest City	Rutherford	Partners Health Management
Georgetown Group Home	ICF	Group Home	Four Oaks	Johnston	Alliance Health
Behavioral Health Wake (Gold Parkway)	Outpatient	Behavioral Health Outpatient Center	Fuquay Varina	Wake	Alliance Health
Behavioral Health Haldon (Court Drive)	ACTT, Outpatient, Peer Bridger, Community Support Team	Behavioral Health Outpatient Center	Gastonia	Gaston	Partners Health Management
Forest Oaks Apartments	ISH Apartments	Apartment	Gastonia	Gaston	Partners Health Management
Lighthouse Club of Currituck	ESS Vocational	Community Center	Grandy	Currituck	Trillium Health Resources
Pasadena County Group Home	ICF	Group Home	Grantsboro	Pamlico	Trillium Health Resources
Behavioral Health Guilford (Northline Ave)	ACTT, Crisis, Employment Services EPS, Outpatient, TCT	Behavioral Health Outpatient Center	Greensboro	Guilford	Sandhills
Bland Apartments	ISH Apartments, Community Homes	Apartment	Greensboro	Guilford	Sandhills
Charlotte Street Group Home	ICF	Group Home	Hamlet	Richmond	Sandhills
Dockwood Street Group Home	ICF	Group Home	Hamlet	Richmond	Sandhills
Community Rehab Workers	ICF Day Program	Community Center	Hamlet	Richmond	Sandhills
Kingcross Apartments	Apartments ISH	Apartment	Hamlet	Richmond	Sandhills
Carver Street Group Home	ICF	Group Home	High Point	Guilford	Sandhills
Dogwood Circle Group Home	ICF	Group Home	High Point	Guilford	Sandhills
Fairfield Group Home	ICF	Group Home	High Point	Guilford	Sandhills
Old Portage Road	ICF	Group Home	Kernersville	Guilford	Sandhills
Welcome Group Home	ICF, Day Programs	Group Home	King	Stokes	Vaya Health
Behavioral Health Scotland (Mckinnon Lane)	Outpatient	Behavioral Health Outpatient Center	Laurinburg	Scotland	Sandhills
Behavioral Health Davidson (Grimes Blvd)	ACTT Intensive In-Home Outpatient Peer Support	Behavioral Health Outpatient Center	Lexington	Davidson	Sandhills
Barnett Psychosocial Rehabilitation	PSR	Community Center	Lillington	Harnett	Sandhills
Behavioral Health Lincoln (Aiken Street)	Outpatient	Behavioral Health Outpatient Center	Lincolnton	Lincoln	Partners Health Management
Behavioral Health Robeson (Godwin Avenue)	Employment Services EPS Outpatient Community Support Team	Behavioral Health Outpatient Center	Lumberton	Robeson	Cumberlin
Daughtwood Arbor	Facility Based Crisis Mobile Crisis	Crisis Center	Lumberton	Robeson	Easycentle
Beech Club of Dare	Day Program ESS	Community Center	Manteo	Dare	Trillium Health Resources
New Horizon Enterprises	ESS Vocational	Community Center	Mocksville	Davie	Partners Health Management
Campus Park Drive	Day Program ICF Day Program	Community Center	Monroe	Union	Partners Health Management
Cairns Lane Group Home	ICF	Group Home	Monroe	Union	Partners Health Management
Old Monroe Group Home	ICF	Group Home	Monroe	Union	Partners Health Management
Ridgefield Group Home	ICF Day Program	Group Home	Monroe	Union	Partners Health Management
Southgate	ICF	Group Home	Monroe	Union	Partners Health Management
Angel on Vision	ICF Day Program	Community Center	Mount Gilead	Montgomery	Sandhills
Cherokee Group Home	ICF	Group Home	Mount Pleasant	Cabarrus	Partners Health Management
Mt. Gilead Children's Home	ICF	Group Home	Mt. Gilead	Montgomery	Sandhills
Northwood Group Home	Day Programs ICF	Group Home	Mt. Gilead	Montgomery	Sandhills
Brooklyn	ESS	Group Home	Nashville	Nash	Trillium Health Resources
Hicks Creek Road Group Home	ICF Day Program	Group Home	New Bern	Craven	Trillium Health Resources
Dogwood House Group Home	ICF Day Program	Group Home	New Bern	Craven	Trillium Health Resources
Health Drive Center	Day Program ESS Vocational	Community Center	New Bern	Craven	Trillium Health Resources
Hale Street Home	ICF	Group Home	New Bern	Craven	Trillium Health Resources
Kimberly Road Group Home	Day Program ICF	Group Home	New Bern	Craven	Trillium Health Resources
Spencer's Place	ICF	Group Home	New Bern	Craven	Trillium Health Resources
Vineyard Group Home	ICF	Group Home	Newport	Carteret	Trillium Health Resources
Heath Road Group Home	ICF	Group Home	Norwood	Stanly	Partners Health Management
Hoke County #1 Group Home	ICF	Group Home	Raeford	Hoke	Sandhills
Hoke County #2 Group Home	ICF	Group Home	Raeford	Hoke	Sandhills
Vocational Options of Hoke County	ESS Vocational	Community Center	Raeford	Hoke	Sandhills
Behavioral Health Wake (Rawlins Drive)	Employment Services EPS Outpatient	Behavioral Health Outpatient Center	Raleigh	Wake	Alliance Health
Dan Morrison PSR	PSR	Community Center	Raleigh	Wake	Alliance Health
Wilmont Behavioral Health Urgent Care	Behavioral Health Urgent Care	Crisis Center	Raleigh	Wake	Alliance Health
Arden Street Group Home	ICF	Group Home	Robbins	Moore	Sandhills
Middleton Street Group Home	ICF	Group Home	Robbins	Moore	Sandhills
Caroline Drive Group Home	ICF	Group Home	Rockingham	Richmond	Sandhills
Pebble Estate Group Home	Day Programs ICF	Group Home	Rockingham	Richmond	Sandhills
Rebuthur Apartments	Apartments ISH	Apartment	Rockingham	Richmond	Sandhills
Wave Place Group Home	ICF	Group Home	Rockingham	Richmond	Sandhills
Richmond County Apartments	ISH Supported Living	Apartment	Rockingham	Richmond	Sandhills
Richmond Psychosocial Rehabilitation	PSR	Community Center	Rockingham	Richmond	Sandhills
Rockingham Administration	Administration	Local Office	Rockingham	Richmond	Sandhills
Behavioral Health Nash (Tiffany Blvd)	Employment Services EPS Outpatient	Behavioral Health Outpatient Center	Rocky Mount	Nash	Trillium Health Resources
Briarhaven Apartments	Apartments ESS ISH	Apartment	Rocky Mount	Edgecombe	Easycentle
Briarhaven Court	ESS	Group Home	Rocky Mount	Edgecombe	Easycentle
North Hillside Apartments	Apartments ISH	Apartment	Rutherfordton	Rutherford	Partners Health Management
Sanford Psychosocial Rehabilitation	PSR	Community Center	Sanford	Lee	Sandhills
Donald Street	ESS	Group Home	Sanford	Lee	Sandhills
West Blanche Street Group Home	ESS	Group Home	Selma	Johnston	Alliance Health
Behavioral Health Cleveland (West Marion Street)	Employment Services EPS Outpatient	Behavioral Health Outpatient Center	Shelby	Cleveland	Partners Health Management
Buffalo Creek Apartments	Apartments ISH	Apartment	Smithfield	Johnston	Alliance Health
North 7th Street Group Home	ESS	Group Home	Smithfield	Johnston	Alliance Health
Connecticut Avenue Group Home	ESS	Group Home	Southern Pines	Moore	Sandhills
Pinehurst Social Community Center	Day Program ESS Supported Employment Vocational Community Services	Community Center	Southern Pines	Moore	Sandhills
Oak Drive Group Home	ICF	Group Home	Southern Pines	Moore	Sandhills
Pennsylvania Avenue Group Home	ICF	Group Home	Southern Pines	Moore	Sandhills
Stokes County Group Home	ICF	Group Home	Stanleyville	Stokes	Trillium Health Resources
Montgomery Adult Group Home	ICF	Group Home	Troy	Montgomery	Sandhills
New View Apartments	Apartments ESS ISH	Apartment	Tryon	Polk	Vaya Health
Senior Adult Group Home	ICF	Group Home	Shelebourne	Union	Sandhills
Behavioral Health Wake (Hutchinson Avenue)	Outpatient	Behavioral Health Outpatient Center	Wake Forest	Wake	Alliance Health
Wilkes Opportunity Center	ESS Vocational	Community Center	Walnut Cove	Wilkes	Vaya Health
Walnut Cove Apartments	Apartments ESS ISH	Apartment	Walnut Cove	Wilkes	Vaya Health
Caribbean Apartments (Beaufort)	Apartments ISH	Apartment	Washington	Beaufort	Trillium Health Resources
Main Street Group Home	ICF	Group Home	Washington	Beaufort	Trillium Health Resources
Columbus Industries	Day Program ESS Vocational	Community Center	Whiteville	Columbus	Trillium Health Resources
Wise Hanover PSR	PSR	Community Center	Wilmington	Wise Hanover	Trillium Health Resources
Behavioral Health Wilkes (Forest Hills Rd)	Outpatient	Behavioral Health Outpatient Center	Wilkes	Wilkes	Easycentle
Wilmington Group Home	ICF	Group Home	Wingate	Union	Partners Health Management
Behavioral Health Forsyth (Cherry Street)	ACTT Employment Services EPS Intensive In-Home Outpatient Peer Bridger Supported Employment Community Support Team	Behavioral Health Outpatient Center	Winston Salem	Forsyth	Partners Health Management
Forsyth Psychosocial Rehabilitation	PSR	Community Center	Winston Salem	Forsyth	Partners Health Management
Peniwine Group Home	ICF Day Program	Group Home	Winston Salem	Forsyth	Partners Health Management
Smiley ADC	ESS Supported Living Vocational Community Services Family Living Program	Community Center	Winston Salem	Forsyth	Partners Health Management
Behavioral Health Wake (Dogwood Drive)	Outpatient	Behavioral Health Outpatient Center	Zebulon	Wake	Alliance Health
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Bessie	Wake	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Cary	Wake	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Dublin	Bladen	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Fairfield	Hyde	Trillium Health Resources
Mobile Integrated Care Clinic	Outpatient	Mobile Care Vehicle	Northampton	Northampton	Trillium Health Resources

Mission, Vision, Values

OUR MISSION

- Monarch provides hope, promotes wellness, and empowers individuals and families impacted by mental illness, substance use disorders, intellectual and developmental disabilities, and traumatic brain injury.

OUR VISION

- Monarch envisions a world where all people can achieve their unique potential.

OUR VALUES

- **Integrity:** We value ethical and transparent behavior. We believe in honest and open communication that fosters trust and ensures we are accountable to each other and the people we support.
- **Compassion:** We believe in treating all people with basic human kindness, understanding that Monarch is a stronger organization when people are caring and compassionate toward each other.
- **Respect:** We value diversity in all its forms and work to ensure the inclusion of all people. We respect the rights and value the unique contributions of each individual.
- **Excellence:** We are committed to providing exceptional customer service and mission-driven care in a safe, healthy and respectful environment.
- **Courage:** We believe there is strength in having the courage to try and fail and in asking for help when assistance is needed. We value the ownership of mistakes and support the change and growth that can result.
- **Innovation:** We value learning, changing and charting the course for better behavioral health care for all. We commit to guiding operational performance through data driven leadership.

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Document Name	Folder Path
Acquisition Policy	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
Facility and Program Naming Policy	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
Grant Fundraising Policy	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
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Financial Conflict of Interest - Federal Grants	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
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Social Media Policy	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
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Fundraising Revenue Carry-Over Policy	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
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Scope of services-service purpose and eligibility	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
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Volunteer Policy	Documents / Policies, Forms, and SOP's / Administration / Administration Policies
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Board Award Policy	Documents / Policies, Forms, and SOP's / Board / Board Policies
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Board Expenditures policy	Documents / Policies, Forms, and SOP's / Board / Board Policies
Board response to concerns and complaints	Documents / Policies, Forms, and SOP's / Board / Board Policies
Executive compensation policy	Documents / Policies, Forms, and SOP's / Board / Board Policies
Minutes of governing body	Documents / Policies, Forms, and SOP's / Board / Board Policies
Protection of Personal Information Policy	Documents / Policies, Forms, and SOP's / Board / Board Policies
HMIS Confidentiality Policy	Documents / Policies, Forms, and SOP's / Board / Board Policies
HMIS Grievance Policy	Documents / Policies, Forms, and SOP's / Board / Board Policies
System of Care Policy	Documents / Policies, Forms, and SOP's / Care Management / Care Management Policies
HCBS Waiver Care Coordination Requirements Procedure	Documents / Policies, Forms, and SOP's / Care Management / Care Management Policies
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Care Management Crisis Response SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
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Care Management Engagement SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
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Care Management Internal and External Referrals SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Care Management Satisfaction Survey SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Care Management Discharge SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Care Management Transitional Care Management-Diversion-Community Inclusion SOP - DRAFT	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Care Management Education and Communication - Self Management SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Care Management Training Requirements	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Care Management Medication Review and Consultation SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
TCM Transportation SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
TCM On-Call Updates SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Tailored Care Management Disclosure Tracking SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
MS Teams Virtual Meetings SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Tailored Care Management Naming Convention - Attachments	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Tailored Care Management Medisked Coordinate Support Ticket SOP	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
New Document	Documents / Policies, Forms, and SOP's / Care Management / Care Management SOP's
Safety Steering Committee Charter	Documents / Policies, Forms, and SOP's / Culture of Safety / Charter

Document Name	Folder Path
Dietary Policy	Documents / Policies, Forms, and SOP's / Dietary Supports / Dietary Supports Policies
Food Storage and Kitchen Cleanliness Policy	Documents / Policies, Forms, and SOP's / Dietary Supports / Dietary Supports Policies
SOP Digital Thermometers for Refrigerators	Documents / Policies, Forms, and SOP's / Dietary Supports / Dietary Supports SOP's
Emergency Preparedness Plan - site specific	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Environmental Assessment	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Emergency relocation and notification form	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
oxygen cylinder safety	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
NFPA Med Gas Cylinder Storage	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Emergency Operations Plan	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Emergency Closure Procedure	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
ILSM Contractor Checklist Appendix B	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
ILSM Initiation form Appendix C	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
ILSM risk assessment Appendix A	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
ILSM Termination form Appendix D	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Evacuation needs form	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Hot water heater sign	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Bedbug information flyer	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Annual Fire Drill form BH locations	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Fire drill form	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
BH Monthly Equipment checklist	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Blood Borne Pathogens Exposure Control Plan	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Occupational Exposure Control Plan Levels	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Emergency Operations Annex plan	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Emergency Preparedness Plan-General	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Safety Manual 2020	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Facilities Information Form	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Forms & Plans
Facility Management policy	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Environment of Care Program	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Hazardous Materials and Waste Management Plan	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Interim Life Safety Measures policy	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Lockout-tagout policy	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Life Safety Management Plan	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Maintenance of Facility Equipment	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Utilities Management Plan	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Identification badge	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Environment Of Care Safety and Security Plan	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Oxygen Policy	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety Policies
Bed Bug SOP	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety SOP's
SOP Woodworking Equipment	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety SOP's
IT Maintenance and System Changes	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety SOP's
Fire Drill- SOP	Documents / Policies, Forms, and SOP's / Facility Management-Safety / Facility Management-Safety SOP's
Procurement Manual - Monarch.2021	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Monarch Investment and Spending Policy 2021	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Audit Requirements	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Cash Disbursement Policy	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Patient Consent to Treat Disclosure for Billing	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Petty Cash Policy	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Accounts Receivable	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Audit Preparation	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Audit Selection	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Budget	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Capital Purchases	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Cash Management	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Cash Receipts	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Checking Account Signatures	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Financial Reporting	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Fiscal Year Closing	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Fixed Assets	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Fraud	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Front Desk Pay Source Verification	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Liabilities and Indebtedness loans	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Payment for individuals creating art work	Documents / Policies, Forms, and SOP's / Finance / Finance Policies

Document Name	Folder Path
Personal Funds Policy	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Preferred Vendor Policy	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Recording of cash donations	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Sliding fee scale policy	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Travel Expense	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Grant Preparation and Management Policy	Documents / Policies, Forms, and SOP's / Finance / Finance Policies
Drug Screening	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Professional Boundaries	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Staff as Role Model	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Student Self Governance	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Student tuition and payment	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Suicide Risk & Precautions	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Voluntary Work by Students	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Admission Assessment Goodale	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Admission Criteria	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Assessment and Treatment Planning	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Competencies and Supervision	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Discharge Criteria	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Ensuring the Highest Standard of Care	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Qualiity Assurance & Improvement	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Student Rights and Responsibilities	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Suspension and Expulsion	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
Training and Continuing Education	Documents / Policies, Forms, and SOP's / Goodale School / Goodale School Policies
HIPAA Complaints Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
HIPAA Security Policy Handbook	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
HIPAA Summary	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Uses and Disclosures - Authorization Objection Not Required Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Uses and Disclosures - Other Requirements relating to uses and disclosures of PHI Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Uses and Disclosures - Valid Authorization and Required Authorization Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Uses and Disclosures of PHI Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Uses and Disclosures-General Rules Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Access of Individuals to PHI	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Notice of Privacy Practice Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Accounting of Disclosures of PHI Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Administrative Requirements Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Breach of PHI Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Business Associates Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Right to Request Privacy Protection	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Uses and Disclosures - Agree or Object	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Amendment of PHI Policy	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
Designated Records Set Policy 2021	Documents / Policies, Forms, and SOP's / HIPAA / HIPAA Policies
2023 Employee Handbook	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Clinical Supervision and Administrative Supervision of Clinical staff	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Competency Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Maintenance of Licensure and Continuing Educational Units Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Credentialing Policy for Licensed Staff	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Employee Visitor Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Employment during COVID-19 Policy Non-CMS	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
PRN Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Staffing Requirements	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Employment during COVID-19 Policy CMS	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Independent Contractors Consultants	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Staff Credentialing	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Supervision of Associate and Para-Professional Staff	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Training Plan	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Site requirements for first aid-cpr-and other red cross training	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Associate Level Therapist Clinical Supervision and Reimbursement	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Training Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Telework (Work From Home) Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Emotional Support Animal Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Tobacco-free Policy	Documents / Policies, Forms, and SOP's / Human Resource / HR Policies
Instructions for completing Infection Control Risk Assessment	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control Plans & Documents

Document Name	Folder Path
2023 INFECTION PREVENTION AND CONTROL PLAN	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control Plans & Documents
Standard Precautions policy	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control Policies
COVID-19 Vaccination Policy	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control Policies
Communicable diseases Policy	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control Policies
Flu Vaccine	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control Policies
Hand Hygiene policy	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control Policies
Cleaning supplies SOP	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control SOP's
MRSA SOP	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control SOP's
OSHA Hazard Communication Standards-Safety Data Sheets SOP	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control SOP's
Confirmed Infections-Credible	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control SOP's
Immunizations-Credible	Documents / Policies, Forms, and SOP's / Infection Control / Infection Control SOP's
Admission Assessment	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Discharge and Transfer Policy	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Discharge Procedures FBC	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Storage of Client Belongings Crisis Programs	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Risk Assessment-Harm to self or others	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Comprehensive Clinical Assessment	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Drug Screening Policy GLH	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Emergency Admission	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Inter-Agency Transfers	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
LTSS Referral, Waiting List and Vacancy Notification	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Multidisciplinary Evaluations	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Pre-admission Medical Examination	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Monarch Standard Denial of Services Letter-LTSS	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
BH Referral Policy	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Outpatient Intake	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Appointment Confirmation Policy	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Consent to Treat Policy	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Intake, Admission, and Discharge Policies
Clinical Coverage-Service Definitions Policy	Documents / Policies, Forms, and SOP's / Intake, Admission, and Discharge / Service Definitions
Medication Checklist-Vivitrol	Documents / Policies, Forms, and SOP's / Medical Service and Supports / High Risk Medications
Vivitrol STAFF COMPETENCIES	Documents / Policies, Forms, and SOP's / Medical Service and Supports / High Risk Medications
Medication Checklist-Clozapine DRAFT 7.19.2021	Documents / Policies, Forms, and SOP's / Medical Service and Supports / High Risk Medications
Medication Checklist-Long Acting Injectables	Documents / Policies, Forms, and SOP's / Medical Service and Supports / High Risk Medications
Work instructions for providers - ordering injections	Documents / Policies, Forms, and SOP's / Medical Service and Supports / High Risk Medications
High Alert Medication Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medication Administration policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medication Management Program	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medication Refill	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
NC Controlled Substance reporting system	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Prescribers Order Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Venous Blood Drawing Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
AED Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Dispensing and Labeling of Meds	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Emergency Medications Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
HIV-AIDS	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
ICF data-menses-weight-ht-sleep	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Lab Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Look Alike Sound Alike Medication	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Med Admin LTSS Electronic MAR	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medication Disposal Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medication Education	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medication Orders	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medication Reconciliation Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Medications Brought into the Facility	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Metabolic Monitoring Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Monitoring Psychotropic Medication	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Obtaining Prescribed Medication	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Pharmacy Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Prescribing Controlled Medications to Adults Policy	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Process for Re-Called or Discontinued Medications	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Responding to Adverse Medications	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Routine and Preventative Medical Supports	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies

Document Name	Folder Path
Self Administration of Medications	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Storage of Medications	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Therapeutic leave	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Vital Signs	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Monitoring Effects of Medication	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports Policies
Insulin Injection SOP	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports SOP's
electronic labs - SOP	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports SOP's
Lab orders SOP paper	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports SOP's
ordering labs POC	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports SOP's
Medication Room Audit policyF	Documents / Policies, Forms, and SOP's / Medical Service and Supports / Medical Service and Supports SOP's
DOC Monarch PI Plan 21-22 Final Approved	Documents / Policies, Forms, and SOP's / Performance Improvement / Performance Improvement Plan
DOC QIP Summary FY 20-21 Final	Documents / Policies, Forms, and SOP's / Performance Improvement / Performance Improvement Plan
Performance Improvement Activities	Documents / Policies, Forms, and SOP's / Performance Improvement / Performance Improvement Policies
Continuous Quality Improvement Policy	Documents / Policies, Forms, and SOP's / Performance Improvement / Performance Improvement Policies
Performance Improvement Program	Documents / Policies, Forms, and SOP's / Performance Improvement / Performance Improvement Policies
Performance Health - How to Report an Incident Guide	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM SOP's
Performance Health - Incident Reporting Supervisor Training - Back Office - Monarch	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM SOP's
MAD Categories and Sub Categories	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM SOP's
MAD (Monitoring Audit Database) SOP	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM SOP's
SOP Surveys and POC	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM SOP's
SOP - Internal Auditing of Records	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM SOP's
Satisfaction Survey Policy	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM/Regulatory Requirements Policies
Complaint--Grievances	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM/Regulatory Requirements Policies
Complaints-Online Reputation Policy	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM/Regulatory Requirements Policies
Level I Minor Incident Report Policy	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM/Regulatory Requirements Policies
Critical incident reporting policy	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM/Regulatory Requirements Policies
Investigations policy	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM/Regulatory Requirements Policies
Peer Review	Documents / Policies, Forms, and SOP's / QM/Regulatory Requirements / QM/Regulatory Requirements Policies
Consent by Minors. Summary	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Electronic Health Records	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Litigation Hold	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Treatment of Minors Without Parental Consent	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Fees for the Reproduction of Records Policy	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Responding to Court Orders or Subpoenas Policy	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
General Record Requirements	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Assurance of confidentiality	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Consent for observation taping, or photographing individuals receiving services	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Documentation of services	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Imaging Policy	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Medical necessity and Service Orders	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Ownership - Transfer of Records Policy	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Protecting and Safeguarding confidential information in paper	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Record Retention and Disposition	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Release of Confidential Information with or without Consent	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality Policies
Storage Training	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality SOP's
SOP to schedule ROI to Medical Records in CREDIBLE	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality SOP's
SOP- Record Transfer Tracking	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality SOP's
Record Storage and Destruction SOP	Documents / Policies, Forms, and SOP's / Records and Confidentiality / Records and Confidentiality SOP's
Abuse Neglect and Exploitation	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Human Rights Committee	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Administration of Emergency Medications	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Advance Directives Policy	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Appeal process for waiver services	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Approved Interventions	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Do Not Resuscitate Policy	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Informing people served of their rights	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Interpreter Services	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Least Restrictive Alternatives	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Magistrate Procedure	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Natural Supports	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Prohibited Procedures	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Protective Devices	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies

Document Name	Folder Path
Restricting Rights	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Restrictive Interventions	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Search and Seizure - BH Crisis Centers	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Search and Seizure	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Sexuality	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Suspension-Expulsion from services	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Voting Rights for People with Disabilities	Documents / Policies, Forms, and SOP's / Rights Protection and Promotion / Rights Protection and Promotion Policies
Company owned vehicles assigned to employees under the Commuting Rule	Documents / Policies, Forms, and SOP's / Transportation / Transportation Policies
Vehicle Commuter Policy	Documents / Policies, Forms, and SOP's / Transportation / Transportation Policies
Transportation policy	Documents / Policies, Forms, and SOP's / Transportation / Transportation Policies
Vehicle Accident Emergency	Documents / Policies, Forms, and SOP's / Transportation / Transportation Policies
Vehicle Maintenance Policy	Documents / Policies, Forms, and SOP's / Transportation / Transportation Policies
Assessments required by service	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Authorization Guidelines per Payor Source	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
EM Established Note SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Consent to Treat addendum SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
AED SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Call center representative-911 calls SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Call Center SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
CCNC Process	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
common side effects of injections	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Customer Service Expectations	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
EMAR Vehicle Administered Injection Process for Nursing	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Epi pen SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Final Critical Lab Protocol	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Final Lab Ordering Process SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Injection Process SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
MDE SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Narcan SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
PAP SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Pharma SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Prior Authorization SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
PHQ9 SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Credible Client Portal SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Evidence Based Practice Training SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Patient Ping SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Sample Medication SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
PHQ-9 Monitoring in Outpatient Behavioral Health	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Credible Updating Demographics	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Credible Emergent Risk Assessment	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Credible Discharge SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Point of Care (POC) Labs SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
eLabs SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Nutritional Screening SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Virtual Open Access SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Relatient On Demand Communication Letterss	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
NCTOPPS	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Outpatient Commitment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Managing Refill Requests	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Registration Coordinator Performance Measures SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
BH Scheduler Dashboard User Guide	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Just in Time SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Internal Chart Audit SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Provider.Clinician Change Request	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Credible Communication Documentation	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
IDD Bridge Services SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Infinia COS Referral System	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Scheduling Expectations	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Scheduling On Site Resources-Offices	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
GAD 7 SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
AUDIT-C	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
CAGE AID SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's

Document Name	Folder Path
Monarch Referral Form	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Check in Check out Service	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Clozapine Therapy SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
DRUG SCREEN PROCEDURE	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
Measurement-Based Care	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
BH Mobile Clinic Process SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's
BHUC Credible Process Maps	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / BHUC
BHUC Process	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / BHUC
CCBHC Training SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC
Stanly CCBHC Intake SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC
CCBHC Mobile Crisis from Daymark Entered in Credible SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC
GPRA Service SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC
CCBHC Mobile Crisis from Daymark Entered in Credible	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC
Care Manager Orientation Checklist	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
Monarch Fax Revised Cover Sheet to obtain PHI without consent	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Huddle SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Discharge Process SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Case Conference SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Engagement Process SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management How to Document Unsuccessful Contacts (No Shows)	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Internal Referral SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Medical Records Request	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Process Checklist	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Risk Stratification Tool SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Management Service Note protocol	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC Care Manager Crisis Protocol	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC NC PCP Revision SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
CCBHC NC PCP Initial SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / CCBHC Care Management
MAT Critical Lab Info Protocol	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / MAT
CCBHC NOMS How to Complete in Credible Child SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / NOMS
CCBHC NOMS How to Complete in Credible Adult SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / NOMS
CCBHC NOMS Requirements (overview)	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / NOMS
CCBHC SPARS Data Entry SOP (NOMS)	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / NOMS
CCBHC NOMS How to Complete a Discharge Service in Credible SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / CCBHC / NOMS
ACTT Inpatient Treatment and Incarceration SOP- Rev 3-2021	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Intensive In Home Authorization Pilot - Cardinal Innovations SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
SOP-ACTT Crisis Response	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
SOP-ACTT Daily Team Meeting	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
SOP-ACTT Individual Treatment Team	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
SOP-ACTT Inpatient Treatment and Incarceration	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
SOP-ACTT Referral Process	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
ACTT Assessment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
ACTT Credible Reports SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
ACTT Discharge WorkFlow	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
ACTT Incoming Referrals WorkFlow (Credible)	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
ACTT Injection SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
ACTT Internal transfer SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
ACTT Prescriber scheduling SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Career Profile SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Child & Family Team Meeting SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Employer Contact SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Enhanced Services Inpatient Treatment and Incarceration SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
In or At Risk SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Intensive In-Home Process Instructions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
IPS Credible Process	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
IPS Progress Note SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Job Disclosure SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Job Start Job Stop SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
CANS Assessment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Ongoing ACTT services Workflow (Credible)	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
PSR Daily Note SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
PSR NB Weekly Summary Note SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services

Document Name	Folder Path
PSR Process Instructions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
PSR Workflow SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Signing Service Orders Enhanced Services Providers	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Credible Attaching, Scanning and Uploading SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Credible Team Enrollment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Internal Referral SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Credible Registration-Enhanced Services	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
Enhanced Services Referrals SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
WRAP SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Enhanced Services
FBC Provider Work Instructions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
Outpatient-FBC Credible Service Order SOP Training Material	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
Outpatient-FBC Standalone Service Order SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
Child FBC Building Access.doc	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
Child FBC Search SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
Child FBC--Voluntary Admission Process	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
FBC Admission Adult SOP FINAL	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
FBC Pain SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
Medical Clearance SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
PINPOINT process	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
MAT-confirmation POCC MAKO Lab	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
FBC IVC Admission Note Work Instructions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
FBC Work Process Instructions Detailed	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / FBC
MAT SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / MAT
HOW TO REVIEW REFILL REQUESTS IN CREDIBLE FOR PROVIDERS	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
MAT SUB Enrollment Form SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Outpatient Credible Treatment Plan SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Psych Eval Instructions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Risk Assessment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Open Access SOP Triage info	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
EM Established Note SOP Outpatient	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
After Visit Summary Printing to Site SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Care Coordination Form Work Instructions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
CCA SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
EM Established Work Instructions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Group Therapy Workflows	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Injection Administration Work Instructions for Providers	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Pharmaceutical Sales Rep SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Writing Non-Billable Progress Note SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Internal Referral SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
MCO Enrollment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Collecting Payment	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Relatient Appointment Reminder System	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Schedule Templates SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible OP Role Assignments	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Wait list	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Managing No Shows Procedures	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Microsoft Teams for Outpatient SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Insurance Verification	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Doxy.me	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Depression Clinical Pathway-Outpatient levels of care	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Doxy.me Electronic Signature for Documents	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Approving Services in Credible	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Clinic Emergency Procedure	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Letters	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Hospitalization Discharge Tracker	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Creating and Viewing Credible Contact Logs	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Opening or Reactivating a Chart	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Outpatient Service Order and Treatment Plan Signature SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Credible Scheduling Appointments	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Secondary Employee Scheduling - Hosp Discharge	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Individual and Group Therapy Internal Referral	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Monarch Concierge System	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient

Document Name	Folder Path
Real Time Check Out via Doxy.Me SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
SDOH assessment and referral Outpatient Therapy	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
SDOH assessment and referral Psychiatric Services	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Slot Scheduler - Alpha MCS System SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Assertive Engagement SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Outpatient Therapy PIE note	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Outpatient Registration SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Accessing Interpreter Services SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Optum Presciption SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Monarch Assessment Portal/Web Assessment	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Nursing Check-In SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Quartet Referral Process SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
New Therapist Productivity Ramp Up Targets	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
Benefit Summary Form SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / Outpatient
SAIOP Standard Operation Policy SOP and work flow	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SAIOP
Guide To Online Authorization Requests	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
SECU Medication Returns SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
Process Flow for Client Auth Alpha System	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
Process Flow for Submitting Documentation for Auth	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
Admissions, FBC, SECU	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
SECU Benefits Verification SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
Hospital Information Form- SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
SECU Shoe Policy SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
COTA FBC RI SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
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COTA FBC Individual Treatment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
COTA FBC Group Treatment SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
COTA FBC Group Screen SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Behavioral Health SOP's / SECU
LTSS Required Assessment by Service Type	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
LTSS Residential Vacancy Notification and Intake Timeline SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
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Bed Board	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
Client page overview	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
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Hospitalization follow-up documentation	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
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Fall Prevention and Response	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
LTSS Internal Transfers	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's

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LTSS SOP - CLFS 5 Residential	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
LTSS SOP - Entering height and weight	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
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LTSS SOP - PCP - Revision of a plan	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
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LTSS SOP - PCP service type definitions	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
LTSS SOP - QP PIE Note	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
Investigation Process Incidents (Levels 2 and 3)	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
LTSS SOP - Medical progress note SOP	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / LTSS SOP's
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Child FBC Educational Services	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Day pass policy for FBCs	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Diagnostic Coding and Reporting	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Elopement Precautions Policy	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
FBC Breathalyzer Use and Maintenance	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Levels of Observation	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Medication Assisted Treatment	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
No Show/No Call	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Person Centered Planning	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
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TB Screening	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
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HIV Referrals	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
ICF active treatment, admission, discharge, individual program plan	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Individual Choice	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Managing those who are intoxicated	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Pregnant Women-IV Drug Users	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Service-Support Animals	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Supervision of People We Support/Alone Time	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Voluntary non compensated work	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
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Involuntary Commitment Policy	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Virtual Services Policy	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Communication Policy	Documents / Policies, Forms, and SOP's / Treatment and Habilitation Services / Treatment and Habilitation Services Policies
Waived Testing – SARS-CoV-2	Documents / Policies, Forms, and SOP's / Waived Testing / Waived Testing Policies
Waived Testing - Glucometer Testing	Documents / Policies, Forms, and SOP's / Waived Testing / Waived Testing Policies
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Waived Testing Policy	Documents / Policies, Forms, and SOP's / Waived Testing / Waived Testing Policies
Waived Testing Urine Drug Screens policy	Documents / Policies, Forms, and SOP's / Waived Testing / Waived Testing Policies
Accutrend Metabolic Monitoring Point of Care Testing	Documents / Policies, Forms, and SOP's / Waived Testing / Waived Testing SOP's

MONARCH

FINANCIAL STATEMENTS
AND SUPPLEMENTARY INFORMATION

June 30, 2022 and 2021

(With Independent Auditors' Reports Thereon)



MONARCH

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June 30, 2022 and 2021

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Independent Auditors' Report on the Financial Statements

The Board of Directors
Monarch:

Report on the Audit of the Financial Statements

Opinion

We have audited the accompanying financial statements of Monarch (a nonprofit organization), which comprise the statements of financial position as of June 30, 2022 and 2021, and the related statements of operations and change in net assets, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Monarch as of June 30, 2022 and 2021, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Monarch and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Monarch's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Monarch's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Monarch's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The combining schedule of financial position and combining schedule of operations and change in net assets are presented for purposes of additional analysis and are not a required part of the financial statements. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated October 20, 2022 on our consideration of Monarch's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Monarch's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Monarch's internal control over financial reporting and compliance

Davidson, Holland, Whitesell & Co., PLLC

Hickory, North Carolina
October 20, 2022

MONARCH

Statements of Financial Position

June 30, 2022 and 2021

Assets

	2022	2021
Current assets:		
Cash and cash equivalents	$ 16,788,490	19,487,068
Residents' cash	279,986	505,988
Accounts receivable, net of allowance for doubtful accounts of $2,190,000 in 2022 and $1,822,000 in 2021	5,687,056	4,522,435
Prepaid expenses	997,777	507,231
Total current assets	23,753,309	25,022,722
Property and equipment:		
Land and land improvements	580,566	538,906
Buildings and improvements	10,282,522	9,923,404
Equipment	5,183,588	5,164,853
Furniture and fixtures	731,790	731,790
Vehicles	6,174,058	5,287,301
	22,952,524	21,646,254
Less accumulated depreciation	14,282,882	13,439,299
Net property and equipment	8,669,642	8,206,955
Other assets:		
Cash value of life insurance	201,404	253,999
Investments	3,462,305	4,052,675
Total other assets	3,663,709	4,306,674
	$ 36,086,660	37,536,351

See accompanying notes to financial statements.

Liabilities and Net Assets

	2022	2021
Current liabilities:		
Refundable advance	$ -	10,000,000
Current installments of long-term debt	525,827	718,745
Current installments of capital lease obligations	46,613	90,473
Accounts payable and accrued expenses	7,494,266	6,763,439
Residents' cash liability	279,986	505,988
Deferred revenue	1,119,722	1,359,411
Total current liabilities	9,466,414	19,438,056
Long-term liabilities:		
Long-term debt	2,113,050	2,310,991
Capital lease obligations	1,479	46,315
Total long-term liabilities	2,114,529	2,357,306
Total liabilities	11,580,943	21,795,362
Net assets without donor restrictions	24,505,717	15,740,989
	$ 36,086,660	37,536,351

MONARCH

Statement of Operations and Change in Net Assets

Year Ended June 30, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Revenue, gains (losses), and other support:			
Sales - merchandise and service	$ 18,987	-	18,987
Less: Cost of materials and supplies	6,231	-	6,231
Less: Cost of labor	8,975	-	8,975
Gross profit	3,781	-	3,781
Grants and service contracts	82,379,387	-	82,379,387
Service fees	4,822,310	-	4,822,310
Contributions and local support	640,086	-	640,086
Other revenue	6,257,446	-	6,257,446
Grant - PPP loan	10,000,000	-	10,000,000
Interest and dividends	75,409	-	75,409
Realized and unrealized losses on investments	(707,245)	-	(707,245)
Gain on disposal of property and equipment	192,198	-	192,198
Total revenue, gains, and other support	103,663,372	-	103,663,372
Expenses:			
Program services:			
Residential services	30,011,235	-	30,011,235
Vocational services	7,999,131	-	7,999,131
Outpatient community support	40,727,551	-	40,727,551
Supporting services:			
Administration and general	16,148,101	-	16,148,101
Fundraising	12,626	-	12,626
Total expenses	94,898,644	-	94,898,644
Change in net assets	8,764,728	-	8,764,728
Net assets at beginning of year	15,740,989	-	15,740,989
Net assets at end of year	$ 24,505,717	-	24,505,717

See accompanying notes to financial statements.

MONARCH

Statement of Operations and Change in Net Assets

Year Ended June 30, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
Revenue, gains, and other support:			
Sales - merchandise and service	$ 14,143	-	14,143
Less: Cost of materials and supplies	2,680	-	2,680
Less: Cost of labor	7,005	-	7,005
Gross profit	4,458	-	4,458
Grants and service contracts	81,572,729	-	81,572,729
Service fees	5,140,669	-	5,140,669
Contributions and local support	545,888	-	545,888
Other revenue	4,808,649	-	4,808,649
Interest and dividends	69,965	-	69,965
Realized and unrealized gains on investments	770,718	-	770,718
Gain on disposal of property and equipment	34,437	-	34,437
Total revenue, gains, and other support	92,947,513	-	92,947,513
Expenses:			
Program services:			
Residential services	28,883,040	-	28,883,040
Vocational services	7,863,506	-	7,863,506
Outpatient community support	39,400,349	-	39,400,349
Supporting services:			
Administration and general	13,224,183	-	13,224,183
Fundraising	12,597	-	12,597
Total expenses	89,383,675	-	89,383,675
Change in net assets	3,563,838	-	3,563,838
Net assets at beginning of year	12,177,151	-	12,177,151
Net assets at end of year	$ 15,740,989	-	15,740,989

See accompanying notes to financial statements.

MONARCH

Statement of Functional Expenses

Year Ended June 30, 2022

	Program Services				Supporting Services			
	Residential Services	Vocational Services	Outpatient Community Support	Sub-Total Program Services	Administration and General	Fundraising	Sub-Total Supporting Services	Total
Expenses:								
Personnel costs	$ 23,981,810	6,192,649	32,426,229	62,600,688	10,504,453	-	10,504,453	73,105,141
Food and provisions	775,031	11,931	263,868	1,050,830	16,889	-	16,889	1,067,719
Supplies	274,622	54,695	386,684	716,001	1,177,510	-	1,177,510	1,893,511
Client recreation	16,409	25	22,443	38,877	-	-	-	38,877
Medical services and supplies	122,775	9,801	85,964	218,540	2,851	-	2,851	221,391
Telephone	276,376	72,855	448,517	797,748	276,595	-	276,595	1,074,343
Office supplies and postage	18,473	6,400	44,455	69,328	73,368	-	73,368	142,696
Contract services	617,530	444,988	2,351,309	3,413,827	1,599,777	-	1,599,777	5,013,604
Miscellaneous expense	79,863	20,013	144,318	244,194	473,802	-	473,802	717,996
Bad debt expense	143,297	62,826	1,376,499	1,582,622	-	-	-	1,582,622
Medicaid assessment	713,807	-	-	713,807	-	-	-	713,807
Tax and license fees	35,574	4,298	50,271	90,143	4,965	-	4,965	95,108
Plant and operation	1,426,234	516,049	810,799	2,753,082	1,462,514	-	1,462,514	4,215,596
Depreciation and amortization	301,310	118,374	369,124	788,808	364,322	-	364,322	1,153,130
Building and equipment rent	1,204,971	476,108	1,892,869	3,573,948	177,801	-	177,801	3,751,749
Interest expense	23,153	8,119	54,202	85,474	13,254	-	13,254	98,728
Fundraising expenses	-	-	-	-	-	12,626	12,626	12,626
Total expenses	$ 30,011,235	7,999,131	40,727,551	78,737,917	16,148,101	12,626	16,160,727	94,898,644

See accompanying notes to financial statements.

MONARCH

Statement of Functional Expenses

Year Ended June 30, 2021

	Program Services				Supporting Services			
	Residential Services	Vocational Services	Outpatient Community Support	Sub-Total Program Services	Administration and General	Fundraising	Sub-Total Supporting Services	Total
Expenses:								
Personnel costs	$ 23,145,018	6,148,275	31,695,398	60,988,691	8,877,734	-	8,877,734	69,866,425
Food and provisions	708,559	9,280	235,945	953,784	4,225	-	4,225	958,009
Supplies	314,278	54,868	460,309	829,455	668,129	-	668,129	1,497,584
Client recreation	16,819	-	4,496	21,315	-	-	-	21,315
Medical services and supplies	121,181	6,739	95,115	223,035	2,480	-	2,480	225,515
Telephone	291,060	91,336	381,541	763,937	296,547	-	296,547	1,060,484
Office supplies and postage	18,593	5,556	42,921	67,070	64,022	-	64,022	131,092
Contract services	594,876	256,585	2,561,818	3,413,279	963,840	-	963,840	4,377,119
Miscellaneous expense	102,153	16,273	114,498	232,924	302,916	-	302,916	535,840
Bad debt expense	229,784	97,548	1,027,960	1,355,292	-	-	-	1,355,292
Medicaid assessment	651,871	-	-	651,871	-	-	-	651,871
Tax and license fees	35,165	5,761	34,020	74,946	22,987	-	22,987	97,933
Plant and operation	1,117,123	497,447	825,617	2,440,187	1,385,621	-	1,385,621	3,825,808
Depreciation and amortization	293,679	135,381	319,206	748,266	429,854	-	429,854	1,178,120
Building and equipment rent	1,212,280	528,183	1,538,873	3,279,336	179,303	-	179,303	3,458,639
Interest expense	30,601	10,274	62,632	103,507	26,525	-	26,525	130,032
Fundraising expenses	-	-	-	-	-	12,597	12,597	12,597
Total expenses	$ 28,883,040	7,863,506	39,400,349	76,146,895	13,224,183	12,597	13,236,780	89,383,675

See accompanying notes to financial statements.

MONARCH

Statements of Cash Flows

Years Ended June 30, 2022 and 2021

		2022	2021
Cash flows from operating activities:			
Cash received from residents and contributors	$	92,727,593	91,414,169
Cash paid to suppliers and employees		(93,643,646)	(87,603,258)
Investment income		75,409	69,965
Interest paid		(98,728)	(130,032)
Net cash provided (used) by operating activities		(939,372)	3,750,844
Cash flows from investing activities:			
Proceeds from sale of investments		1,887,245	2,201,953
Purchase of investments		(2,004,120)	(2,302,434)
Purchase of property and equipment		(1,251,836)	(832,263)
Proceeds from sale of property and equipment		302,032	41,003
Net cash used by investing activities		(1,066,679)	(891,741)
Cash flows from financing activities:			
Proceeds from issuance of long-term debt		-	725,912
Principal payments of long-term debt		(829,833)	(877,615)
Principal payments of capital lease obligations		(88,696)	(154,897)
Net cash used by financing activities		(918,529)	(306,600)
Net increase (decrease) in cash, restricted cash and cash equivalents		(2,924,580)	2,552,503
Cash, restricted cash and cash equivalents at the beginning of the year		19,993,056	17,440,553
Cash, restricted cash and cash equivalents at the end of the year	$	17,068,476	19,993,056

The following table provides a reconciliation of cash, restricted cash and cash equivalents reported with the statements of financial position that sum to the total of the same such amounts shown in the statements of cash flows above:

Cash and cash equivalents	$	16,788,490	19,487,068
Residents' cash		279,986	505,988
	$	17,068,476	19,993,056

See accompanying notes to financial statements.

MONARCH

Statements of Cash Flows, Continued

		2022	2021
Reconciliation of change in net assets to net cash provided (used) by operating activities:			
Change in net assets	$	8,764,728	3,563,838
Adjustments to reconcile change in net assets to net cash provided (used) by operating activities:			
Depreciation and amortization		1,153,130	1,178,149
Net realized and unrealized (gains) losses from investments		707,245	(770,718)
Gain on disposal of property and equipment		(192,198)	(34,466)
Increase in accounts receivable		(1,164,621)	(951,944)
(Increase) decrease in prepaid expenses		(525,387)	47,408
(Increase) decrease in cash surrender value of life insurance		52,595	(46,577)
Decrease in refundable advance		(10,000,000)	-
Increase in accounts payable and accrued expenses		730,827	1,227,922
Increase (decrease) in residents' cash liability		(226,002)	284,035
Decrease in deferred revenue		(239,689)	(746,803)
Net adjustments		(9,704,100)	187,006
Net cash provided (used) by operating activities	$	(939,372)	3,750,844
Supplemental schedule of noncash investing and financing activities:			
Acquisition of property and equipment through issuance of long-term debt	$	438,974	-

(1) Operations and Summary of Significant Accounting Policies

(a) Operations

Monarch ("Organization") is a nonprofit organization supporting people with intellectual and developmental disabilities, mental illness, substance use disorder issues, and traumatic brain injuries throughout North Carolina. The Organization's administrative offices are in Albemarle, North Carolina.

(b) Basis of Presentation

The financial statements are presented under accounting principles generally accepted in the United States of America. Under those principles, the Organization is required to report information regarding its financial position and activities according to two classes of net assets: net assets without donor restrictions and net assets with donor restrictions. In addition, the Organization is required to present a statement of cash flows. The Organization uses the accrual method of accounting. Under this basis, revenue is recognized when earned and expenses are recognized when incurred.

(c) Cash, restricted cash and cash equivalents

For purposes of reporting cash flows, cash, restricted cash and cash equivalents include cash on hand, cash in banks, and highly liquid investments with an original maturity date of three months or less and residents' cash.

The Organization maintains its cash in bank deposit accounts which, at times, may exceed federally insured limits. The Organization has not experienced any losses in such accounts. The Organization believes it is not exposed to any significant credit risk on cash and cash equivalents.

(1) Operations and Summary of Significant Accounting Policies, Continued

(d) Revenue and Accounts Receivable

The Organization provides services to individuals under the North Carolina Medicaid Program with funding being passed through Local Management Entities/Managed Care Organizations ("LME/MCOs") which are agencies of the North Carolina Department of Health and Human Services and Medicaid Prepaid Health Plans ("Standard Plan") through contract insurance carriers with North Carolina. LME/MCOs were created by legislation in 2011 to serve Medicaid, uninsured, and underinsured individuals with mental illness, intellectual and developmental disabilities, and substance use disorders. Currently, there are six LME/MCOs operating under the North Carolina 1915(b)(c) Medicaid waiver. The Organization receives a significant amount of revenue under contractual arrangements with LME/MCOs. Revenue is recognized for individuals authorized by the LME/MCOs as fee for service revenue as services are performed and room and board is provided.

Revenue received from Managed Care Organizations and the State of North Carolina may be subject to post-payment review and retroactive adjustment by the payers. The Organization provides estimates for potential adjustments when it is likely that an assessment based on such adjustments will be made against the Organization. Adjustments that are significantly different from the applicable estimates are reflected as an increase or decrease in revenues in the year the adjustments are finalized. Management does not believe that it is likely that adjustments will be made to revenue received during the years ended June 30, 2022 and 2021, and therefore no estimate for potential adjustments or assessments is necessary as of June 30, 2022 and 2021.

Revenues are recognized as services are provided to consumers in an amount that reflects the consideration the Organization expects to be entitled to in exchange for those services and a related receivable is recorded. Management evaluates receivable balances periodically. Based upon these reviews, management will establish an allowance for uncollectible accounts or will write-off specific amounts if deemed uncollectible. In this review, management considers historical losses, results of any ongoing collection efforts, and any other relevant information available. Substantially all of the Organization's revenue was derived from performance obligations satisfied at a point in time for 2022 and 2021.

Credit risk for accounts receivable are concentrated because substantially all of the balances are receivable from the North Carolina Medicaid Program and agencies of the North Carolina Department of Health and Human Services.

(1) Operations and Summary of Significant Accounting Policies, Continued

(e) Investments

The Organization records its investments under the provisions of accounting principles generally accepted in the United States of America. In accordance with those standards, the Organization has characterized its investments in securities, based on the priority of the inputs used to value the investments, into a three-level fair value hierarchy. The fair value hierarchy gives the highest priority to quoted prices in active markets for identical assets or liabilities (Level 1), and the lowest priority to unobservable inputs (Level 3). If the inputs used to measure the investments fall within different levels of the hierarchy, the categorization is based on the lowest level input that is significant to the fair value measurement of the investment.

Investments recorded in the statement of financial position are categorized based on the inputs to valuation techniques as follows:

Level 1 - These are investments where values are based on unadjusted quoted prices for identical assets in an active market the Organization has the ability to access.

Level 2 - These are investments where values are based on quoted prices in markets that are not active or model inputs that are observable either directly or indirectly for substantially the full term of the investments.

Level 3 - These are investments where values are based on prices or valuation techniques that require inputs that are both unobservable and significant to the overall fair value measurement. These inputs reflect assumptions of management about assumptions market participants would use in pricing the investments.

(f) Property and Equipment

Property and equipment is recorded at cost if purchased. Donated property and equipment is recorded at estimated market value, if determinable, as of the date received. Depreciation of property and equipment is computed by the straight-line method over the estimated useful lives of the respective assets. The Organization capitalizes property and equipment if its value is greater than $5,000 and its useful life is more than one year. Estimated useful lives range from 15 years on land improvements, 5 to 40 years on buildings and improvements, 3 to 20 years on equipment, 7 to 20 years on furniture and fixtures, and 4 to 5 years on vehicles.

(1) Operations and Summary of Significant Accounting Policies, Continued

(g) Contributions

In accordance with accounting principles generally accepted in the United States of America, contributions received are recorded as support without donor restrictions or support with donor restrictions, depending on the existence and nature of any donor restrictions.

Grants and other contributions of cash and other assets are reported as support with donor restrictions if they are received with donor stipulations that limit the use of the donated assets. When a donor restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of operations and change in net assets as net assets released from restrictions. Contributions that are restricted by the donor and whose restrictions expire in the fiscal year in which the contributions are recognized are reported as net assets without donor restrictions.

Contributions of donated non-cash assets are recorded at their fair values in the period received. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation, are recorded at their fair values in the period received.

(h) Accounting Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent liabilities at the date of the financial statements and revenue and expenses during the periods reported. Estimates are used when accounting for allowance for doubtful accounts receivable, depreciation, and contingencies, among others. Actual results could differ from these estimates.

(i) Advertising

Advertising costs are charged to operations when incurred. Advertising expense was $189,489 and $82,226 for the years ended June 30, 2022 and 2021, respectively.

(1) Operations and Summary of Significant Accounting Policies, Continued

(j) Tax-exempt Status

The Organization is exempt from income taxes under Section 501 of the Internal Revenue Code as an organization described in Section 501(c)(3). Accordingly, no provision for Federal or state income taxes has been made in the accompanying financial statements. The Organization is not classified as a private foundation.

The Organization has implemented the accounting requirements associated with uncertainty in income taxes using the provisions of Financial Accounting Standards Board ("FASB") ASC 740, *Income Taxes*. Using that guidance, tax positions initially need to be recognized in the financial statements when it is more-likely-than-not the positions will be sustained upon examination by the tax authorities. It also provides guidance for derecognition, classification, interest and penalties, accounting in interim periods, disclosure and transition. As of June 30, 2022 and 2021, the Organization had no uncertain tax positions that qualify for either recognition or disclosure in the financial statements and recognized no such interest or penalties during the years ended June 30, 2022 and 2021.

(2) Government Grants

The Coronavirus Aid, Relief, and Economic Security Act ("CARES Act") and the American Rescue Plan Act (“ARP Act”) established the Provider Relief Fund and American Rescue Plan Rural Distribution program (“PRF”). PRF payments must be used for necessary expenditures incurred due to the public health emergency with respect to the Coronavirus Disease 2019 (COVID–19) between January 1, 2020 and December 31, 2022. Payments passed-through the Department of Health and Human Services and Department of Treasury for distribution in response to the public health emergency onset through the Coronavirus Pandemic. Amounts received from the PRF are recognized as revenue when expenditures have been incurred in compliance with specific terms and conditions of the grant. Of those funds distributed, Monarch expended $818,228 and $2,093,768 during the years ended June 30, 2022 and 2021, respectively.

In addition to PRF, Monarch received and expended $1,768,530 and $1,738,170 in federal and state grants for operational purposes in behavioral health, transportation, food, and disaster relief, during the years ended June 30, 2022 and 2021, respectively.

(3) Investments

In accordance with accounting principles generally accepted in the United States of America, the Organization's investments are shown at aggregate fair value based on quoted prices in active markets. Realized and unrealized gains and losses are reflected in the statements of operations and change in net assets. Investments consisting of mutual funds categorized as Level 1 are $3,462,305 and $4,052,675 at June 30, 2022 and 2021, respectively.

Investment activity for the years ended June 30, 2022 and 2021, is summarized below:

	2022	2021
Investments at beginning of year	$ 4,052,675	3,181,476
Investments purchased	2,004,120	2,302,434
Investments sold/redeemed	(1,887,245)	(2,201,953)
Investment fees	(21,556)	(19,678)
Investment returns:		
Interest and dividend income	71,516	59,085
Realized gains	277,008	223,507
Unrealized gains (losses)	(984,253)	547,211
Amounts appropriated for current operations	(49,960)	(39,407)
Investments at end of year	$ 3,462,305	4,052,675

Investment fees of $21,556 and $19,678 for the years ended June 30, 2022 and 2021, respectively are included in supporting services expenses in the statements of operations and change in net assets.

(4) Property and Equipment

Property and equipment purchased with state funds is to be used only for the purpose of the program granting the funds. Proceeds from the sale of these assets may be required to be returned to the funding agency.

(5) Refundable Advance

On May 7, 2020, the Organization entered into a federally guaranteed loan agreement ("PPP loan") for $10,000,000 with a lender pursuant to a new loan program through the U.S. Small Business Administration ("SBA") as the result of the Paycheck Protection Program ("PPP") established by the CARES Act and amended by the Paycheck Protection Program Flexibility Act of 2020. Under the terms of the PPP loan, the principal may be forgiven if the loan proceeds are used for qualifying expenses as described in the CARES Act, such as payroll costs, benefits, mortgage interest, rent and utilities.

The Organization has accounted for the PPP proceeds under *ASC 958-605 Not-for-Profit Entities: Revenue Recognition.* Under *ASC 958-605*, the proceeds are recorded as conditional and not recognized as revenue until the conditions are substantially met or explicitly waived. On January 12, 2022, the Organization obtained forgiveness of the PPP loan from the SBA and First Citizens Bank and has therefore recognized $10,000,000 of grant revenue in the statement of operations and change in net assets for the year ended June 30, 2022.

(6) Note Payable, Bank

The Organization has available a $2,000,000 line of credit with interest payable monthly at prime (4.75% and 3.25% at June 30, 2022 and 2021, respectively) plus 0.5%. There were no borrowings against the line of credit at June 30, 2022 and 2021. The line of credit matures May 2023 and is collateralized by real estate.

(7) Long-term Debt

Long-term debt as of June 30, 2022 and 2021, is summarized as follows:

	2022	2021
3.8% note, payable in monthly installments of $11,015, including interest, with a final payment due March 2024; collateralized by real property	$ 1,072,815	1,161,793
3.29% to 5.15% notes, payable in aggregate monthly installments of $32,900 including interest, with final payments due March 2023 through June 2027 collateralized by vehicles	970,058	824,531
6.75% note, payable in monthly installments of $2,236, including interest, with a final payment due April 2046; collateralized by real property	317,893	323,097
2.75% EIDL note, payable in monthly installments of $641, including interest, with a final payment due June 2050; collateralized by substantially all assets	138,000	150,000
Non interest bearing note payable in monthly installments of $1,667 with final payment due December 2024; collaterialized by software	49,750	70,000
Non interest bearing note payable in monthly installments of $3,485 with final payment due August 2023; collaterialized by software	48,790	90,609
5.29% unsecured note, payable in monthly installments of $10,213, including interest, with a final payment due February 2023	41,571	159,482
5.25% unsecured note, payable in monthly installments of $11,589, including interest, with a final payment due June 2024	-	85,305

(7) Long-term Debt, Continued

	2022	2021
3.49% note, payable in monthly installments of $1,702, including interest, with a final payment due September 2021; collateralized by real property	$ -	76,109
5.25% unsecured note, payable in monthly installments of $7,831, including interest, with a final payment due April 2022	-	63,135
4.16% unsecured note, payable in monthly installments of $5,514, including interest, with a final payment due October 2021	-	25,675
	2,638,877	3,029,736
Less current installments	525,827	718,745
	$ 2,113,050	2,310,991

Principal maturities for years subsequent to June 30, 2022, are summarized as follows:

Years Ending June 30,	Amount
2023	$ 525,827
2024	1,308,378
2025	218,478
2026	121,414
2027	59,780
Thereafter	405,000
	$ 2,638,877

Certain of the notes contain various restrictive covenants including provisions related to tangible net worth and submission of financial statements. At June 30, 2022, the Organization was in compliance with all of the covenants.

(8) Capital Leases

The Organization leases certain vehicles under the terms of capital lease agreements, which expire through September 2024. The assets and liabilities under the capital leases are recorded at the lower of the present value of the minimum lease payments or the fair value of the assets. The assets are amortized over the estimated useful life of the assets using the straight-line method. Amortization expense related to the leases amounted to $62,354 and $114,566 for 2022 and 2021, respectively. Property and equipment includes $355,899 and $544,889 of assets under capital leases at June 30, 2022 and 2021, respectively. Accumulated amortization was $350,956 and $471,055 at June 30, 2022 and 2021, respectively.

Future minimum lease payments of capital leases for years subsequent to June 30, 2022, are as follows:

Years Ending June 30,	Amount
2023	$ 48,161
2024	1,479
	49,640
Amount representing interest	1,548
	$ 48,092

(9) Operating Leases

Monthly rents for certain IDD homes are based on the residents' social security benefits. The terms of the leases are one year. The homes are owned by the U.S. Department of Housing and Urban Development (HUD). Rent expense was approximately $897,700 and $884,600 for the years ended June 30, 2022 and 2021, respectively.

The Organization also leases certain office facilities and equipment, vehicles, ICF homes, IDD homes and mental health homes under the terms of operating lease agreements, some of which are month-to-month and others that expire through July 2036.

(9) Operating Leases, Continued

Future minimum rentals for five years subsequent to June 30, 2022, and in the aggregate are as follows:

Years Ending June 30,	Amount
2023	$ 1,940,496
2024	1,421,411
2025	1,109,676
2026	820,583
2027	360,012
	$ 5,652,178

Rent expense for the years ended June 30, 2022 and 2021, was approximately $2,576,000 and $2,275,600, respectively.

(10) Employee Benefit Plans

(a) 403(b) Plan

The Organization has a 403(b) plan which covers substantially all employees who meet eligibility requirements. Contributions are made at the discretion of management. During the years ended June 30, 2022 and 2021, the Organization did not make any retirement contributions.

(b) Employees' Basic Group Health Plan

The Organization provides certain medical benefits to eligible employees and covered dependents through an employee welfare benefit plan. Contributions to the Plan are made by Plan participants and the Organization. The Plan is responsible for all eligible claims up to a maximum of $200,000 per individual and an aggregating specific of $155,000 (individual or combined individuals) up to the group aggregate established by expected claims and reinsurance. The group aggregate for the fiscal years ended June 30, 2022 and 2021, was $9,991,882 and $9,922,351, respectively. Claims in excess of this amount are covered by contracts with an insurance company.

(11) Economic Dependence

A substantial portion of the Organization's revenue is derived through programs funded by the State of North Carolina Department of Health and Human Services through the following agencies:

	2022		2021
Division of Health Benefits (Medicaid)	50	%	51
Division of Mental Health, Developmental Disabilities and Substance Abuse Services	25		33
Total	75	%	84

(12) Liquidity

The Organization’s financial assets available within one year of the balance sheet date for general expenditure are as follows:

Cash and cash equivalents	$ 16,788,490
Accounts receivable, net of allowance for doubtful accounts	5,687,056
	$ 22,475,546

As part of the Organization’s liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities, and other obligations are due. In addition, the Organization has investments that may be appropriated for expenditure by management.

(13) Contingencies

At June 30, 2022, the Organization had certain claims and litigation pending, all of which were in the ordinary course of business. In the opinion of management, settlement of these claims and litigation pending against the Organization will not have a material adverse effect on the Organization’s financial condition.

(14) Accounting Impact of COVID-19

On January 30, 2020, the World Health Organization ("WHO") announced a global health emergency because of a new strain of coronavirus originating in Wuhan, China (the "COVID-19 outbreak") and the risks to the international community as the virus spreads globally beyond its point of origin. In March 2020, the WHO classified the COVID-19 outbreak as a pandemic, based on the rapid increase in exposure globally.

The full impact of the COVID-19 outbreak continues to evolve as of the date of this report. As such, it is uncertain as to the full magnitude that the pandemic will have on the Organization's financial condition, liquidity, and future results of operations. Management is actively monitoring the global situation on its financial condition, liquidity, operations, suppliers, industry, and workforce. Given the daily evolution of the COVID-19 outbreak and the global responses to curb its spread, the Organization is not able to estimate the effects of the COVID-19 outbreak on its results of operations, financial condition, or liquidity for the year ending June 30, 2023.

Although the Organization cannot estimate the length or gravity of the impact of the COVID-19 outbreak at this time, if the pandemic continues, it may have an adverse effect on the Organization's results of future operations, financial position, and liquidity in the year ending June 30, 2023.

(15) Subsequent Events

The Organization has evaluated subsequent events through October 20, 2022, the date which the financial statements were available to be issued. There were no significant subsequent events identified which require disclosure in the financial statements or footnotes.

SUPPLEMENTARY INFORMATION

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Schedule 1 - Combining Schedule of Financial Position

June 30, 2022

Assets

	The Arc of Stanly County	Investment Fund	Supports and Public Relations	Residential Services	Day and Employment Services	Behavioral Health	Health Insurance Fund	Subtotal	Eliminations	Total
Current assets:										
Cash and cash equivalents	$ (115,321)	161,577	9,761,495	13,106,682	1,899,535	(13,056,734)	5,031,256	16,788,490	-	16,788,490
Residents' cash	-	-	-	279,986	-	-	-	279,986	-	279,986
Accounts receivable	852	-	589,492	1,735,886	402,206	2,532,880	425,740	5,687,056	-	5,687,056
Prepaid expenses	165	-	934,405	-	24,562	38,645	-	997,777	-	997,777
Total current assets	(114,304)	161,577	11,285,392	15,122,554	2,326,303	(10,485,209)	5,456,996	23,753,309	-	23,753,309
Property and equipment:										
Land and land improvements	74,825	35,614	14,508	172,673	43,188	239,758	-	580,566	-	580,566
Buildings and improvements	553,857	409,597	1,051,679	1,670,190	745,309	5,851,890	-	10,282,522	-	10,282,522
Equipment	27,749	13,267	3,782,513	368,632	415,769	575,658	-	5,183,588	-	5,183,588
Furniture and fixtures	-	-	198,650	104,218	30,603	398,319	-	731,790	-	731,790
Vehicles	-	-	832,758	2,532,245	1,280,234	1,528,821	-	6,174,058	-	6,174,058
	656,431	458,478	5,880,108	4,847,958	2,515,103	8,594,446	-	22,952,524	-	22,952,524
Less accumulated depreciation	479,397	417,157	4,753,777	4,154,876	2,110,834	2,366,841	-	14,282,882	-	14,282,882
Net property and equipment	177,034	41,321	1,126,331	693,082	404,269	6,227,605	-	8,669,642	-	8,669,642
Other assets:										
Cash value of life insurance	-	-	201,404	-	-	-	-	201,404	-	201,404
Investments	-	3,462,305	-	-	-	-	-	3,462,305	-	3,462,305
Total other assets	-	3,462,305	201,404	-	-	-	-	3,663,709	-	3,663,709
Total assets	$ 62,730	3,665,203	12,613,127	15,815,636	2,730,572	(4,257,604)	5,456,996	36,086,660	-	36,086,660

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Schedule 1 - Combining Schedule of Financial Position, Continued

Liabilities and Net Assets

	The Arc of Stanly County	Investment Fund	Supports and Public Relations	Residential Services	Day and Employment Services	Behavioral Health	Health Insurance Fund	Subtotal	Eliminations	Total
Current liabilities:										
Current installments of long-term debt	$ 5,539	-	160,355	160,072	55,068	144,793	-	525,827	-	525,827
Current installments of capital lease obligations	-	-	5,780	30,240	10,593	-	-	46,613	-	46,613
Accounts payable and accrued expenses	2,631	-	2,958,116	1,068,270	269,402	1,752,863	1,442,984	7,494,266	-	7,494,266
Residents' cash liability	-	-	-	279,986	-	-	-	279,986	-	279,986
Deferred revenue	-	-	640,267	-	-	479,455	-	1,119,722	-	1,119,722
Total current liabilities	8,170	-	3,764,518	1,538,568	335,063	2,377,111	1,442,984	9,466,414	-	9,466,414
Long-term liabilities:										
Long-term debt	312,354	-	323,668	284,070	76,302	1,116,656	-	2,113,050	-	2,113,050
Capital lease obligations	-	-	-	1,479	-	-	-	1,479	-	1,479
Total long-term liabilities	312,354	-	323,668	285,549	76,302	1,116,656	-	2,114,529	-	2,114,529
Total liabilities	320,524	-	4,088,186	1,824,117	411,365	3,493,767	1,442,984	11,580,943	-	11,580,943
Net assets without donor restrictions	(257,794)	3,665,203	8,524,941	13,991,519	2,319,207	(7,751,371)	4,014,012	24,505,717	-	24,505,717
Total liabilities and net assets	$ 62,730	3,665,203	12,613,127	15,815,636	2,730,572	(4,257,604)	5,456,996	36,086,660	-	36,086,660

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Schedule 2 - Combining Schedule of Operations and Change in Net Assets

Year Ended June 30, 2022

	The Arc of Stanly County	Investment Fund	Supports and Public Relations	Residential Services	Day and Employment Services	Behavioral Health	Health Insurance Fund	Subtotal	Eliminations	Total
Revenue, gains, and other support:										
Sales - merchandise and service	$ -	-	-	-	18,987	-	-	18,987	-	18,987
Less: Cost of materials and supplies	-	-	-	-	6,231	-	-	6,231	-	6,231
Less: Cost of labor	-	-	-	-	8,975	-	-	8,975	-	8,975
Gross profit	-	-	-	-	3,781	-	-	3,781	-	3,781
Medicaid	-	-	-	25,621,894	6,577,339	20,149,289	-	52,348,522	-	52,348,522
Mental health	-	-	-	7,696,360	2,104,830	15,601,951	-	25,403,141	-	25,403,141
Resident rent	-	-	-	4,787,416	-	-	-	4,787,416	-	4,787,416
Medicare	-	-	-	-	-	1,541,027	-	1,541,027	-	1,541,027
Vocational rehabilitation	-	-	-	-	-	336,947	-	336,947	-	336,947
Rent	33,738	63,396	-	-	1,156	-	-	98,290	(63,396)	34,894
Insurance	-	-	-	-	-	1,645,005	-	1,645,005	-	1,645,005
Private pay	-	-	-	-	-	824,553	-	824,553	-	824,553
Other revenue	1,293	2,092	620,077	1,053,846	490,220	1,339,585		3,507,113	-	3,507,113
County funds	-	-	-	30,000	350,828	56,738	-	437,566	-	437,566
Interest and dividends	9	71,516	3,884	-	-	-	-	75,409	-	75,409
Contributions	-	-	64,779	72,700	20,010	45,031	-	202,520	-	202,520
Interest subsidy	30,045	-	-	-	-	-	-	30,045	-	30,045
Special events and projects	-	-	52,289	-	-	-	-	52,289	-	52,289
Transportation fees	-	-	-	-	4,738	-	-	4,738	-	4,738
Refunds and reimbursements	-	-	161,634	66,852	-	-	-	228,486	-	228,486
Gain on disposal of property and equipment	-	-	9,000	176,423	6,775	-	-	192,198	-	192,198
Realized and unrealized losses on investments	-	(707,245)	-	-	-	-	-	(707,245)	-	(707,245)
Grant - PPP loan	-	-	10,000,000	-	-	-	-	10,000,000	-	10,000,000
Grants	-	-	1,086,830	-	268,112	1,360,025	-	2,714,967	-	2,714,967
Total revenue, gains, and other support	65,085	(570,241)	11,998,493	39,505,491	9,827,789	42,900,151	-	103,726,768	(63,396)	103,663,372

MONARCH

Schedule 2 - Combining Schedule of Operations and Change in Net Assets, Continued

	The Arc of Stanly County	Investment Fund	Supports and Public Relations	Residential Services	Day and Employment Services	Behavioral Health	Health Insurance Fund	Subtotal	Eliminations	Total
Expenses:										
Salaries and wages	$ -	-	8,796,727	19,154,686	4,794,040	26,669,360	-	59,414,813	-	59,414,813
Employee benefits	-	-	1,559,759	4,497,194	1,237,945	5,297,899	-	12,592,797	-	12,592,797
Staff travel and training	70	-	147,897	329,930	160,664	458,970	-	1,097,531	-	1,097,531
Food and provisions	-	-	16,889	775,031	11,931	263,868	-	1,067,719	-	1,067,719
Supplies	428	-	1,177,082	274,622	54,695	386,684	-	1,893,511	-	1,893,511
Client recreation	-	-	-	16,409	25	22,443	-	38,877	-	38,877
Medical services and supplies	-	-	2,851	122,775	9,801	85,964	-	221,391	-	221,391
Telephone	465	-	276,130	276,376	72,855	448,517	-	1,074,343	-	1,074,343
Office supplies and postage	-	-	73,368	18,473	6,400	44,455	-	142,696	-	142,696
Contract services	7,059	-	1,592,718	617,530	444,988	2,351,309	-	5,013,604	-	5,013,604
Gas and oil	-	-	46,600	250,871	72,848	48,986	-	419,305	-	419,305
Miscellaneous	6,938	21,556	209,654	59,782	18,457	64,439	-	380,826	-	380,826
Medicaid assessment	-	-	-	713,807	-	-	-	713,807	-	713,807
Tax and license fees	-	-	4,965	35,574	4,298	50,271	-	95,108	-	95,108
Advertising and printing	-	-	235,654	10,181	1,556	79,879	-	327,270	-	327,270
Bad debt expense	-	-	-	143,297	62,826	1,376,499	-	1,582,622	-	1,582,622
Building and equipment rent	-	-	177,801	1,268,367	476,108	1,892,869	-	3,815,145	(63,396)	3,751,749
Utilities	16,052	-	15,445	283,073	123,674	150,133	-	588,377	-	588,377
Insurance - general	2,378	-	104,340	282,990	153,345	188,469	-	731,522	-	731,522
Repairs and maintenance	21,114	-	1,256,585	609,300	166,182	423,211	-	2,476,392	-	2,476,392
Depreciation	13,600	2,449	348,273	287,722	114,890	351,355	-	1,118,289	-	1,118,289
Amortization	-	-	-	13,588	3,484	17,769	-	34,841	-	34,841
Interest expense	4,174	-	9,080	23,153	8,119	54,202	-	98,728	-	98,728
Administrative overhead	-	-	(13,424,650)	4,594,467	1,223,132	7,607,051	-	-	-	-
Allocations	9,745	-	(1,093,619)	865,216	230,594	(11,936)	-	-	-	-
Living subsidies	-	-	-	9,900	-	-	-	9,900	-	9,900
Fundraising expenses	-	-	12,626	-	-	-	-	12,626	-	12,626
Total expenses	82,023	24,005	1,546,175	35,534,314	9,452,857	48,322,666	-	94,962,040	(63,396)	94,898,644
Changes in net assets	(16,938)	(594,246)	10,452,318	3,971,177	374,932	(5,422,515)	-	8,764,728	-	8,764,728
Net assets at beginning of year	(240,856)	4,259,449	(1,927,377)	10,020,342	1,944,275	(2,328,856)	4,014,012	15,740,989	-	15,740,989
Net assets at end of year	$ (257,794)	3,665,203	8,524,941	13,991,519	2,319,207	(7,751,371)	4,014,012	24,505,717	-	24,505,717

Independent Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance With *Government Auditing Standards*

The Board of Directors
Monarch:

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of Monarch (a nonprofit organization), which comprise the statement of financial position as of June 30, 2022, and the related statements of operations and change in net assets, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated October 20, 2022.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered Monarch's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Monarch's internal control. Accordingly, we do not express an opinion on the effectiveness of Monarch's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether Monarch's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Davidson, Holland, Whitesell & Co., PLLC

Hickory, North Carolina
October 20, 2022

Independent Auditors' Report on Compliance for Each Major Program and on Internal Control Over Compliance Required by the Uniform Guidance

The Board of Directors
Monarch:

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited Monarch's compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of Monarch's major federal programs for the year ended June 30, 2022. Monarch's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

In our opinion, Monarch complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2022.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of Monarch and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of Monarch's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to Monarch's federal programs.

Auditors' Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on Monarch's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about Monarch's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with generally accepted auditing standards, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.

- Identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding Monarch's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.

- Obtain an understanding of Monarch's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of Monarch's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Other Matters

Report on Internal Control over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Davidson, Holland, Whitesell & Co., PLLC

Hickory, North Carolina
October 20, 2022

MONARCH

Schedule of Findings and Questioned Costs

Year Ended June 30, 2022

Summary of Independent Auditors' Results

Financial Statements

Type of report the auditor issued on whether the financial statements audited were prepared in accordance to GAAP: Unmodified

Internal control over financial reporting:

- Material weakness(es) identified? ____yes __X_no
- Significant Deficiency(s) ____yes __X_none reported

Noncompliance material to financial statements noted? ____yes __X_no

Federal Awards

Internal control over major federal programs:

- Material weakness(es) identified? ____yes __X_no
- Significant Deficiency(s) identified ____yes __X_none reported

Type of auditor's report issued on compliance for major federal programs: Unmodified.

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)? ____yes __X_no

Identification of major federal programs:

Assistance Listing No(s).	Names of Federal Program or Cluster
93.829	Certified Community Behavior Health Clinic Demonstration

Dollar threshold used to distinguish between Type A and Type B Programs $750,000

Auditee qualified as low-risk auditee? __X__yes ____no

Findings – Financial Statement Audit

None reported.

Findings and Questioned Costs – Major Federal Award Programs Audit

None reported.

MONARCH

Schedule of Expenditures of Federal Awards

Year Ended June 30, 2022

Federal Grantor/Pass-through Grantor/Program Title	Federal CFDA Number	Pass-through Entity Identifying Number	Federal Expenditures
U.S. Department of Health and Human Services			
Substance Abuse and Mental Health Administration			
Certified Community Behavior Health Clinic Demonstration	93.829	H79SM083115	$ 1,388,366
Substance Abuse and Mental Health Administration			
Pass-through: North Carolina Department of Health and Human Services, DMH/DD/SAS			
Projects for Assistance in Transition of Homelessness (PATH)	93.150	X06SM085835	141,006
Total U.S. Department of Health and Human Services			1,529,372
U.S. Department of Transportation			
Pass-through: North Carolina Department of Transportation			
Enhanced Mobility of Seniors & Individuals with Disabilities	20.513	22-ED-913	239,158
Total U.S. Department of Transportation			239,158
Total expenditures of Federal awards			$ 1,768,530

Notes to the Schedule of Expenditures of Federal Awards

1. Basis of Presentation

The accompanying schedule of expenditures of federal awards (SEFA) includes the federal grant activity of Monarch under the programs of the federal government for the year ended June 30, 2022. The information in the SEFA is presented in accordance with the requirements of *Title 2 US Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the SEFA presents only a selected portion of the operations of Monarch, it is not intended to and does not present the financial position, statement of operations and change in net assets, functional expenses, or cash flows of Monarch.

2. Summary of Significant Accounting Policies

Expenditures reported in the SEFA are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in Uniform Guidance, wherein certain types of expenditures are not allowed or are limited as to reimbursement.

3. Indirect Cost Rate

Monarch has elected to use the 10-percent de minimis indirect cost rate as allowed under the Uniform Guidance.

Budget Cabarrus County RFP - Consolidated Services	Annual
42271 Medicare	$ -
42276 Medicaid Services - Tailored Plan	$ 4,814,399
43380 State IPRS Funds	$ 7,221,598
43385 Mental Health (Expensed Based)	$ -
43394 Grant Revenue	$ -
48850 Insurance Premiums	$ -
48890 Other Revenue	$ -
48891 Private Pay	$ -
48895 Allowance for Doubtful Accounts	$ (300,900)
48895-INPUT Allowance for Doubtful Accounts	$ -
48896 Unresolved Allowance	$ -
REV40000 Total Revenue	**$ 11,735,097**
51120 Salaries-Indirect	$ 639,642
51129 Temporary Service Agency (Nursing)	$ 202,491
51121 Salaries-Direct	$ 6,709,549
51122 Parttime Salaries	$ -
51123 Temps/Subs	$ -
51128 Overtime	$ 134,191
51181 FICA Contribution	$ 562,213
51183 Health Insurance Benefit	$ 672,570
51185 Unemployment Insurance	$ -
51186 Workers Comp. Expense	$ 161,682
51187 Drug Screens	$ 5,400
51188 Staff Appreciation	$ -
51199 Criminal Verifications	$ 3,900
EXP-01 Total Personnel Expenses	**$ 9,091,637**
52211 Housekeeping Supplies	$ 43,920
52221 Food & Provisions	$ 333,360
52230 Linen & Bedding	$ 226,800
52231 Program & Operating Supplies	$ 78,480
52237 Legend Drugs	$ 37,440
52238 Supplies-Medical	$ 62,640
52239 Non-legend Drugs	$ -
52245 Personal Hygiene Items	$ 18,720
52251 Motor Fuels	$ -
52261 Office Supplies	$ 6,000
52271 Expensed Equipment	$ 4,500
52272 Computer Equip & Software	$ 15,000
52299 Miscellaneous	$ 650
53311 Staff Travel	$ 10,000
53341 Printing	$ -
53395 Staff Training	$ 7,200
54491 Dues & Subscriptions	$ 18,000
55510 Furniture & Fixtures	$ 6,000
57705 Consultative Services	$ 10,200
57714 Contract Psych Services	$ -
53318 Recreation	$ 57,600
EXP-02 Accountable Expense Line Items	**$ 936,510**
53321 Telephone Service	$ 10,800
53325 Postage	$ 200
53326 Security Monitoring	$ 1,800
53331 Electric, Water & Sewer	$ 24,000
53333 Natural Gas	$ 6,000
53339 Cable/Internet	$ 7,200
53351 Repair & Maintenance-Building	$ 25,000
53352 Repairs & Maintenance-Equipment	$ 2,000
53353 Repairs & Maintenance-Vehicle	$ -
53356 Exterminating Service	$ 1,800
53357 Garbage & Trash Disposal	$ 2,400
53358 Equip. Maintenance Agreement	$ -
53371 Advertising	$ 6,600
54412 Rent Building	$ -
54421 Lease Equipment	$ 7,200
54451 Insurance-Property & General Liability	$ 9,600
54452 Insurance-Professional Liability	$ 1,200
54453 Insurance-Vehicle	$ -
54460 Depreciation Expense	$ 150,000
54493 Tax & License	$ 3,600
54495 Interest Exp (Loan Ser)	$ -
56620 Allocation-Maintenance	$ 9,000
56624 Allocation-Training	$ 26,191
56628 Allocation-Vehicles	$ -
56630 Allocation - Quality Management	$ 52,383
56640-2191 2191 Operations Allocations	$ -
56681-Central Overhead Allocation	$ 969,081
56682-2192 2192 Regional Alloc	$ 120,000
57727 Contracted Cleaning Service	$ 48,000
57728 Contracted Grounds Maint.	$ 12,000
57729 Contracted Transportation	$ -
5xxxx Security Personnel/Outside Contractor	$ 208,000
EXP-03 Non-Accountable Expense Line Items	**$ 1,704,055**
EXP50000 Total Expenses	**$ 11,732,202**
NET-1 Net Income	**$ 2,895**

PRTF Staffing

Indirect	Staff includes: Budgeted:	FTE
1	Program Director	1.00
1	Administrative Assistant	1.00
1	Admissions Coordinator	1.00
1	Assistant Program Director	1.00
	Total FTE calc'd to Personnel	**4.00**

Direct	Staff includes Budgeted:	FTE
0.25	Assoc Medical Director (1 FTE over facility)	0.25
1	Child Psychiatrist Provider	1.00
0.25	Nurse Manager (1 FTE over facility)	0.25
4.5	Registered Nurse	4.50
3	Behavioral Therapist	3.00
1	Lead Behavioral Technician	1.00
32	Behavioral Technician	32.00
0.25	Director of Occupational Therapy	0.25
2	COTA	2.00
0	Lead Teacher/Academic Director	-
4	Teacher	4.00
1	Care Manager/QP	1.00
0.25	Chef	0.25
0.5	Chef Assistant	0.50
	Total FTE calc'd to Personnel	**50.00**

BHUC Staffing

Indirect	Staff includes: Budgeted:	FTE
1	Program Director	1.00
2	Administrative Assistant	2.00
1	Assistant Program Director	1.00
0		0.00
	Total FTE calc'd to Personnel	**4.00**

Direct	Staff includes Budgeted:	FTE
0.25	Assoc Medical Director (1 FTE over facility)	0.25
0.25	Nurse Manager (1 FTE over facility)	0.25
5	APP - NP/PA	5.00
5	Registered Nurse	5.00
5	Behavioral Therapist	5.00
0		-
2	Qualified Professional	2.00
5	Peer Support Specialist	5.00
1	LCAS	1.00
0.25	Chef	0.25
0.5	Chef Assistant	0.50
0		-
	Total FTE calc'd to Personnel	**24.25**

FBC Staffing

Indirect	Staff includes: Budgeted:	FTE
0.5	Program Director (Split FBC/SUD)	0.50
1	Administrative Assistant	1.00
0		0.00
0		0.00
	Total FTE calc'd to Personnel	**1.50**

Direct	Staff includes Budgeted:	FTE
0.25	Assoc Medical Director (1 FTE over facility)	0.25
0.5	Physician	0.50
1	APP - NP/PA	1.00
0.25	Nurse Manager (1 FTE over facility)	0.25
5	Registered Nurse	5.00
2	Behavioral Therapist	2.00
4.75	Behavioral Technician	4.75
2	Qualified Professional	2.00
0	Peer Support Specialist	-
0.25	Chef	0.25
0.5	Chef Assistant	0.50
0		-
	Total FTE calc'd to Personnel	**16.50**

SUD Staffing

Indirect	Staff includes: Budgeted:	FTE
0.5	Program Director (Split FBC/SUD)	0.50
1	Administrative Assistant	1.00
0		0.00
0		0.00
	Total FTE calc'd to Personnel	**1.50**

Direct	Staff includes Budgeted:	FTE
0.25	Associate Medical Director (1 FTE over facility)	0.25
0.5	Physician	0.50
1	APP - NP/PA	1.00
0.25	Nurse Manager (1 FTE over facility)	0.25
5	Registered Nurse	5.00
2	Behavioral Therapist	2.00
4.75	Behavioral Technician	4.75
2	Qualified Professional	2.00
0	Peer Support Specialist	-
1	LCAS	1.00
0.25	Chef	0.25
0.5	Chef Assistant	0.50
	Total FTE calc'd to Personnel	**17.50**

Indirect Staffing:	
PRTF	4.00
BHUC	4.00
FBC	1.50
SUD	1.50
Total Indirect Staffing:	11.00

Direct Staffing:	
PRTF	50.00
BHUC	24.25
FBC	16.50
SUD	17.50
Total Direct Staffing:	108.25

Total Consolidated FTE: 119.25

Financial Management Capabilities

Dedicated accounts payable staff, accounts receivable staff, payroll staff and a budget analyst will support each of the 4 operations for the Cabarrus Regional Behavioral Health Center (BHUC, PRTF, Adult FBC, and Adult SUD). This team is led by our Chief Financial Officer and Controller. The accounts receivable and payable staff have an average tenure of 15 years with Monarch which includes billing experience within Behavioral Health for BHUC, Adult FBC, and Adult SUD, Child & Adolescent FBC and Goodale School programs and have experience being the representative payee for 330 people that we serve. We bill to each of the LME/MCOs in North Carolina as well as close to 50 commercial insurance payers. Due to the tenure of our billing team, they have established relationships with each of our LME/MCO partners and remain in regular communication to review and resolve billing issues as they arise.

Monarch manages all accounting and billing online and is supported by our IT department to make sure each platform is properly integrated with the many sources required to exchange financial information. Our accounting system, Black Baud is fully integrated with Workday for Human Resources and Payroll and Credible, our EHR platform for billing. Financials are independently audited on an annual basis by Davidson Holland Whitesell.

Monthly financials for the Agency and each service line are reviewed by the executive team and the board of directors. Monarch believes in transparency, so these are also reviewed by each department and cost center to discuss both revenue and expense. The cross collaboration between finance, operations and coding supports optimization of revenue, correct billing practices and a focus on quality and compliance.

Each service line at the Cabarrus County Behavioral Health Complex will follow our standard financial process and operating procedures. This will include the following processes:

Purchase Orders
Proper invoice approvals
Position control and time management system for payroll
Monthly financial package
Monthly operational reviews to identify trends and areas for improvement.
Annual budget process

We are closely watching Medicaid Expansion currently considered for the state. While the total implications are unknown at this point, we anticipate improved coverage for individuals with more individuals being eligible for services. We continue to monitor for changes in state reimbursement compared to Medicaid reimbursement as this becomes effective.

human eXperience
Architects | Consultants | Thinkers

March 7, 2023

Rodney Harris
Deputy County Manager
Cabarrus County

Re: Reference for Monarch

Dear Rodney:

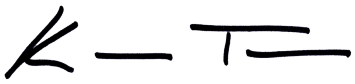
I am writing this letter to summarize how much I have enjoyed working with Monarch over the last 15+ years. That relationship has involved collaborating on design and construction projects, supporting mission related causes, and talking about how we can most effectively make a positive impact on the behavioral health environment in North Carolina.

I first met Peggy Terhune at a conference around 2012, when I heard her speak about the new crisis program Monarch developed to support people in need. In the years following that meeting, I have had the chance to work with many leaders and staff at Monarch on a variety of projects. The one thing that has been consistent across everyone I meet at Monarch is that they are truly committed to the organization's mission. The conversations are always about care, always about doing what is best for patients and clients, and always about doing the most possible with limited resources.

When we have reached out to Monarch for expert knowledge to supplement our own experience, Monarch leadership always says yes, providing valuable insights and help without ever asking what is in it for them. When Monarch leaders reach out to us for assistance, we always say yes. Because that is what friends do.

I value the relationship we have built with Monarch leaders, past and present, over the years. I feel strongly that they are an organization committed to serving vulnerable populations in North Carolina.

Sincerely,



Kevin M. Turner, AIA, LEED AP
Principal Architect

March 13, 2023

Rodney Harris
Deputy County Manager
Cabarrus County

Re: Letter of Recommendation for Monarch

Dear Rodney:

On behalf of NAMI, it is my pleasure to write a letter in support of Monarch's Request for Proposal (RFP) for a Regional Behavioral Health Facility in Cabarrus County. Monarch has been a wonderful partner with NAMI and is a committed advocate to providing people with mental illness, substance use disorders and intellectual disabilities the quality care to help them reach their health goals.

My work with Peggy Terhune and the staff at Monarch has always been a positive experience. The organization employs staff who are passionate about caring for the people they support and are always willing to lend a hand to ensure our efforts at NAMI are successful. They also do a wonderful job helping support and educate the families/caregivers or other key stakeholders in the care of their patients.
I know having Monarch as the provider for the Cabarrus County Behavioral Health Facility will provide the community with top quality care that will improve the lives of those they serve and wholeheartedly recommend the organization as the top candidate for your RFP.

Sincerely,
Anjie Vickers
Anjie Vickers MSN, RN
President NAMI Cabarrus

benchmarks
An Alliance of Agencies Helping
Children, Adults & Families

March 13, 2023

Rodney Harris
Deputy County Manager
Cabarrus County

Re: Letter of Recommendation for Monarch

Dear Mr. Harris:

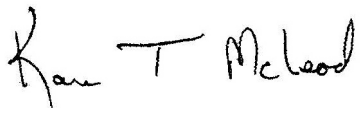
On behalf of Benchmarks, it is my pleasure to write a letter in support of Monarch's Request for Proposal (RFP) for a Regional Behavioral Health Facility in Cabarrus County. Monarch stands out as a premier behavioral health provider in North Carolina.

Monarch has a strong reputation and track record of continued commitment in providing innovative services that best meet the needs of people in North Carolina with behavioral health and/or I/DD disability. The organization has remained true to their mission and always puts the people they serve first.

Monarch's CEO, Dr. Terhune, is an advocate for the families and caregivers they serve and through her leadership have been diverting people with behavioral health needs from emergency departments through their BHUC in Wake County and their Child and Adolescent Facility Based Crisis center in Charlotte. Furthermore, Monarch is willing to assist other agencies and the state to solve complex problems that impact access to quality care.

I strongly encourage you to choose Monarch as the provider for the Cabarrus County Behavioral Health Facility, and I wholeheartedly recommend the organization to provide each of the service lines described in the RFP.

Sincerely,



Karen Taylor McLeod, MSW
BENCHMARKS
President/CEO

AleraHealth

March 10, 2023

Rodney Harris
Deputy County Manager
Cabarrus County

Re: Alera Health Letter of Recommendation for Monarch

Dear Mr. Harris:

On behalf of Alera Health, it is my pleasure to write a letter in support of Monarch's Request for Proposal (RFP) for a Regional Behavioral Health Facility in Cabarrus County. Monarch remains committed to supporting, educating, and empowering people with developmental disabilities and intellectual disabilities, mental illness and substance use disorders to choose and achieve what is important to them.

Monarch has responded to the community needs in Raleigh, North Carolina through the successful implementation of a Behavioral Health Urgent Care (BHUC). Monarch's BHUC has diverted individuals from unnecessarily entering hospital emergency rooms and is staffed with high quality, caring teams of psychiatrists, therapists, and nurses.

Across North Carolina, Monarch plays a significant role in the continuum of care through the services it provides and its extensive partnerships with key community stakeholders. Monarch understands the role that the Behavioral Health Urgent Care (BHUC) plays in the larger landscape of holistic service delivery, which allows for optimal outcomes for individuals and families.

I hope you will look favorably upon their request and thank you for your service to the community.

Sincerely,

Kathryn H Smith, Ph.D.

Kathy Smith, Ph.D. (She, Her)
Chief Operating Officer
Alera Health | Uncommonly Good Collaborations
p: 919.610.9433 | Email | LinkedIn | alerahealth.com
Wilmington, NC (EST)

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From: pennyj8@verizon.net <pennyj8@verizon.net>
Sent: Monday, March 13, 2023 4:04 PM
To: Laurie Weaver <Laurie.Weaver@monarchnc.org>
Subject: Monarch Letter of Support – Cabarrus Behavioral Health Center

March 13, 2023

Rodney Harris, Deputy County Manager
Cabarrus County
PO Box 707
Concord, NC 28026

Dear Mr. Harris,

As a former recipient of services at Monarch's Lumberton Facility Based Crisis Center, I am writing in support of Monarch's application to provide services at the Cabarrus County Regional Behavioral Health Center.

In 2019, I reached a low point in my life and found myself experiencing a mental health crisis. Following a series of life challenges including a substance use disorder, post-traumatic stress disorder and depression, I needed help and reached out to Monarch's Facility Based Crisis Center in Lumberton. There, I found the support I needed to navigate the crisis I was experiencing and a connection to on-going therapy that I still find helpful today.

As a result of the care I received then and since, I have gone on to become a Peer Support Specialist and I use my experience to help others navigate the mental health and substance use challenges they face.

The help and support I found at Monarch is something that should be available to everyone who needs it. There are not enough crisis resources in North Carolina, and I applaud Cabarrus County for working to address this need. I know that Monarch is well-equipped to provide these services to people there, just as they did for me.

Thank you.

Sincerely,

Penny Markey
Peer Support Specialist
(410) 961-9113

March 13, 2023

Monarch
Melissa Hall
350 Pee Dee Avenue
Albemarle, NC 28001

To Whom It May Concern,

This letter is being written at the request of Monarch.

Monarch is a current provider in the Partners Health Management Network. They are in good standing and have been in network since 2013. Monarch serves the following populations: adults and youth in the following counties: Cabarrus, Cleveland, Davie, Forsyth, Gaston, Lincoln, Rutherford, Stanly, and Union for Partners Health Management network.

Following review of the above documentation, Partners deems the provider's request for consideration of services appropriate. This letter is not intended as an endorsement of the Provider, quality of services, nor is it to be interpreted as a guarantee of business. Information utilized to assess provider status is current as of the date of the letter and subject to change

Sincerely,

Jamie Sales

Jamie Sales, MaEL
Network Development Manager

Please complete the grid for your service line

1. For each assessment, indicate if it is required and the frequency (ex - at admission and every 90 days)
2. In last column, reference which outside agency or state/federal requirement determines our frequency for the assessment

N/A+L27:

	Behavioral Health								Enhanced Services									Other	
Assessment	**CCBHC (on-hold)**	**FBC - adult**	**FBC - child**	**MAT**	**Mobile Crisis**	**Outpatient (Med Mgmt)**	**Outpatient (Therapy)**	**Urgent Care**	**ACTT**	**ACTT-Child**	**CST**	**IIH**	**Peer Support**	**Peer Bridger**	**IPS**	**PSR**	**Club Horizon**	**Goodale School**	**Comments - Related Requirements**
24-hour ACUTE SCREENING	N/A			N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
AIMS	AS needed if on Psychotropic Medication	AS needed if on Psychotropic Medication	AS needed if on Psychotropic Medication		N/A	AS needed if on Psychotropic Medication every 6 months (more frequent if needed)	N/A	Completed during visit if individual currently on an antipsychotropic medication	Every 3 months if on Psychotropic Medication		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	AIMS required every 6 months per Monarch policy (Monitoring Psychotropic Medication). MM.01.01.05 EP 1 requires we monitor, but does not specify frequency Mobile Crisis
ASAM	At Intake if SUD Dx is given and monthly thereafter if in SAIOP.	At time of assessment if active use of substance; updated as needed for any active use	At time of assessment if active use of substance; updated as needed for any active use		N/A	At time of assessment if active use of substance; updated as needed for any active use	At CCA and once a month if receiving outpatient substance abuse treatment	Provider completing if active use of substance as part of Psych Eval. Up to individual clinician discretion. (at one time this was included, but	At CCA and every authorization with a substance use disorder		At CCA and every authorization with a substance use disorder	At CCA and every authorization with a substance use disorder	N/A	N/A	Cardinal requires with authorization request if SU diagnosis	N/A	N/A	N/A	State requirement - upon admission service delivery with substance use disorder diagnosis. "Ongoing basis" but no time frame defined. How have we defined ongoing basis? CTS.02.03.07 EP 7 - assessment requirements for MAT admission CTS.02.03.13 EP1 - level of care for placement at admission
CAGE-AID	At Intake if Sud Dx is given.	Not required. Up to individual clinician discretion.	Not required. Up to individual clinician discretion.		completed at time of crisis assessment.	not required	not required	up to individual clinician discretion. (at one time this was included, but recently streamlined assessments completed during BHUC admission)	Upon intake and with any CCA reassessments		Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	N/A	CTS.02.01.03 - Screenings/assessments are completed per policy & timeframe defined per policy
CALOCUS	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	CTS.02.01.03 - Screenings/assessments are completed per policy & timeframe defined per policy
COWS	MAT program - for inductions only	For individuals in detox if ordered by provider. Frequency defined by provider order.	N/A		N/A	N/A	N/A	N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	CTS.02.01.03 - Screenings/assessments are completed per policy & timeframe defined per policy
CCA	Completed by therapist (CCA) upon admission to services. oBe assessment will be completed whenever clinically indicated, such as a change in diagnosis, or when required by service definition	On Admission (within 24 hours of admission)	On Admission (within 24 hours of admission)		completed at time of crisis assessment.	Completed prior to receiving services; Re-assessment will be completed whenever clinically indicated, such as a change in diagnosis, or when required by service definition	Completed by therapist (CCA) as part of determining which services are needed; CCA addendum completed at 12 months. Full CCA completed at 24 months. Re-assessment will be completed whenever clinically indicated, such as a change in diagnosis, or when required by service definition	N/A	At intake/admission and as required by service definition		At intake/admission and as required by service definition	At intake/admission and as required by service definition	At intake/admission and as required by service definition	At intake/admission and as required by service definition	At intake/admission and as required by service definition	At intake/admission and as required by service definition	At intake/admission and as required by service definition	At intake/admission and as required by service definition called BPS	State requirement - to identify appropriate services. Upon admission. Records Mgmt Manual - at a frequency "as needed"; "At time of treatment planning" - per MCO Medicaid allows us to bill up to 2 a year
DLA - 20 (daily living activities)	Required for all individuals at first therapy session and update every 90 days	not in use at TA as of 7/29/2021	N/A	N/A	N/A	N/A	N/A	N/A	Required at admission and annually therafter (Alliance & CST only)	N/A	Within first 60 days and every 90 days therafter (Alliance & CST only)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	may need to cross reference the service definitions.
GAD 7 (generalized anxiety disorder)	At CCA and monthly or next appointment if more than a month out. (For anxiety disorder diagnosis)	N/A	N/A		completed at time of crisis assessment.	N/A	Completed during initial assessment (CCA) for everyone. For individuals with a diagnosis of Generalized Anxiety Disorder or other anxiety disorder, it will be completed at the initial individual therapy session. If they score 0-9, reassess in 6 months. If they score 10-21, reassess in 30 days.	up to individual clinician discretion. (at one time this was included, but recently streamlined assessments completed during BHUC admission)	Upon intake and with any CCA reassessments		Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake	Upon intake	Upon intake	Upon intake	Upon intake	N/A	Measurement based standard - TJC?
Homicide/Violence Risk Assessment (CSSRS + People in Crisis Tool)	At CCA and next OP contact if moderate or high risk is indicated.	On admission and per shift	On admission and per shift		completed at time of crisis assessment.	Required at time of psych eval and as indicated at each visit.	At CCA and next OP contact if moderate or high risk is indicated.	At admission at time of BHUC eval	At CCA and whenever ideations are reported		At CCA and whenever ideations are reported	At CCA and whenever ideations are reported	At intake and whenever ideations are reported	At intake and whenever ideations are reported	At intake and whenever ideations are reported	At intake and whenever ideations are reported	At intake and whenever ideations are reported	On Admission and as needed	CTS.02.01.01 - 1. The screening procedure determines the need for immediate intervention to protect the individual served or others. ACTT service definition
IN/At Risk Form	N/A	N/A	N/A		completed at time of crisis assessment.	N/A	N/A	N/A	N/A		N/A	N/A	N/A	N/A	At admission and updated whenever there are changes in status	N/A	N/A	N/A	CTS.02.01.03 - Screenings/assessments are completed per policy & timeframe defined per policy
LECS - Trauma	At Intake (CCA). Completed with any CCA reassessment.	On admission	On admission		completed at time of crisis assessment.	N/A	At registration. If not completed prior, will be completed at time of CCA.Completed with any CCA reassessments.	On admission	Upon intake and with any CCA reassessments		Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with any CCA reassessments	Upon intake and with treatment plan updates	CTS.02.02.05 EP 2 - The organization identifies individuals who may have experienced trauma, abuse, neglect, or exploitation during initial screening and assessment and on an ongoing basis.
LOCUS	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	CTS.02.01.03 - Screenings/assessments are completed per policy & timeframe defined per policy
Medication Reconciliation	At every medical visit	On Admission & at time of discharge	On Admission & at time of discharge		N/A	At every visit	N/A	On admission & at time of discharge	When medications are changed by the provider and after inpatient hospitalizations		N/A	N/A	N/A	N/A	N/A	N/A	N/A	On medications	NPSG.03.06.01 - everytime there is a medication change and individual is being discharged
NCTOPPS	If SUD is primary - At admission, and at 3, 6, 12 months and bi-annually therafter.	N/A	N/A		N/A	N/A	If SUD is primary - At admission, and at 3, 6, 12 months and bi-annually therafter. At discharge.	N/A	At admission, and at 3, 6, 12 months and bi-annually therafter. At discharge.		At admission, and at 3, 6, 12 months and bi-annually therafter. At discharge.	At admission, and at 3, 6, 12 months and bi-annually therafter. At discharge.	N/A	N/A	At admission, and at 3, 6, 12 months and bi-annually therafter. At discharge.	N/A	N/A	N/A	state requirement - initital, 3 mo, 6 months and annually thereafter (substance use disorder, etc)
Nutrition	On intake & annually	On Admission	On Admission		N/A	On intake & annually	On intake & annually	completed during triage	At intake and annually		At intake and annually	At intake and annually	At intake and annually	At intake and annually	At intake and annually	At intake and annually	At intake and annually	At intake and annually	CTS.02.01.11 - 1. The organization screens all individuals served to identify those for whom a nutritional assessment is indicated. At a minimum, the screening includes questions about the following: - Food allergies - Weight loss or gain of 10 pounds or more in the last 3 months
Pain	On intake	On admission and per shift	On admission and per shift		N/A	During initial psych eval & at every visit	During registration - Part of medical profile; completed by RN at time of psych eval	During triage	On intake and with any CCA assessment		On intake and with any CCA assessment	On intake and with any CCA assessment	On intake and with any CCA assessment	On intake and with any CCA assessment	On intake and with any CCA assessment	On intake and with any CCA assessment	On intake and with any CCA assessment	On intake and BPS	CTS.02.01.09 - 1. The organization screens all individuals served to identify those for whom a physical pain assessment is indicated. *NOTE: PSR tracer identified this as a need -SA
PCP	On intake, updated every 90 days.	On admission with CCA	On admission with CCA		N/A	N/A	N/A	N/A	At admission and updates every 6 months, with new plans completed every 364 days		At admission and updates every 6 months, with new plans completed every 364 days	At admission and with any reauthorizations, with new plans completed every 364 days	At admission and with any reauthorizations, with new plans completed every 364 days	N/A	At admission and updates every 6 months, with new plans completed every 364 days	At admission and with any reauthorizations, with new plans completed every 364 days	At admission and updates every 6 months, with new plans completed every 364 days	On Admission	State requirement - initial; then annually thereafter (or if the needs change) CTS.03.01.03 EP1 - The organization develops a plan for care, treatment, or services that reflects the assessed needs, strengths, preferences, and goals of the individual served. CTS.03.01.03 EP 4 - The organization reevaluates and, when necessary, revises the goals and objectives of the plan for care, treatment, or services based on changing

PHQ - 9 (PHQ-9A is used for 11-17 years of age)	At Intake (CCA and monthly thereafter or next session whichever comes first).	On Admission	On Admission: PHQ-9A - Adolescent		completed at time of crisis assessment.	Completed during initial psych eval for everyone. For individuals with diagnosis of Major Depression or dysthymia, it will be completed at initial individual therapy session and if they score 0-9 reassess in 6 months, if they score 10-27, reassess at next visit."	Completed during initial assessment (CCA) for everyone. For individuals with a diagnosis of Major Depressive Disorder or Persistent Depressive Disorder (Dysthymia), it will be completed at the initial individual therapy session. If they score 0-9, reassess in 6 months. If they score 10-27, reassess in 30 days.	N/A	Completed during initial assessment for everyone. For individuals scoring 0-9 reassess in 6 months, for individuals scoring 10 or more reassess in one month		Completed during initial assessment for everyone. For individuals scoring 0-9 reassess in 6 months, for individuals scoring 10 or more reassess in one month	Completed during initial assessment for everyone. For individuals scoring 0-9 reassess in 6 months, for individuals scoring 10 or more reassess in one month	N/A	N/A	N/A	N/A	N/A	N/A	
PSC 17	At CCA and optional thereafter. (Minors age 6-17)	N/A	On admission		N/A	N/A	N/A	N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	CTS.02.01.03 - Screenings/assessments are completed per policy & timeframe defined per policy
Psych Evals	At beginning of services and updates as indicated or when resuming services after individual discharged	On Admission (within 24 hours of admission)	On Admission (within 24 hours of admission)		N/A	At beginning of services and updates as indicated or when resuming services after individual discharged	N/A	BHUC eval completed	at admission and every three years if needed		N/A	N/A	N/A	N/A	N/A	N/A	N/A	At request of student with parents permission at request of parent with student's	physical exam requirements during screening - CTS.02.01.05; CTS.02.01.06; CTS.02.01.07
PSS-3 (suicide screener)	N/A	N/A	N/A		N/A	completed upon each visit; risk assessment as indicated	N/A	N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Risk Assessment (Suicide)	At Intake and next contact if moderate or higher risk level identified at intake.	On admission and per shift	On admission and per shift		completed at time of crisis assessment.	On admission and at every visit	At admission as part of CCA; Completed for all walk-in appointments; If Moderate or Higher Risk identified at intake, then	During BHUC eval	At CCA and whenever ideations are reported		At CCA and whenever ideations are reported	At CCA and whenever ideations are reported	At CCA and whenever ideations are reported	At CCA and whenever ideations are reported	At CCA and whenever ideations are reported	At CCA and whenever ideations are reported	At CCA and whenever ideations are reported	On admission and monthly	CTS 02.01.01 - 1. The screening procedure determines the need for immediate intervention to protect the individual served or others. NPSG 15.01.01.01 EP 2- Screen all individuals served for suicidal ideation using a validated screening tool.
SDOH	At first therapy appt & every 90 days	On admission	N/A		N/A	At first nurse visit & every 6 months	At first therapy appt & every 6 months	at admission	At intake and with every CCA. For Partners MCO- reassessed every 6 months		At intake and reassessed every 6 months	At intake and reassessed every 6 months	At intake and reassessed every 6 months	At intake and reassessed every 6 months	At intake and reassessed every 6 months	At intake and reassessed every 6 months	At intake and reassessed every 6 months	N/A	external referrals in TJC7 (housing, food, domestic abuse, employment, child care)
Treatment Plan	First therapy session and updated every 90 days.	see PCP	see PCP		N/A	N/A	First therapy session and updated every 90 days (or more frequently based on life changes or CCA addendum)	N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	day of admission initial treatment plan complete Master treatmetn plan to be completed 30 days and	State requirement - initial and within first 30 days; then annually thereafter (or if the needs change) CTS.03.01.03 EP1 - The organization develops a plan for care, treatment, or services that reflects the assessed needs, strengths, preferences, and goals of the individual served.
Triage Risk Assessment	N/A	24 hour acute assessment at first point of contact (could be phone or F2F)	24 hour acute assessment at first point of contact (typically via phone or F2F)		N/A	At admission and for walk-ins without appointments	At admission and for walk-ins without appointments	at triage for all individuals	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	State requirement -
URICA	At Intake (CCA and if SUD Dx given) & every 90 days	N/A	N/A		N/A	N/A	N/A	N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	readiness to change related standard
Other documentation																			
Advance Directives																			CTS.04.01.01 - The organization documents whether the adult has a psychiatric State requirement - ask as part of crisis plan
Consent	**Theresa and Lanika working on separate document to clarify expectations and frequency for all consents**																		state requirement - prior to start of service. Technically good until person rescinds. Consent to treat on an annual basis - could be achieved through signature on PCP/treatment plan
Consent to Photo																			Goodale: on admission by parents in enrollment documents
ROI																			Goodale: on admission and as needed as providers or family members are added to treatment goals



Performance Improvement Plan

Monarch

Fiscal Year 2022-2023

Revised: 7/18/2022

Executive Summary

Monarch is committed to the provision of services that maximize the quality of life for each person supported. Monarch believes that a comprehensive performance improvement plan meets our ongoing commitment to achieve system wide best practices to improve outcomes and quality care. Our aim is to ensure that care and services are provided in a safe, effective, person-centered environment. This plan will help provide a consistent process for improving quality of care, increasing satisfaction, and improving safety of the people we support. Performance Improvement (PI) activities and projects will expand across all departments/services and respond to the needs of persons receiving services, staff, and the community.

PI focuses on high-risk, high-volume, systemic trends, and required regulatory issues. Outcomes and processes are identified and measured. The PI process is company-wide and includes a system of information management that analyzes aggregate and comparative data. Using data to analyze performance helps Monarch to identify meaningful improvement goals and to evaluate the effectiveness of improvements.

Purpose and Scope

The purpose of this plan is to outline the planned, systematic, organization-wide approach to quality assessment and continual performance improvement at Monarch. The plan is created annually and approved by the Performance Improvement Committee. Each year the committee approves Performance Improvement projects and goals and tracks the progress of workgroups. These results are routinely communicated back to staff at all levels of the organization as the projects progress.

Mission
Monarch provides hope, promotes wellness, and empowers individuals and families impacted by mental illness, substance use disorders, intellectual and developmental disabilities, and traumatic brain injury.

Vision
Monarch envisions a world where all people can achieve their unique potential.

Values
Integrity: We value ethical and transparent behavior. We believe in honest and open communication that fosters trust and ensures we are accountable to each other and the people we support.

Compassion: We believe in treating all people with basic human kindness, understanding that Monarch is a stronger organization when people are caring and compassionate toward each other.

Respect: We value diversity in all its forms and work to ensure the inclusion of all people. We respect the rights and value the unique contributions of each individual.

Excellence: We are committed to providing exceptional customer service and mission-driven care in a safe, healthy, and respectful environment.

Courage: We believe there is strength in having the courage to try and fail and in asking for help when assistance is needed. We value the ownership of mistakes and support the change and growth that can result.

Innovation: We value learning, changing, and charting the course for better behavioral health care for all. We commit to guiding operational performance through data driven leadership.

Company Organization

Board of Directors and Executive Leadership Team

The commitment to continuous improvement is the goal of every staff and board member at Monarch. The Board of Directors will support and guide the company through directional planning and establishment of the organization's mission/vision. Executive leadership will help achieve this mission/vision through the development of strategic planning. This guidance will help lead and prioritize PI activities.

Executive and Senior leadership will participate in planning, coordinating, and communicating PI initiatives/ results and overall efforts to continuously improve quality of care. Improvement initiatives and data are shared with employees via intranet, company newsletters and staff meetings. Committee meeting minutes and Monarch's annual PI plan is available for employees to access on SharePoint for review. All employees will be responsible for the ongoing and continuous assessment of personal outcomes for those served. Employees are responsible for continuous monitoring of their service delivery processes and communicating ideas/recommendations for improvements.

Performance Improvement Department

The PI Department is led by the Vice President of PI who reports to the Executive Vice President/ Chief Administrative Officer. The PI Department provides a systematic approach to ensuring quality of care and measurement of performance outcomes. Its focus includes improving services through evaluating, monitoring, and analyzing data pertaining to the areas of high-risk, high-frequency and high-cost.

The PI Department encompasses the areas of Clinical Risk Management, Safety, Infection Control, Health Information, Clinical Audits, Quality Management, and company-wide PI. In addition, the department monitors compliance with Joint Commission on Accreditation of Healthcare Organizations (TJC) standards and coordinates TJC surveys and education processes.

The Vice President of PI and Director of PI are responsible for monitoring framework to evaluate the effectiveness of service delivery, identify service gaps/improvement areas, and plans of action that ensure continuity and quality of care.

Performance Improvement (PI) Goals and Objectives

The PI department assists Monarch in meeting performance outcome goals, accreditation, and contract requirements. The goals listed below support a culture of continuous quality improvement.

- To increase the value of services by improving quality and effectiveness in delivery of outcomes in a cost-effective manner.
- To design effective processes to meet the needs of people served and to remain consistent with the company's mission, vision, goals, and plan.
- To collect data that allows problem identification, monitors stability of existing processes, and identifies opportunities/changes that lead to and sustain improvement. This could include, for example,

readmission rates, kept follow-up aftercare appointments, NC TOPPS compliance and identified PI activity outcomes.

- To provide holistic and culturally competent services that focus on the complete needs, dreams, and goals of each individual person.
- To maintain compliance with contractual obligations, national accreditation standards, and state-federal laws and performance expectations.
- To aggregate and analyze data to identify changes needed for improvement of performance and decrease errors.
- To maintain collaboration and communication across Monarch and foster a culture focused on performance improvement.
- To facilitate coordination of care between Monarch and other health care providers and to ensure comprehensive care.
- To ensure treatment and support provided is based on evidence-based, effective practices that minimize risk to those receiving services.

Continuous Quality Improvement

Monarch's PI Committee and leadership help to identify opportunities for improvement. This is accomplished through continuously monitoring, analyzing, and improving workflows/procedures. Quality Assessment is accomplished by ongoing performance management, internal audits/ peer reviews, satisfaction surveys, stakeholder feedback, data analysis and employee input.

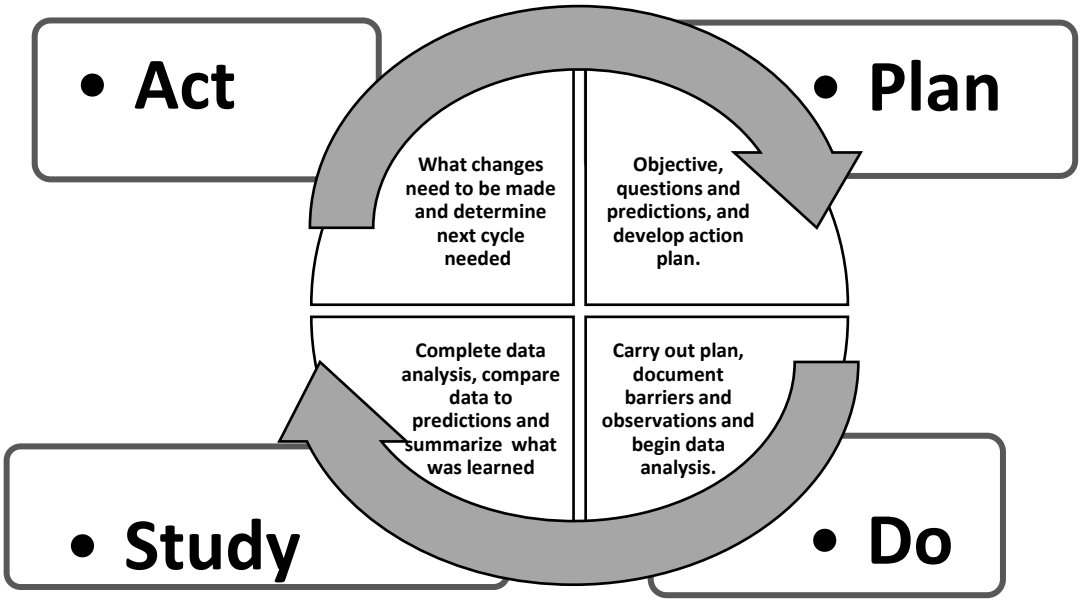
The following internal documents support our continuous improvement efforts and are in SharePoint or Tableau server:

1. Satisfaction Survey Results
2. Complaint-Grievance Data
3. Performance Improvement Plan
4. Credentialing and Staff Training
5. PI Committee Meeting Minutes and Charter
6. Dashboards and Reports
7. Peer Review/ Audits of Medical Records
8. Incident Reports
9. Monarch's Strategic Plan
10. Sub-Committee's meeting minutes and charter

When performance data does not meet expectations or goals, PI activities may be implemented. Each activity follows PI principles to identify the root cause/problem, develop actions to address the cause, monitor for improvements, and sustain the improvement. PI activity needs are identified by any committee in the PIC structure, ELT, or by the Director of PI. The Director of PI will work with the team as needed to identify problems, set goals, establish targeted improvements, assist with data collection and recommend additional interventions.

Monarch utilizes a Plan-Do-Study-Act (PDSA) model for continuous quality improvement. This is supported under the Institute for Healthcare Improvement Model for Improvement (MFI). MFI focuses on three questions

to set the aim or organizational goal, establish measures, and select changes. It incorporates Plan-Do-Study-Act (PDSA) cycles to test changes on a small scale.



Staff Training and Development

Monarch believes strong training is the foundation of our ability to deliver services that improve people's lives. Providing the proper infrastructure to support a robust training program for staff and the people we support is paramount. It is Monarch's policy and goal to ensure each individual employee receives the training needed for quality service provision and personal professional growth that meets the requirements of any regulatory body. Curriculum is developed based on the continued analysis of needs and additional training sessions may be requested at any time.

The Director of Organizational Development, or designee, will develop a training plan, at least annually, to ensure that enough training opportunities are available to meet the needs of employees, supervisors, and regulatory bodies. The required training for each position/service will be evaluated at the initiation of a new position/ service, with any changes in training requirements by outside regulatory agencies and a minimum of every three years. All staff are required to demonstrate required competencies to hold his/her position. Competencies must be reviewed and completed within 60-90 days of hire. Competencies are documented in the individual staff member file in the electronic learning management system.

Performance Improvement Committee (PIC)

PIC will review and analyze ongoing data, and work with the Vice President of PI and Director of PI in the development of the company's annual performance improvement plan. The Director of PI will chair the PIC and the Vice President of PI will be the assigned alternate. The Director will be responsible for reporting activities and the Vice President will make PI recommendations to the Executive Leadership Team. Minutes will be maintained of each meeting to include a minimum of areas reviewed, discussion, recommendations, goals and target dates.

The Director of PI will work with operations and the quality data analyst to track routine performance improvement activities and results and provide recommendations for system improvements. This includes PI project identification, tracking progress and reporting.

The PIC is responsible for:

- Identification, review and approval of PI projects
- Establishment of Evidence-Based Practices (EBP) input/process indicators; and improvement activities.
- Review of monitoring/data results and reporting to evaluate the status achieved toward the indicator/outcome established.
- Development of improvement projects or actions that ensure continual progress on goals.
- Making recommendations to improve company structure, processes, or quality control systems.
- Documentation of all functions.
- Establishment of Quality Focused Teams to implement or evaluate processes.
- Taking all applicable information to assigned service areas and completion of review/improvement actions at a local level.
- Review and designation of MCO submissions of project plans

In addition, indicators that are outlined in the PI plan that directly relate to service delivery will be assessed per the outlined schedule. Information obtained from assessment will be reviewed with each service division's (BH & LTSS) executive team. These leadership teams will share information throughout their services and work to identify opportunities for continual improvement. The Vice President of PI will be responsible for supervision of this PI process, and report findings and follow up as a committee co-chair to the PIC.

The PIC will meet a minimum of four (4) times during the fiscal year. Committee members will be recommended by Executive Leadership Team and members, with final approval made by committee members.

Membership in the Performance Improvement Committee will include representatives from many areas of the agency including Performance Improvement, Quality Management, Nursing, Medical, Information Technology, Human Resources, Finance, Maintenance, Accreditation, and Administration.

Changes will be made, as needed, to accurately reflect all people supported and services provided. PI goals are supported by the PI Workplan and PIC which outlines specific actions to be taken, timelines, and assigned responsibility.

Performance Management and Reporting

The program focus for FY 2022-2023 is based on feedback and assessment by the PI Committee and Executive Leadership Team. Assessment results are utilized to establish indicator and outcome measurement priorities as well as improvement focuses for the organization. Indicators are measurable objective statements related to process and outcomes of treatment. The indicators are used to target the review of outcomes and checked on a regular basis.

Monarch's assessment is comprised of:

- review of previous and future PI goals and data analysis;

- an increased understanding of barriers to performance through focus groups and departmental outreach;
- review of the organization's mission, vision, and values;
- review of the organization's strategic plan;
- review of the ELT's operational plan and priorities;
- internal and external customer satisfaction and feedback;
- evaluation of processes utilized; and
- performance metric results.

PI activities are reviewed by the PI Committee. The PI program is responsible for analyzing each goal and activity per the outlined schedule and developing reporting for presentation of findings. Analysis and reporting will always contain a current and retrospective review of performance for comparison. Analysis will also include, as appropriate, a site/service-based perspective to an aggregate level.

- Findings that are not consistent with the organization's goals and expectations will be considered for PI performance improvement activities, and interventions put in place as needed.
- Indicators will be monitored and reported back to the committee.
- Each department, along with the PI Department will be responsible for reviewing reports, findings, and recommendations with the ELT, and committees within the PIC structure.
- Information reviewed is used to determine potential needs for quality improvement, policy creation and revisions, workflow process changes and workgroup meetings.
- All PI Committee meeting minutes, the PI Plan and reports attached will be posted in SharePoint or on the Tableau Server Dashboard for review.

Sentinel Events

Monarch seeks to proactively identify high-risk processes which could result in an adverse or sentinel event. This identification and priorities are outline in Monarch's Quality Management/ Compliance plan and monitored by the Quality Management Department.

In the event of a sentinel event or near miss as defined in policy, the organization will:

- Ensure the event is reported to all applicable external and internal parties;
- Conduct a root cause analysis of the event; and
- Implement process changes identified in the root analysis to reduce the risk of recurrence.

Disaster Planning

Monarch has implemented disaster recovery and emergency operation plans to outline the process and procedures necessary to support the effective and efficient restoration of critical business operations in the event of a disaster. The intent of the plan is to minimize business disruption and negative impacts with people supported, employees, vendors and the public. Disaster recovery plans are available on SharePoint and shared with staff. Each department is responsible for maintaining and executing disaster procedures pertinent to each program/location.

Disaster Planning is reviewed on hire and annually as part of the orientation and education process. Plan priorities include:

- Personal safety and welfare of Monarch employees and clientele
- Incident command system guidelines and procedures
- Restoration of core business processes and IT systems
- Emergency operations
- Recovery of vital medical and financial records

Confidentiality

Subject to applicable federal, state, and local laws/regulations, PI records, data, and knowledge collected shall be confidential and all persons collecting such data will preserve its confidentiality. Data shall only be accessible to those participating in the PI department/ committee or to an accrediting/licensing agency responsible for insuring the existence of an ongoing and effective PI program.

FY 2022-2023 Proposed Performance Improvement Goals/ Activities

Performance goals address issues critical to people receiving services, staff and Monarch's ability to serve the community. The priority of these goals is determined by the Executive Leadership Team and PI Committee.

The selection of PI goals utilizes the following criteria:

- The goal's relationship to Monarch's mission, vision, values, and strategic plan
- Focus on improving a person's supported experience and treatment outcome
- Building an integrated care delivery system that focuses on the whole person
- Identifying areas of improvement or targeted populations that are:
    - high-risk
    - high-volume
    - systemic trends
    - related to satisfaction
    - related to health and safety
    - related to appropriateness of admission and continued stay
    - related to risk management, and/or
    - destabilizing quality controls/assurance

PI activities may change over time as our priorities and strategies change. Data collection will be based on the availability of resources, data collection and needs of the company. Requirements for data collection imposed by funding sources and legal/regulatory agencies will also be included, when appropriate. All PI activities or projects will include an initial baseline value, creation of a goal measured in the same units and data performance that would be compared against the baseline for marked improvement.

Monarch has identified five specific PI activity areas for FY 2022-2023. With each of the projects below, we will seek to address each aspect of the quadruple aim of healthcare: improved patient outcomes, improved patient experience, lowered cost of healthcare, and provider satisfaction.

The areas below were approved for PI projects in FY 2022-2023:

- Staff Engagement

- Technology Use in LTSS Group Homes
- TMACT Scores for ACTT Programs
- Brand awareness
- Company Management Systems and Processes

Beginning in FY 2022-2023, we plan to launch our Care Management program statewide. In an effort to provide high quality care management services, we will implement a variety of HEDIS clinical quality measures and continue to develop strategies to improve our performance in the following areas:

- Follow-up After Hospitalization for Mental Illness
- Diabetes Screening for People with Schizophrenia or Bipolar Disorder who are using Antipsychotic Medications
- Metabolic Monitoring for Children and Adolescents on Antipsychotics
- Child Wellness Visits
    - Child and Adolescent Well-Care Visit
    - Well-Child Visits in the First 30 Months of Life
- Medical Assistance with Smoking and Tobacco Use Cessation
- Flu Vaccinations for Adults
- Screening for Depression and Follow-up Plan (Children, Adolescents, Adults)

Quality Culture and Beyond

Monarch will continue to work towards a quality culture this year based on continuous improvement, data driven outcomes and increased transparency of targeted improvement efforts.

Contact:

Daniel Daughtridge, MS LMFT
Director of Performance Improvement
Daniel.Daughtridge@monarchnc.org

Monarch Corporate Headquarters
350 Pee Dee Avenue
Albemarle, NC 28001

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
DHS - FY24 Home and Community Care Block Grant Funding Plan

BRIEF SUMMARY:
The FY24 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. 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 ages 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 that the grant will fund.

REQUESTED ACTION:
Motion to approve the FY24 Home and Community Care Block Grant funding plan as submitted by the Home and Community Care Block Grant advisory committee.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Anthony Hodges, Adult and Aging Services Program 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:

- 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, 2023 through June 30, 2024

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

Anthony Hodges, Program Administrator
(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, 2023 through June 30, 2024

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	2,224	$ 82.7245	28	2,225
DHS-Congregate Nutrition	$ -	$ -	$ 136,518	$ 136,518	$ 15,169	$ 151,687	$ 37,600	$ 189,287	13,186	$ 11.5040	300	47,000
DHS-In-Home Aide-Level II - PC	$ -	$ 63,490	$ -	$ 63,490	$ 7,054	$ 70,544	$ -	$ 70,544	3,647	$ 19.3408	12	3,650
DHS-In-Home Aide-Level III - PC	$ -	$ 136,597	$ -	$ 136,597	$ 15,177	$ 151,774	$ -	$ 151,774	6,247	$ 24.2958	22	6,250
DHS-Transportation (General)	$ 90,198	$ -	$ -	$ 90,198	$ 10,022	$ 100,220	$ -	$ 100,220	5,232	$ 19.1552	5,567	108,977
DHS-Transportation (Medical)	$ 144,468	$ -	$ -	$ 144,468	$ 16,052	$ 160,520	$ -	$ 160,520	8,380	$ 19.1551	8,917	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	57,362		15246	286,482

Signature, Chairman, Board of Commissioners Date

State Fiscal Year:	SFY 2023-2024
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-->				$ -	
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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 2023-2024

Fiscal Period: July 2023 through June 2024

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 Shuffler	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						
Amy Ward	Nutrition Site Sup.	$ 32,405	0.7	PART TIME	$ 22,684			$ 22,684						
Beverly Dayvault	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 2023 through June 2024

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	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	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 C 042	**Service** Home Aide-Level III - Personal C 045	**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)	$ 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.Bless II.D)	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Non Match In-Kind (equals line I.Hess 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 2023 through June 2024

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 2023 through June 2024

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 2023 through June 2024

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/patient of 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 program.

4. You have the right to be fully informed in advance of any changes in the care that you may be 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 altering the 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 expect that 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 respected and 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 the 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 Se	0	$ -

State Fiscal Year:	SFY 2023-2024
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-->				$ -	
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 2023-2024

Fiscal Period: July 2023 through June 2024

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	SERVICE 0
K. Strong	Fleet Support Coord	$ 39,250	1	FULL TIME	$ 39,250	$ 39,250								
L Belk	Transportation Clerk	$ 47,424	1	FULL TIME	$ 47,424	$ 47,424								
R Bushey	Transportation Mgr	$ 69,160	1	FULL TIME	$ 69,160	$ 69,160								
D. Irvin	Dispatch	$ 36,088	1	FULL TIME	$ 36,088	$ 36,088								
J Smith	Supervisor	$ 48,651	1	FULL TIME	$ 48,651	$ 48,651								
R Wright	Driver	$ 39,250	1	FULL TIME	$ 39,250		$ 21,587	$ 17,663						
D. Frazier	Supervisor	$ 47,528	1	FULL TIME	$ 47,528	$ 47,528								
G Love	dispatch	$ 37,793	1	FULL TIME	$ 37,793	$ 37,793								
T. Davis	Driver	$ 34,028	0.7	PART TIME	$ 23,820		$ 13,101	$ 10,719						
W. Harrison	Driver	$ 33,675	0.7	PART TIME	$ 23,573		$ 12,965	$ 10,608						
	Driver	$ 32,510	0.7	PART TIME	$ 22,757		$ 12,516	$ 10,241						
C Ratliff	Operations Supervisor	$ 55,910	1	FULL TIME	$ 55,910	$ 55,910								
C Caldwell	Driver	$ 37,398	1	FULL TIME	$ 37,398		$ 20,569	$ 16,829						
G Igo	Driver	$ 34,361	1	FULL TIME	$ 34,361		$ 18,898	$ 15,463						
J Norris	Transportation Clerk	$ 35,193	1	FULL TIME	$ 35,193		$ 19,356	$ 15,837						
D. Kozlowski	Driver	$ 35,090	1	FULL TIME	$ 35,090		$ 19,300	$ 15,790						
J. Robinson	Driver	$ 33,425	1	FULL TIME	$ 33,425		$ 18,384	$ 15,041						
P. Sells	Driver	$ 33,779	1	FULL TIME	$ 33,779		$ 18,578	$ 15,201						
Vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
S Bowles	Driver	$ 34,278	1	FULL TIME	$ 34,278		$ 18,853	$ 15,425						
R Wilson	Transportation Clerk	$ 34,444	1	FULL TIME	$ 34,444		$ 18,944	$ 15,500						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
D Williams	Transportation Clerk	$ 34,216	1	FULL TIME	$ 34,216		$ 18,819	$ 15,397						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
T Carroll	Driver	$ 33,092	1	FULL TIME	$ 33,092		$ 18,201	$ 14,891						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
V. Settles	Driver	$ 33,259	0.7	PART TIME	$ 23,281		$ 12,804	$ 10,477						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
Vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
Vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
Vacant	Driver	$ 31,512	1	FULL TIME	$ 31,512		$ 17,332	$ 14,180						
					$ -									
					$ -									
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					$ -									
				SUBTOTAL FT:	$ 1,207,498	$ 381,804	$ 454,137	$ 371,557	$ -	$ -	$ -	$ -	$ -	$ -
				SUBTOTAL PT:	$ 93,431	$ -	$ 51,386	$ 42,045	$ -	$ -	$ -	$ -	$ -	$ -
				TOTAL	$ 1,300,929	$ 381,804	$ 505,523	$ 413,602	$ -	$ -	$ -	$ -	$ -	$ -
				PERCENT FT:	92.82%	100.00%	89.84%	89.83%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
				PERCENT PT:	7.18%	0.00%	10.16%	10.17%	#DIV/0!	#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 2023 through June 2024

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
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
Staff Salary From Labor Distribution Schedule									
1) Full-time Staff (do not include Title V workers)	$ 1,207,498	$ 381,804	$ 454,137	$ 371,557	$ -	$ -	$ -	$ -	$ -
2) Part-time staff (do not include Title V workers)	$ 93,431	$ -	$ 51,386	$ 42,045	$ -	$ -	$ -	$ -	$ -
A. **Subtotal, Staff Salary**	$ 1,300,929	**$ 381,804**	**$ 505,523**	**$ 413,602**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
Fringe Benefits									
1) FICA @ 7.65 %	$ 99,521	$ 29,208	$ 38,673	$ 31,641	$ -	$ -	$ -	$ -	$ -
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**	$ 559,244	$ 195,790	$ 199,575	$ 163,880	$ -	$ -	$ -	$ -	$ -
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**	**$ 2,494,206**	**#VALUE!**	**$ 1,022,114**	**$ 894,498**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ (331,389)**		**$ (1,065,367)**	**$ 733,978**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
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
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

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 2023 through June 2024

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
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			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
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 2023 through June 2024

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 2023 through June 2024

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/patient of 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 program.

4. You have the right to be fully informed in advance of any changes in the care that you may be 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 altering the 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 expect that 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 respected and 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 the 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
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	-
	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	$	-

State Fiscal Year:	SFY 2023-2024
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	$ -	$ -
					0.0000	$ -	$ -

NC DIVISION OF AGING AND ADULT SERVICES COST OF SERVICES - LABOR DISTRIBUTION SCHEDULE DAAS-732A1

AGENCY NAME: Cabarrus County Planning & Development

State Fiscal Year: SFY 2023-2024

Fiscal Period: July 2023 through June 2024

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	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 2023 through June 2024

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	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) Consumer Contributions	$ 150		$ 150							
2)	$ -									
3)	$ -									
G. **Subtotal, Other Revenues, Non-Match**	$ 150		$ 150	$ -	$ -	$ -	$ -	$ -	$ -	$ -
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)**	$ 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	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	Service	Service	Service	Service	Service	Service	Service
			Housing & Home Improvement	0	0	0	0	0	0	0
			140	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A	#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 2023 through June 2024

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 2023 through June 2024

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 improvements, 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 2023 through June 2024

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/patient of 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 program.

4. You have the right to be fully informed in advance of any changes in the care that you may be 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 altering the 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 expect that 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 respected and 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 the 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 S	0	$	-

State Fiscal Year:	SFY 2023-2024
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 2023-2024

Fiscal Period: July 2023 through June 2024

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	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							
Kotlarz	ALP Program Supervisor	$ 46,800	8%	PART TIME	$ 3,744		$ 3,744							
					$ -									
					$ -									
					$ -	

North Carolina Division of Aging and Adult Services` DAAS-732A

Service Cost Computation Worksheet

Provider: Active Living and Parks
County: Cabarrus
Budget Period: July 2023 through June 2024

	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	Service: 0 #N/A	Service: 0 #N/A
I. Projected Revenues											
A. Fed/State Funding From the Div. of Aging & Adult Svcs.	$ 100,973		$ 100,973	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - Cash											
1) Local Match	$ 11,220		$ 11,220								
2)	$ -										
3)	$ -										
Total Required Minimum Match - Cash	$ 11,220		$ 11,220	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Required Minimum Match - In-Kind											
1)	$ -										
2)	$ -										
3)	$ -										
Total Required Minimum Match - In-Kind	$ -		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
B. Total Required Minimum Match (cash + in-kind)	$ 11,220		$ 11,219	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
C. **Subtotal, Fed/State/Required Match Revenues**	$ 112,193		$ 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**	$ 100		$ 100								
J. **Total Projected Revenues (Sum I.C,D,E,F,G,H, & I)**	$ 112,293		$ 112,292	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -

Division of Aging and Adult Services
Service Cost Computation Worksheet

	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	Service: 0 #N/A	Service: 0 #N/A
II. Line Item Expenses											
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)	$ 15,099	$ -	$ 15,099	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
A. **Subtotal, Staff Salary**	$ 15,099	$ -	$ 15,099	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Fringe Benefits											
1) FICA @ 7.65 %	$ 1,155	$ -	$ 1,155	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
2) Health Insurance	$ -										
3) Retirement	$ -										
4) Unemployment Insurance	$ -										
5) Worker's Compensation	$ -										
6) Other	$ -										
B. **Subtotal, Fringe Benefits**	$ 1,155	$ -	$ 1,155	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
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) Program Supplies	$ 5,000		$ 5,000								
2) Marketing Materials	$ 2,500		$ 2,500								
3) Bocce Court CEP	$ 89,042		$ 89,042								
4)	$ -										
5)	$ -										
6)	$ -										
7)	$ -										
8)	$ -										
F. **Subtotal, General Operating Expenses**	$ 96,542	$ -	$ 96,542	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
G. **Subtotal, Other Administrative Cost Not Allocated in Lines II.A through E**	$ -										
H. **Total Proj. Expenses Prior to Admin. Distribution**	**$ 112,796**	**$ -**	**$ 112,796**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ 504**		**$ 504**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
J. **Total Proj. Expenses After Admin. Distribution**	**$ 112,292**		**$ 112,292**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**

vices Must Equal

	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	Service: 0 #N/A	Service: 0 #N/A
III. Computation of Rates											
A. **Computation of Unit Cost Rate:**											
1. Total Expenses (equals line II.J)	$ 112,292		$ 112,292	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
2. Total Projected Units											
3. Total Unit Cost Rate			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
B. **Computation of Reimbursement Rate:**											
1. Total Revenues (equals line I.J)	$ 112,293		$ 112,292	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
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	$ 112,293		$ 112,292	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
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

331 Corban Ave SE

Concord, NC 28025

County Funding Plan

Provider Services Summary

DAAS-732

County: Cabarrus

Budget Period: July 2023 through June 2024

Revision #: 1 **Date:** 5/17/2022

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			$ -	$ -	$ 100,973	$ 100,973	$ 11,219	$ 112,192	$ -	$ 112,192	-	$ -		-
0			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -

DAAS-733
(Rev. 2/19)

Home and Community Care Block Grant for Older Adults
Outreach Methodology

July 2023 through June 2024

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 2023 through June 2024

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)

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: Active Living and Parks

Name of Agency Administrator: Londa Strong, Director

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/patient of 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 program.

4. You have the right to be fully informed in advance of any changes in the care that you may be 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 altering the 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 expect that 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 respected and 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 the 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

Senior Center Operation		Match Totals Do Not Match Difference Is--->	Difference (1)
	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 S	0	$	-

State Fiscal Year:	SFY 2023-2024
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-->				$ -	
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	$ -	$ -

NC DIVISION OF AGING AND ADULT SERVICES COST OF SERVICES - LABOR DISTRIBUTION SCHEDULE DAAS-732A1

AGENCY NAME: Cabarrus Meals on Wheels

State Fiscal Year: SFY 2023-2024

Fiscal Period: July 2023 through June 2024

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 2023 through June 2024

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	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	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	$ 112,221	$ 15,000	$ 97,221					
2) utilities phone	$ 36,000	$ 18,000	$ 18,000					
3) food/trays	$ 500,000		$ 400,000	$ 100,000				
4) audit/legal	$ 17,000	$ 17,000						
5) insurance	$ 20,000	$ 20,000						
6)	$ -							
7) other payroll	$ 200,000	$ 200,000						
8) other expenses	$ 235,091	$ 2,956	$ 202,000	$ 30,135				
F. **Subtotal, General Operating Expenses**	$ 1,120,312	$ 272,956	$ 717,221	$ 130,135	$ -	$ -	$ -	$ -
G. **Subtotal, Other Administrative Cost Not Allocated in Lines II.A through E**	$ -							
H. **Total Proj. Expenses Prior to Admin. Distribution**	**$ 1,420,080**	**$ 324,090**	**$ 895,991**	**$ 200,000**	**$ -**	**$ -**	**$ -**	**$ -**
I. **Distribution of Admininistrative Cost**	**$ (1)**		**$ (0)**	**$ (0)**	**$ -**	**$ -**	**$ -**	**$ -**
J. **Total Proj. Expenses After Admin. Distribution**	**$ 1,095,991**		**$ 895,991**	**$ 200,000**	**$ -**	**$ -**	**$ -**	**$ -**

		Service	**Service**	**Service**	**Service**	**Service**	**Service**
	Grand	Home Delivered Meals	e Delivered Meals NSIP Reimburse	0	0	0	0
III. Computation of Rates	**Total**	020	021	#N/A	#N/A	#N/A	#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

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 2023 through June 2024
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			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	-	$ -		-
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.

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 2023 through June 2024

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 2023 through June 2024

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.

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 Meals on Wheels

Name of Agency Administrator: Kimberly Strong

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/patient of 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 program.

4. You have the right to be fully informed in advance of any changes in the care that you may be 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 altering the 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 expect that 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 respected and 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 the 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 S	0	$	-

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Finance - Budget Amendment Ambulance Fees and EMS | MC billing service fees

BRIEF SUMMARY:
Emergency Management Services (EMS) uses EMS Management and Consultants (EMSMC) an ambulance billing services company for medical billing and collection services. EMS pays EMSMC on a monthly basis 8.36% of net collections and $11.50 per claim for NC Medicaid Managed Care claims. Average net collections for this fiscal year are higher than expected. Therefore, a budget amendment is needed to increase revenues for the increase in collections and expenditures for fees associated with billing and collections of claims.

REQUESTED ACTION:
Motion to approve the budget amendment to increase revenues for ambulance fees and expenditures for billing and collection services.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
James Howden, Finance 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: June 19, 2023 **Amount:** 100,000.00

Dept. Head: James Howden, Finance **Department:** Emergency Management Service

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

Emergency Management Services (EMS) uses EMS Management and Consultants (EMSMC) an ambulance billing services company for medical billing and collection services. EMS pays EMSMC on a monthly basis 8.36% of net collections and $11.50 per claim for NC Medicaid Managed Care claims. Average net collections for this fiscal year are higher than expected. This budget amendment increases revenues for the increase in collections and expenditures for the fees associated with billing and collections of claims.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	6	2730-6613	AMBUANCE FEES	6,700,000.00	50,000.00	-	6,750,000.00
001	6	2730-6613-IFAC	AMBULANCE FESS -INTER-FACILITY	240,000.00	50,000.00	-	290,000.00
001	9	2730-9445	PURCHASED SERVICES	617,812.00	100,000.00	-	717,812.00

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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Finance - Cabarrus County Schools Health Sciences Institute

BRIEF SUMMARY:
The Cabarrus Health Science Institute (CHSI) will be the 3rd Early College Program within the district. The program started in the 2022/2023 school calendar year is a temporary facility for the first 2 years. This project will provide the CHSI Program a permanent home intentionally built beside the existing Cabarrus College of Health Science that is a part of the Atrium Partnership with Cabarrus County Schools.

Due to the program and number of students served, a permanent facility is needed. The work required for temporary spaces in the existing facility for FY24 as well as design and development work for a permanent site to open in the 24/25 school calendar year needs to begin this year.

REQUESTED ACTION:
Motion to approve the budget amendment to fund renovations and design and development of the new Cabarrus Health Science Institution Campus and approve the Schools Capital Project Fund budget ordinance.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
James Howden, Finance 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
- Project Ordinance

Budget Revision/Amendment Request

Date: 6/19/2023 **Amount:** 2,000,000

Dept. Head: James Howden **Department:** Finance

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

TRUE

To Budget Renovations and New Modular Campus for the Cabarrus Health Science Institution. Budget from Community Investment Fund fund balance.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
390	6	7210-6932-CHSI	Contribution from CIF	-	2,000,000		2,000,000
390	9	7210-9821-CHSI	Building and Renovations	-	2,000,000		2,000,000
100	6	0000-6901	Fund Balance Appropriations	19,179,436	2,000,000		21,179,436
100	9	0000-9708	Contribution to Capital Project Fund	32,511,612	2,000,000		34,511,612

Budget Officer

☐ Approved
☐ Denied

_____
Signature

_____
Date

County Manager

☐ Approved
☐ Denied

_____
Signature

_____
Date

Board of Commissioners

☐ Approved
☐ Denied

_____
Signature

_____
Date

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	$ 43,054,810
Contribution from Capital Projects Fund	9,383,614
Debt Proceeds 2020 Draw Note	46,620,222
Debt Proceeds 2022 Draw Note	55,711,930
Debt Proceeds 2024 Draw Note	73,466,750
Contribution from Capital Reserve Fund	693,429
Contribution from Convention & Visitors Bureau	1,550,000
NC Department of Transportation	1,950,000
TOTAL REVENUES	**$232,430,755**

C. The following appropriations are made as listed.

CCS Mobile Unit Renovation	$ 3,300,000
R. Brown McAllister Replacement	48,356,750
Roberta Road Middle School	56,604,300
CCS New High School	9,508,821
CCS Southeast High School – Land purchase	1,816,320
Contribution to Capital Reserve	5,001,114
Early College Mobile Units	2,337,000
Mondo Track – JM Robinson High School	1,550,000
Deferred Maintenance Cabarrus County Schools	25,463,416
Deferred Maintenance Kannapolis City School	5,640,034
Deferred Maintenance Rowan Cabarrus Community College	3,468,000
Mary Frances Wall Renovations	11,000,000
Central Cabarrus High School HVAC	9,000,000
Concord High School HVAC	9,000,000
Opportunity School	7,000,000
Hickory Ridge High School Roof	2,550,000
Cox Mill Elementary School Roof	2,500,000
Wolf Meadow Elementary School Roof	2,000,000
Fred L. Wilson Elementary School Addition	12,000,000
Forest Park Elementary School HVAC	7,000,000
RCCC South Campus HVAC	5,335,000
Cabarrus Health Science Institution	2,000,000

TOTAL EXPENDITURES	**$232,430,755**
GRAND TOTAL – REVENUES	**$232,430,755**
GRAND TOTAL – EXPENDITURES	**$232,430,755**

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.

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 5th day of June 2023.

CABARRUS COUNTY BOARD OF COMMISSIONERS

BY: _____
Stephen M. Morris, Chairman

ATTEST:

_____
Clerk to the Board

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Finance - Governmental Accounting Standards Board (GASB) 87 Budget Amendment

BRIEF SUMMARY:
In June 2017, Governmental Accounting Standards Board (GASB) issued Statement No. 87, Leases. GASB 87 established a single model for lease accounting based on the principal that leases are financing of the "right to use" an asset, which is an underlying nonfinancial intangible asset, rather than an asset itself. Governments are required to amortize the non-financial assets over the shorter of the asset's useful life or the lease term.

In Fiscal Year 2022, Cabarrus County began recording all leases within the scope of GASB 87 and established a capitalization threshold of $100,000, in total lease payments over the lease term.

With the implementation of GASB 87, all lease payments that fall within the materiality threshold should be budgeted and accounted for as debt service principal and interest payments.

Finance prepares a budget amendment at fiscal year end to budget principal and interest payments for "right to use" assets in the Community Investment Fund (CIF). Actual expenditures were paid out of the general fund throughout the fiscal year and will be moved to the debt service principal and interest accounts in CIF for reporting purposes.

REQUESTED ACTION:
Approve the necessary budget amendment to budget and account for debt service principal and interest expenditures as required by Lessee Accounting under Governmental Accounting Standards Board (GASB) Statement No. 87.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
James Howden, Finance 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: June 19, 2023 **Amount:** 1,169,548.00

Dept. Head: James Howden - Finance **Department:** Finance

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

This budget amendment is to budget principal and interest payments for lease payments made in FY 2023 as a result of implementing GASB 87. The budget amendment budgets principal and interest payments in the Community Investment Fund (CIF) and appropriates fund balance. Actual expenditures (lease payments) were paid out of the general fund and will be moved to the principal and interest accounts in CIF. The overall effect on fund balance is zero.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
100	6	0000-6901	Fund Balance Appropriated	21,179,436.00	1,169,548.00	-	22,348,984.00
100	9	9120-991302-G87	LEASE FINANCING PRINCIPAL - G87	-	901,379.00	-	901,379.00
100	9	9120-993201-G87	LEASE INTEREST	-	12,787.00	-	12,787.00
			To budget GASB 87 implementation for DHS building lease principal and interest payments				
100	9	9120-991302-G87	LEASE FINANCING PRINCIPAL - G87	-	114,804.00	-	114,804.00
100	9	9120-993201-G87	LEASE INTEREST	-	517.00	-	517.00
			To budget GASB 87 implementation for copier lease principal and interest payments				
100	9	9120-991302-G87	LEASE FINANCING PRINCIPAL - G87	-	16,896.00	-	16,896.00
100	9	9120-993201-G87	LEASE INTEREST	-	1,365.00	-	1,365.00
			To budget GASB 87 implementation for The Old Creamery lease principal and interest payments				
100	9	9120-991302-G87	LEASE FINANCING PRINCIPAL - G87	-	120,814.00	-	120,814.00
100	9	9120-993201-G87	LEASE INTEREST	-	986.00	-	986.00
			To budget GASB 87 implementation for HPE equipment and HP switches lease principal and interest payments				

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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Finance - Government Accounting Standards Board (GASB) 96

BRIEF SUMMARY:
The Government Accounting Standards Board (GASB) issued Statement No. 96, Subscription Based Information Technology Arrangements (SBITAs) in May 2020. The statement defines a SBITA as "a contract that conveys the right to use another party's information (IT) software, alone or in combination with tangible assets as specified in the contract. As with GASB Statement No. 87, Leases, this means that the County is procuring an intangible asset, mainly a "right to use" asset and should be amortized over the shorter of the subscription term or the useful life. Subscription payments will be recognized and budgeted for like principal and interest debt service payments made on long term debt.
Under the Generally Accepted Accounting Principals (GAAP) basis for governmental funds and the budgetary basis for all budgeted funds in NC, Cabarrus County will initially recognize an expenditure and other financing source. Assets which are clearly immaterial to the financial statements will not be included for GASB 96 reporting purposes. Cabarrus County will record SBITA's within the scope of GASB 96 that exceed an established capitalization threshold, or materiality. The capitalization threshold is defined as $100,000 in total payments over the subscription term.

REQUESTED ACTION:
Motion to adopt the resolution to establish the materiality threshold and approve the budget amendment.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
James M. Howden, Finance 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
- Resolution

Budget Revision/Amendment Request

Date: June 19, 2023 **Amount:** 1,574,000.00

Dept. Head: James Howden - Finance **Department:** Finance

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

This budget amendment is to budget principal and interest payments for Subscription-Based Information Technology Arrangements (SBITA's) as a result of implementing GASB 96. The budget amendment budgets principal and interest payments in the Community Investment Fund (CIF) and appropriates fund balance. Actual expenditures (SBITS's) were paid out of the general fund and will be moved to the principal and interest accounts in CIF. This budget amendment also budget initial expenditures and other financing source to record inception of SBITA's.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
100	6	9120-690501-G96	PROCEEDS FROM SBITA - Other Financing Source	-	1,215,000.00	-	1,215,000.00
100	9	9120-9865-G96	CAPITAL OUTLAY - G96	-	1,215,000.00	-	1,215,000.00
			To budget expenditure (subscription asset) and other financing source for GASB 96 implementation.				
100	6	0000-6901	Fund Balance appropriated	22,348,984.00	359,000.00	-	22,707,984.00
100	9	9120-991303-G96	PRINCIPAL GASB 96	-	350,500.00	-	350,500.00
100	9	9120-993202-G96	INTEREST GASB 96	-	8,500.00	-	8,500.00
			To budget principal and interest payments for GASB 96 implementation				

Budget Officer

☐ Approved

☐ Denied

Signature _____

_____

Date

County Manager

☐ Approved

☐ Denied

Signature _____

_____

Date

Board of Commissioners

☐ Approved

☐ Denied

Signature _____

_____

Date

Resolution To Establish Materiality Threshold for Recognition Of
Subscription-Based Information Technology Arrangements ("SBITAs")
Under GASB Statement No. 96

WHEREAS, General Accounting Standards Board ("GASB") Statement No. 96 provides guidance on the accounting and financial reporting for subscription-based information technology arrangements ("SBITAs"); and

WHEREAS, a SBITA is defined as a contract that conveys control of the right to use another party's information technology (IT) software, alone or in combination with a tangible capital asset, as specified in the contract for a defined period of time (a "subscription term"); and

WHEREAS, under GASB Statement No. 96, a government entity generally should recognize a right-to-use subscription *asset*, and a corresponding subscription *liability*; and

WHEREAS, for certain IT subscriptions, either the initial price or present value of future subscription payments will be immaterial to the total value of the County's SBITA assets and liabilities; and

WHEREAS, after review of the IT subscription contracts currently in place, county staff believes that a materiality threshold of $100,000 is reasonable with respect to compliance with GASB Statement No. 96, as that figure represents less than 1% of total capital assets, less than 8% of the current value of IT subscription contracts and is consistent with GASB 87 materiality.

NOW, THEREFORE, BE IT RESOLVED that the Cabarrus County Board of Commissioners hereby adopts $100,000 as the materiality threshold for subscription-based information technology arrangement (SBITAs) when determining whether to recognize such subscriptions as assets, and the cost related to same as liabilities, in compliance with GASB Statement No. 96.

BE IT FURTHER RESOLVED that the Board, upon the recommendation of the County Manager or the County Finance Director, may adjust the materiality threshold from time to time as may be needed or recommended for audit purposes.

Adopted this 19th day of June 2023.

_____
Stephen M. Morris, Chairman
Cabarrus County Board of Commissioners

Attest:

_____
Clerk to the Board

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Finance - Health Insurance Fund Balance Budget Amendment

BRIEF SUMMARY:
The Finance Department annually reviews revenues and expenditures for the Health Insurance Internal Service Fund based on actual activity and estimated activity for the remainder of the fiscal year. Based on this analysis, a budget amendment has been prepared to ensure claims expenditures do not exceed the budget at fiscal year end. This budget amendment appropriates fund balance and increases the budget for health insurance claims.

REQUESTED ACTION:
Motion to adopt the budget amendment.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Jim Howden, Finance 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

Date: June 19, 2023 **Amount:** 320,000.00

Dept. Head: James Howden - Finance **Department:** Fund 610 - Health Insurance - ISF

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

This budget amendment is to increase the budget for health insurance claims in the Health Insurance Internal Service Fund. The total budget for claims is being increased based on higher than average claims for the last two months of the fiscal year. This budget amendment appropriates fund balance.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
610	6	1917-6901	FUND BALANCE APPROPRIATED	22,240.60	320,000.00	-	342,240.60
610	9	1917-9645	HEALTH INSURANCE CLAIMS	14,251,792.00	320,000.00	-	14,571,792.00

Total 0.00

Budget Officer	County Manager	Board of Commissioners
Approved	Approved	Approved
Denied	Denied	Denied
_____ *Signature*	_____ *Signature*	_____ *Signature*
_____ *Date*	_____ *Date*	_____ *Date*

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Finance - Opioid Abatement Funding

BRIEF SUMMARY:
Cabarrus County has been awarded Opioid Abatement Funding. Per an agreement between Partners Health Care Management and Cabarrus County, Partners Health Care Management will reimburse Cabarrus County for activities and services listed in the agreement. The County will pay Cabarrus Health Alliance for these services and activities. The funding amount is $91,514 and there is no County match. The grant period ends June 30, 2023. All expenditures for services and activities as of June 30, 2023 and a report describing utilization of the funds is due by July 05, 2023.

REQUESTED ACTION:
Motion to approve the budget amendment to budget revenues and expenditures for Opioid Abatement Funding.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Jim Howden, Finance 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
- Contract

Budget Revision/Amendment Request

Date: JUNE 19, 2023 **Amount:** 91,514.00

Dept. Head: JAMES HOWDEN - FINANCE **Department:** OTHER HUMAN SERVICES

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

This budget amendment is to budget revenues and expenditures for OPIOID Abatement Funding awarded to Cabarrus County. An agreement has been made between the Partners Health Management (Local Managed Entity | Managed Care Organization) and Cabarrus County. Partners Health Care Management will reimburse Cabarrus County for the following activities and services listed in the agreement: purchase of Narcan, Fentanyl Strips and targeted messaging campaign activities. The County will pay Cabarrus Health Alliance for these activities and services. The amount of the award is $91,514 and there is no County match. The grant period ends June 30, 2023.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	6	5910-625901	LME | MCO Grant Award	-	91,514.00	-	91,514.00
001	9	5910-9705-OPIOD	Public Health Authority - OPIOID	-	91,514.00	-	91,514.00

Budget Officer

☐ Approved

☐ Denied

Signature _____

_____

Date

County Manager

☐ Approved

☐ Denied

Signature _____

_____

Date

Board of Commissioners

☐ Approved

☐ Denied

Signature _____

_____

Date

DocuSign Envelope ID: F9B647DC-5840-4365-B43B-392CFF307C48

CONTRACT
BETWEEN

PARTNERS HEALTH MANAGEMENT
Area Authority/LME-MCO
AND
COUNTY OF CABARRUS
A PROVIDER OF MH/DD/SA SERVICES

THIS CONTRACT is made between Partners Health Management, Area Authority/LME-MCO (herein known as the "LME"), and **COUNTY OF CABARRUS** (herein known as the "Provider"), operating under the laws of North Carolina. By means of this Contract, the Local Management Entity is establishing a relationship with Provider(s) who are reimbursed for activities and/or services as listed below.

This Contract is effective July 1, 2022 through June 30, 2023

Article I
General Terms and Conditions

NOW, THEREFORE, the LME and the Provider herein are referred to as the "Parties", and agree as follows:

1. **Nonproprietary information**. The Provider shall not publish or disseminate any advertising or proprietary business material either printed or electronically transmitted (including photographs, films, and public announcements) or any business papers and documents which identify the LME or its facilities without the prior written consent of the LME. Any documents, reports, or other products, with the exception of any and all proprietary business papers and documents, developed in connection with the performance of the Contract, shall be in the public domain and shall not be copyrighted or marketed for profit by the Provider, any consumer, or other entity.

2. **Confidentiality**. The Provider shall protect the confidentiality of any and all items relating to this contractual agreement.

3. **Dispute Resolution**. The parties shall attempt to resolve any disagreement between them before resorting to legal process.

4. **Invalid Provisions**. If any term, provision, or condition of this Agreement is found to be illegal, void, or unenforceable to a court of competent jurisdiction, the rest of this Agreement shall remain in full force and effect. The invalidity or unenforceability of any term or provision hereof shall in no way affect the validity or enforceability of any other term or provision.

5. **Hold Harmless**. To the extent permitted by law, both contracting parties and their agents, servants and employees agrees to hold the other contracting party and its agents, servants and employees harmless from and against any and all claims, expenses (including attorney fees), costs or liability for acts or omissions. If this agreement is terminated, the rights and obligations of the

parties under this agreement shall survive the termination of the agreement regarding any liability for acts or omissions that occurred prior to the termination.

6. **Independent Contractor**. This agreement is not intended and shall not be construed to create the relationship of agent, servant, employee, partnership, joint venture, or association between the contracting parties, their employees, partners, or agents. This independent contractor relationship shall not preclude the Provider from utilizing the service contracts for provision of professional services under this Contract in place of employment contracts. The Provider shall provide an up to date W-9 each Fiscal Year. The Provider shall assume responsibility of any and all personal and business taxes and will be issued a 1099 form annually.

7. **Mergers and Name Changes**. Each shall inform the other party in writing regarding any merger, name change, or change in ownership or control. This change may necessitate an amendment to the agreement.

8. **Applicable Law.** The laws of the State of North Carolina shall govern this agreement.

9. **Subcontracting.** This contract may not be subcontracted without prior written consent from the LME.

Article II
Termination

This contract may be terminated prior to the end date upon any of the following events:

1. **Mutual Agreement.** This contract may be terminated at any time by mutual consent of both parties or 30 days after one of the contracting parties gives notice of termination.

2. **Funding Reduction.** This contract may be terminated in the event the funding mechanism, whether state, county of federal, is withdrawn, in part or in whole at the option of the LME with 30 days written notice to the Provider.

3. **Cause Termination**.

a) The LME may immediately terminate this Contract for cause. The cause for termination shall be documented in writing and presented to the Provider detailing the grounds for termination.

b) The LME may terminate this Contract at its discretion if Provider is acquired, merged or experiences a change in ownership or control.

c) The Provider may terminate this Contract upon breach of contract terms by the LME and upon 30 days written notice to the LME.

Article III
Contract Responsibility

1. **Notice.** Either Party may at any time change its address for notification purposes by mailing a notice to the other Party at the address designated by that Party. The new address shall be effective

on the date specified in such notice, or if no date is specified, on the tenth (10th) day following the date such notice is received.

2. Entire Agreement. This contract contains the entire agreement of the parties and there are no representations, inducements or other provisions other than those expressed in writing herein. All changes, additions or deletions must be in writing and signed by both parties.

IN WITNESS WHEREOF, the Parties have caused this Contract to be executed in multiple copies, each of which shall be deemed an original, as the act of said Party; and each Party will retain a fully executed copy. Each individual signing below warrants he/she is duly authorized by the Party to sign this Contract and to bind the Party to the terms and conditions of this Contract.

Provider Name: COUNTY OF CABARRUS

Address: 65 Church Street PO Box 707 Concord, NC 28025

Phone: 704-920-2139

Provider's Federal ID: 56-6000281

DocuSigned by:
Mike Downs
252D82E96C2D460...

5/1/2023 | 6:25 AM PDT

PROVIDER AUTHORIZED SIGNATURE **DATE**

Mike Downs — County Manager

PRINTED NAME **TITLE**

Partners Health Management
901 S. New Hope Road
Gastonia, NC 28054

DocuSigned by:
W. Rhett Melton
AB2EAD60736E4A4...

5/5/2023 | 1:11 PM EDT

CHIEF EXECUTIVE OFFICER **DATE**

Per G.S. 159-28, this instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

DocuSigned by:
Susan Davis Lackey
0A97C2CBDFF8483...

4/18/2023 | 12:11 PM EDT

CHIEF FINANCIAL OFFICER **DATE**

Attachment A
REIMBURSEMENT SCHEDULE FOR SERVICES

COUNTY OF CABARRUS

Funding Term: Effective July 1, 2022 **through** June 30, 2023

1. **Services to be Provided**: Cabarrus County has been awarded $91,514 in Opioid Abatement Funding to purchase Nasal Narcan, Fentanyl Test Strips, and to support a county-wide messaging campaign to raise awareness of local and national resources to access treatment, as well as where to access free naloxone. Narcan/Naloxone and Fentanyl Test Strips will be utilized for the Narcan vending machine and distributed to other community agencies. Distribution sites in Cabarrus County include but are not limited to Cabarrus Health Alliance, Opportunity House, Salvation Army, Daymark Recovery Services, EMS, School Nurses, and others.

Purpose	Amount
	07/01/2022 - 06/30/2023
Nasal Narcan	72,744.00
Fentanyl Test Strips	14,270.00
Targeted Messaging Campaign	4,500.00
	91,514.00

Invoices should include receipts or documentation for the purchase of items needed for the project.

A report describing utilization of these funds is due with the final invoice/receipts by **July 5, 2023**, and should be sent to nonucr@partnersbhm.org

2. **Reimbursement**: **The maximum amount to be reimbursed for term above is $91,514.00.** Partners Health Management will pay contract provider upon receipt of an appropriate invoice and backup documentation (as applicable and required as noted above). Invoices are normally processed within thirty days of receipt.

3. **Submission of Invoices**: The Provider shall submit the monthly invoice no later than 30 days after services has occurred.

4. **Funding Source:** Allocation 23-PA-41 = $91,514.00

- **MAIL INVOICES TO:** **Partners Health Management**
  901 S. New Hope Road
  Gastonia, NC 28054
  Attn: Finance – NonUCR Billing
  Email: nonucr@partnersbhm.org

It is understood and agreed by Provider that any agreements by LME to pay any amounts to Provider on any basis other than fee-for-service, are applicable solely to the contract period, and that such payments shall not obligate LME to fund Provider in a manner other than on a fee-for-services basis in this Contract or any future Contracts

ATTACHMENT B

PARTNERS HEALTH MANAGEMENT
BUSINESS ASSOCIATE ADDENDUM

This Agreement is made effective July 1, 2022 by and between Partners Health Management ("Covered Entity") and **COUNTY OF CABARRUS**. ("Business Associate"), (collectively the "Parties").

1. BACKGROUND

a. Covered Entity and Business Associate are parties to one or more contracts ("Contract(s)") whereby Business Associate agrees to perform certain services for or on behalf of Covered Entity.
b. Covered Entity is an organizational unit of the North Carolina Department of Health and Human Services (the "Department") that has been designated in whole or in part by the Department as a health care component for purposes of the HIPAA Privacy and Security Rules.
c. The relationship between Covered Entity and Business Associate is such that the Parties believe Business Associate is or may be a "business associate" within the meaning of the HIPAA Privacy and Security Rules.
d. The Parties enter into this Business Associate Addendum to the Contract(s) with the intention of complying with the HIPAA Privacy and Security Rules provision that a covered entity may disclose protected health information to a business associate, and may allow a business associate to create or receive protected heath information on its behalf, if the covered entity obtains satisfactory assurances that the business associate will appropriately safeguard the information.

2. DEFINITIONS

Unless some other meaning is clearly indicated by the context, the following terms shall have the following meaning in this Agreement:

a. "Electronic Protected Health Information" shall have the same meaning as the term "electronic protected health information" in 45 C.F.R. § 160.103.
b. "HIPAA" means the Administrative Simplification Provisions, Sections 261 through 264, of the federal Health Insurance Portability and Accountability Act of 1996, Public Law 104-191, as modified and amended by the Health Information Technology for Economic and Clinical Health ("HITECH") Act, Title XIII of Division A and Title IV of Division B of the American Recovery and Reinvestment Act of 2009, Public Law 111-5.
c. "Individual" shall have the same meaning as the term "individual" in 45 C.F.R. § 160.103 and shall include a person who qualifies as a personal representative in accordance with 45 C.F.R. § 164.502(g).
d. "Privacy and Security Rules" shall mean the Standards for Privacy of Individually Identifiable Health Information and the Security Standard for the Protection of electronic Protected Health information set out at 45 C.F.R. Parts 160 and 164.
e. "Protected Health Information" shall have the same meaning as the term "protected health

information" in 45 C.F.R. § 160.103, limited to the information created or received by Business Associate from or on behalf of Covered Entity.

f. "Required By Law" shall have the same meaning as the term "required by law" in 45 C.F.R. § 164.103.
g. "Secretary" shall mean the Secretary of the United States Department of Health and Human Services or the person to whom the authority involved has been delegated.
h. Unless otherwise defined in this Agreement, terms used herein shall have the same meaning as those terms have in the Privacy and Security Rules.

3. **OBLIGATIONS OF BUSINESS ASSOCIATE**

a. Business Associate agrees to not use or disclose Protected Health Information other than as permitted or required by this Agreement or as Required by Law.
b. Business Associate agrees to use appropriate safeguards and comply, where applicable, with subpart C of 45 C.F.R. Part 164 with respect to electronic protected health information, to prevent use or disclosure of the Protected Health Information other than as provided for by this Agreement.
c. Business Associate agrees to mitigate, to the extent practicable, any harmful effect that is known to Business Associate of a use or disclosure of Protected Health Information by Business Associate in violation of the requirements of this Agreement.
d. Business Associate agrees to report to Covered Entity any use or disclosure of the Protected Health Information not provided for by this Agreement of which it becomes aware, including breaches of unsecured protected health information as required by 45 C.F.R. § 164.410.
e. Business Associate agrees, in accordance with 45 C.F.R. § 164.502(e)(1) and § 164.308(b)(2), to ensure that any subcontractors that create, receive, maintain, or transmit protected health information on behalf of Business Associate agree to the same restrictions and conditions that apply to Business Associate with respect to such information.
f. Business Associate agrees to make available protected health information as necessary to satisfy Covered Entity's obligations in accordance with 45 C.F.R. § 164.524
g. Business Associate agrees to make available Protected Health Information for amendment and incorporate any amendment(s) to Protected Health Information in accordance with 45 C.F.R. § 164.526.
h. Unless otherwise prohibited by law, Business Associate agrees to make internal practices, books, and records relating to the use and disclosure of Protected Health Information received from, or created or received by Business Associate on behalf of, Covered Entity available to the Secretary for purposes of the Secretary determining Covered Entity's compliance with the Privacy and Security Rules.
i. Business Associate agrees to make available the information required to provide an accounting of disclosures of Protected Health Information in accordance with 45 C.F.R. § 164.528.

4. PERMITTED USES AND DISCLOSURES

a. Except as otherwise limited in this Agreement or by other applicable law or agreement, if the Contract(s) permit(s), Business Associate may use or disclose Protected Health Information to perform functions, activities, or services for, or on behalf of, Covered Entity as specified in the Contract(s), provided that such use or disclosure:
    1) would not violate the Privacy and Security Rules if done by Covered Entity; or
    2) would not violate the minimum necessary policies and procedures of the Covered Entity.

b. Except as otherwise limited in this Agreement or by other applicable law or agreements, if the Contract(s) permit(s), Business Associate may disclose Protected Health Information for the proper management and administration of the Business Associate or to carry out the legal responsibilities of the Business Associate, provided that:
   1) the disclosures are Required By La w; or
   2) Business Associate obtains reasonable assurances from the person to whom the information is disclosed that it will remain confidential and will be used or further disclosed only as Required By Law or for the purpose for which it was disclosed to the person, and the person notifies the Business Associate of any instances of which it is aware in which the confidentiality of the information has been breached.

c. Except as otherwise limited in this Agreement or by other applicable law or agreements, if the Contract(s) permit(s), Business Associate may use Protected Health Information to provide data aggregation services to Covered Entity as permitted by 45 C.F.R. § 164.504(e)(2)(i)(B).

d. Notwithstanding the foregoing provisions, Business Associate may not use or disclose Protected Health Information if the use or disclosure would violate any term of the Contract(s) or other applicable law or agreements.

5. TERM AND TERMINATION

a. **Term**. This Agreement shall be effective as of the effective date stated above and shall terminate when the Contract(s) terminate(s).

b. **Termination for Cause.** Upon Covered Entity's knowledge of a material breach by Business Associate, Covered Entity may, at its option:
   1) Provide an opportunity for Business Associate to cure the breach or end the violation, and terminate this Agreement and services provided by Business Associate, to the extent permissible by law, if Business Associate does not cure the breach or end the violation within the time specified by Covered Entity;
   2) Immediately terminate this Agreement and services provided by Business Associate, to the extent permissible by law; or
   3) If neither termination nor cure is feasible, report the violation to the Secretary as provided in the Privacy and Security Rules.

c. Effect of Termination.
   1) Except as provided in paragraph (2) of this section or in the Contract(s) or by other applicable law or agreements, upon termination of this Agreement and services provided by Business Associate, for any reason, Business Associate shall return or destroy all Protected Health Information received from Covered Entity, or created or received by Business Associate on behalf of Covered Entity. This provision shall apply to Protected Health Information that is in the possession of subcontractors or agents of Business Associate. Business Associate shall retain no copies of the Protected Health Information.
   2) In the event that Business Associate determines that returning or destroying the Protected Health Information is not feasible, Business Associate shall provide to Covered Entity notification of the conditions that make return or destruction not feasible. Business Associate shall extend the protections of this Agreement to such Protected Health Information and limit further uses and disclosures of such Protected Health Information to those purposes that make the return or destruction infeasible, for so long as Business Associate maintains such Protected Health Information.

6. GENERAL TERMS AND CONDITIONS

a. This Agreement amends and is part of the Contract(s).
b. Except as provided in this Agreement, all terms and conditions of the Contract(s) shall remain in force and shall apply to this Agreement as if set forth fully herein.
c. In the event of a conflict in terms between this Agreement and the Contract(s), the interpretation that is in accordance with the Privacy and Security Rules shall prevail. In the event that a conflict then remains, the Contract's(s') terms shall prevail so long as they are in accordance with the Privacy and Security Rules.
d. A breach of this Agreement by Business Associate shall be considered sufficient basis for Covered Entity to terminate the Contract(s) for cause.

SIGNATURES:

DocuSigned by:
Susan Davis Lackey
0A97C2CBDEE8483...

Covered Entity
LME/MCO

DocuSigned by:
Mike Downs
252DB2E96C2D460...

Business Associate
Provider

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Human Resources - Fire Services Compensation

BRIEF SUMMARY:
Fire Services Operations has developed a proposed career development plan for department employees. As part of this project we have re-evaluated the firefighter position and have a recommendation for movement as a "hot job".

REQUESTED ACTION:
Motion to approved proposed compensation changes for Fire Services Squad 410.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Lundee Covington, HR Director
Jason Burnett, Emergency Management Director

BUDGET AMENDMENT REQUIRED:
No

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

ATTACHMENTS:

- Hot Jobs List

6/5/2023

PROPOSED RECLASSIFICATIONS - PAY GRADE CHANGE				RANGES PRIOR TO COLA				
Current				New				
Classification Title	Grade	Minimum	Maximum	Classification Retitle/Notes	Current Employees	Grade	Minimum	Maximum
Fire Services								
Entry Level Firefighter (PT)	11 (24 HR)	$34,698.04	$54,155.40		3	12 (24 HR)	$36,103.60	$56,194.84
Firefighter	12 (24 HR)	$36,103.60	$56,194.84		8	14 (24 HR)	$39,824.20	$61,954.88
				Sub total	11			
				TOTAL	11			

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Juvenile Crime Prevention Council - Approval of FY 23-24 JCPC Certification

BRIEF SUMMARY:
The JCPC's FY 23-24 County Funding Plan remains pending at this time due to a program's appeal following the funding recommendations made during its April 19 meeting. The Plan itself cannot be presented for BOC approval until the appeal is fully resolved. However, it is requested that the JCPC Certification be considered for approval as the $15,500 recommended for JCPC Administration remains unchanged since FY 2017-2018.

REQUESTED ACTION:
Motion to approve the JCPC Certification as presented with the understanding that the FY 23-24 County Funding Plan will be presented for approval when the appeal is fully resolved.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Jim Howden, Finance 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:

- FY 23-25 JCPC Certification

Juvenile Crime Prevention Council Certification

Fiscal Year: 2023-24_____

County: **CABARRUS**	Date:
G.S. 143B-853 allows for a 2-year funding cycle for programs that meet the requirements of the statute and have been awarded funds in a prior funding cycle. Indicate below if the JCPC plans to allow for a 1-year or 2-year funding cycle. **(Check 2-year if the JCPC has a mixture of 1-year and 2-year funding.)**	
1-Year Funding: FY 2023-24	2-Year Funding: FY and FY

CERTIFICATION STANDARDS

STANDARD #1 - Membership

A. Have the members of the Juvenile Crime Prevention Council been appointed by county commissioners? Yes

B. Is the membership list attached? Yes

C. Are members appointed for two-year terms and are those terms staggered? Yes

D. Is membership reflective of social-economic and racial diversity of the community? Yes

E. Does the membership of the Juvenile Crime Prevention Council reflect the required positions as provided by N.C.G.S. §143B-846? Yes

If not, which positions are vacant and why?

Cabarrus Co JCPC has no vacant positions at this time.

STANDARD #2 - Organization

A. Does the JCPC have written Bylaws? Yes

B. Bylaws are ☒ attached or ☐ on file (Select one.)

C. Bylaws contain Conflict of Interest section per JCPC policy and procedure. Yes

D. Does the JCPC have written policies and procedures for funding and review? Yes

E. These policies and procedures ☐ attached or ☒ on file. (Select one.)

F. Does the JCPC have officers and are they elected annually? Yes

JCPC has: ☒ Chair; ☒ Vice-Chair; ☐ Secretary; ☐ Treasurer.

STANDARD #3 - Meetings

A. JCPC meetings are considered open and public notice of meetings is provided. Yes

B. Is a quorum defined as the majority of membership and required to be present in order to conduct business at JCPC meetings? Yes

C. Does the JCPC meet six (6) times a year at a minimum? Yes

D. Are minutes taken at all official meetings? Yes

E. Are minutes distributed prior to or during subsequent meetings? Yes

STANDARD #4 - Planning

A. Does the JCPC conduct a minimum of biennial planning process which includes a needs assessment, monitoring of programs and funding allocation process? Yes

B. Is this Annual or Biennial Plan presented to the Board of County Commissioners and to DPS? Yes

C. Is the Funding Plan approved by the full council and submitted to Commissioners for their approval? Yes

STANDARD #5 - Public Awareness

A. Does the JCPC communicate the availability of funds to all public and private non-profit agencies which serve children or their families and to other interested community members? (☒ RFP, distribution list, and article attached) Yes

B. Does the JCPC complete a minimum of biennial needs assessment and make that information available to agencies which serve children or their families, and to interested community members? Yes

STANDARD #6 – No Overdue Tax Debt

A. As recipient of the county DPS JCPC allocation, does the County certify that it has no overdue tax debts, as defined by N.C.G.S. §105-243.1, at the Federal, State, or local level? Yes

Briefly outline the plan for correcting any areas of standards non-compliance.

Not applicable

Having complied with the Standards as documented herein, the Juvenile Crime Prevention Council may use up to $15,500 of its annual Juvenile Crime Prevention fund allocation to cover administrative and related costs of the council. Budget pages (sections VI and VII) printed from NCALLIES detailing the expenditure's must be attached to this certification.

The JCPC Certification **must be received by DPS by June 30th annually.**

JCPC Administrative Funds
SOURCES OF REVENUE

DPS JCPC (Only list requested funds for JCPC Administrative Budget.)	$15,000
Local	
Other	500
Total	$15,500

JCPC Chairperson — Date: 5/17/2023

Chairman, Board of County Commissioners or Designee — Date

DPS Designated Official Date

CABARRUS County FY 2023-24

Instructions: N.C.G.S. § 143B-846 specifies suggested members be appointed by county commissioners to serve on local Juvenile Crime Prevention Councils. In certain categories, a designee may be appointed to serve. Please indicate the person appointed to serve in each category and his/her title. Indicate appointed members who are designees for named positions. Indicate race and gender for all appointments.

Specified Members	Name	Title	Designee	Race	Gender
1) School Superintendent or designee	Amy Jewell	Director of Student & Family Support	☒	W	F
2) Chief of Police or designee	Matthew Greer	Sergeant	☒	W	M
3) Local Sheriff or designee	Travis Burke	Deputy	☒	W	M
4) District Attorney or designee	Ashlie Shanley	District Attorney	☐	W	F
5) Chief Court Counselor or designee	Emily Coltrane	DPS Piedmont Area Administrator	☒	W	F
6) Director, Local Management Entity/Managed Care Organization (LME/MCO), or designee	LaShay Avery	Regional Dir Community Operations	☐	B	F
7) Director DSS or designee	Sharon Reese	Program Mgr Child Welfare Services	☒	B	F
8) County Manager or designee	James Howden	Co Finance Director	☒	W	M
9) Substance Abuse Professional	Terry Wise	Substance Abuse Profess		W	M
10) Member of Faith Community	Steven Ayers	Minister		W	M
11) County Commissioner	Chris Measmer	Commissioner		W	M
12) A person under the age of 21	Mikayla Branch	Student		B	F
13) A person under the age of 21, or a member of the public representing the interests of families of at-risk juveniles	Heather Jones	Parent		B	F
14) Juvenile Defense Attorney	Heather Mobley	Juvenile Defense Attorney		W	F
15) Chief District Judge or designee	Christy Wilhelm	Chief Judge	☐	W	F
16) Member of Business Community	Mark Boles	Business Owner/Operator		W	M
17) Local Health Director or designee	Sonja Bohannon-Thacker	CHA Director of Behavioral Health	☐	W	F

Juvenile Crime Prevention Council Certification (cont'd)

18) Rep. United Way/other non-profit	Carolyn Carpenter	Non-Profit Rep		W	F
19) Representative/Parks and Rec.	Jacob Wentink	Sr Park Ranger		W	M
20) County Commissioner appointee	Ashley Fitch	At Large		B	F
21) County Commissioner appointee	Connie Philbeck	At Large		W	F
22) County Commissioner appointee	Jamica LaFranque	At Large		B	F
23) County Commissioner appointee	Adrian Attaway	At Large (SRO for KCS)		B	M
24) County Commissioner appointee	Megan Baumgardner	Attorney		W	F
25) County Commissioner appointee	Marta Meares	At Large		W	F
26) County Commissioner appointee	Michelle Wilson	At Large		W	F

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Planning and Development - Community Development Budget Amendment

BRIEF SUMMARY:
The Housing and Home Improvement program that is available through the Home and Community Care Block Grant requires that staff request a donation to the program for services rendered if the individual is over a certain income. The donation is voluntary. All donations are required by the grant program to be applied back to the program to expand service. The attached budget amendment is to allocate donated revenues to expenses in order to follow the grant guidelines.

REQUESTED ACTION:
Motion to adopt the budget amendment.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Kelly Sifford, AICP, Assistant County Manager
Robert Anderson, Community Development Planner

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: 6/19/2023 **Amount:** 210.00

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

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

Purpose: To allocate the consumer contributions we have received to an expense category 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	300.00	210.00		510.00
001	9	3250-9493-HHIHR	Operations	20,359.00	210.00		20,569.00
						Total	21,079.00

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 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Planning and Development - Community Development Grant Required Plans and Programs

BRIEF SUMMARY:
Cabarrus County participates in a HOME Partnership program under the Cabarrus/Iredell/Rowan HOME Consortium and at times participates in CDBG programs that support various housing and economic development activities in Cabarrus County. These programs require a series of plans and programs to address various issues such as Fair Housing, Section 3, Anti-Displacement, Section 504, Citizen Participation, Procurement, Equal Opportunities and more. Attached are the required plans and programs for the next adoption period which will extend our program until June 2026.

REQUESTED ACTION:
Motion to adopt the Community Development Plans and Programs and Resolution as presented.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Robert Anderson, Community Development Planner

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:

- Fair Housing Resolution
- Fair Housing Plan
- Antidisplacement
- Citizen Participation
- Equal Opportunity
- Code of Conduct
- Procurement Policy
- Section 3 Plan

CABARRUS COUNTY

FAIR HOUSING RESOLUTION
For the Period of June 19, 2023-June 19, 2026

WHEREAS, The County of Cabarrus seeks to protect the health, safety, and welfare of its residents; and

WHEREAS, citizens seek safe, sanitary and habitable dwellings in all areas of the County; and

WHEREAS, the County finds the denial of equal housing opportunities because of religion, race, creed, color, sex, national origin, handicap, or age legally wrong and socially unjust; and

WHEREAS, the denial of equal housing opportunities in housing accommodations is detrimental to public welfare and public order; and

WHEREAS, the County finds the practice of discrimination against any citizen in housing a denial of his equal rights and equal opportunity to seek better living conditions and to develop community pride;

NOW, THEREFORE, BE IT ORDAINED, by the Board of Commissioners of the County of Cabarrus, North Carolina, that:

Section I. The Board of Commissioners of the County of Cabarrus has declared it an official policy of the County government that there shall not be allowed discrimination in the terms and conditions for buying or renting housing in the County of Cabarrus.

Section II. All business groups and individual citizens of the County of Cabarrus are urged to respect and implement this policy.

Section III. The Planning and Development Director or their designate, is the official authorized to (1) receive and document complaints regarding housing discrimination in Cabarrus County; and (2) refer such complaints to the North Carolina Human Relations Commission for investigation, conciliation and resolution.

ADOPTED, this 19th day of June, 2023.

By:_____
Stephen M. Morris, Chairman
Board of Commissioners

ATTEST:

_____
Clerk to the Board

Recipient's Plan to Further Fair Housing
For June 19, 2023-June 19, 2026

Grantee: Cabarrus County

Recipient's Address: P. O. Box 707, Concord, NC 28026

Contact Person: Susie Morris **Contact Phone #:704-920-2858**

Contact Email:samorris@cabarruscounty.us **TDD #:704-920-3000**

I. Indicate if the Recipient will be affirmatively furthering fair housing for the first time or has implemented specific activities in the past.

First Time_____ Past Activities__X_____

II. Identify and analyze obstacles to affirmatively furthering fair housing in recipient's community. (Use additional pages as necessary)

In the recently completed Analysis of Impediments to Fair Housing, the consultants found that the primary barriers to housing choice in Cabarrus County are generally economic and educational in nature. More specifically, the issues appear to include dealing with the general public's understanding of Fair Housing rights, the home buying process, the number of affordable accessible units available and access to affordable loan packages and loan modifications promoting housing choice.

- **Availability of Affordable Units-** Cabarrus County has experienced tremendous growth in the past five years. Production of housing units has not kept pace with population growth. The lack of units has caused less vacant units and less affordable units in the community as a whole resulting in less housing choice. Client service based non-profits report an insufficient number of accessible units as well as units that provide supportive and/or transitional services.
- **Fair Housing Awareness.** Cabarrus County has had some fair housing complaints in the past few years reported directly to the Human Relations Council. It is possible that some fair housing violations go unreported due to a lack of understanding or knowledge of the rights of protected persons and families. Awareness in the private sector, as well as with the average individual, is a crucial step in addressing this particular barrier. Cabarrus County works with the local municipalities and nonprofits to provide fair housing information to citizens and businesses.
- **Knowledge of the Home buying process and associated costs.** Many families or individuals wishing to move into homeownership are not informed about the process of purchasing a home. This lack of knowledge may make them vulnerable to unscrupulous realtors, predatory lenders and poor loans which can

limit housing choice through cost. Additionally, people new to homeownership may not understand the cost of home maintenance and budgeting for those and other associated costs (insurance, taxes, etc).

- **Transportation.** Changes in housing growth patterns in recent years have lead to more suburban housing options in Cabarrus County. However, transportation from these areas to employment and services may be a limiting factor for some families in accessing these housing choices. Economic or physical factors may limit the ownership of a vehicle, which may in turn limit access from these housing options to employment and services.

III. Will the above activities apply to the total municipality or county?

Yes__X___ No_____ **If no, provide an explanation.**
(Use additional pages as necessary)

IV. Briefly describe the quarterly activities that the recipient will undertake over the active period of the grant to affirmatively further fair housing in their community. A time schedule and estimated cost for implementation of these activities must be included. ***Activities must be scheduled for implementation at least on a quarterly basis.*** (Use attached table)

Grantee: Cabarrus County

Quarterly Fair Housing Activity	Months	Year	Estimated Cost	Actual Cost
Creation and adoption of the recently completed Fair Housing Plan and the Analysis of Impediments to Fair Housing.	June-Sept 2023	*2023*	*$5500*	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and newspaper advertisement.	Oct- Dec 2023	2023	$350	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and placement of pamphlets in government offices, libraries, and Department of Human Services.	Jan-March 2024	2024	$40	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and newspaper advertisement publishing fair housing law and TDD number for complaints. Joint fair housing event in conjunction with other local jurisdictions.	April-June 2024	2024	$300	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and provide Fair Housing information and offering technical assistance to nonprofit agencies and the Department of Human Services in Cabarrus County who serve potentially protected groups such as programs that provide homebuyer assistance and rental assistance. Mail fliers and make phone calls to raise awareness.	July-Sept 2024	2024	$50	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and local cable television advertisement regarding Fair Housing in English and Spanish.	Oct-Dec 2024	2024	$0	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and newspaper advertisement publishing fair housing law and TDD number for complaints.	Jan-March 2025	2025	$250	

Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and placement of pamphlets in government offices, libraries, and Department of Human Services. Fair Housing event with other local jurisdictions.	April-June 2025	2025	$340	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and local cable television advertisement regarding Fair Housing in English and Spanish.	July-Sept 2025	2025	$0	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and provide Fair Housing information and offering technical assistance to nonprofit agencies and the Department of Human Services in Cabarrus County who serve potentially protected groups such as programs that provide homebuyer assistance and rental assistance. Mail fliers and make phone calls to raise awareness.	Oct-Dec 2025	2025	$50	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and update Fair Housing pamphlets at government offices, libraries and the Cabarrus County Department of Human Services.	Jan-March 2026	2026	$40	
Cabarrus County Website Advertisement for Fair Housing (English and Spanish) and provide information to the local realtors' association regarding Fair Housing. Joint Fair Housing event with other local jurisdictions.	April-June 2026	2026	$350	

V. Describe recipient's method of receiving and resolving housing discrimination complaints. This may be either a procedure currently being implemented or one to be implemented under Cabarrus County grants. Include a description of how the recipient informs the public about the complaint procedures. (Use additional pages as necessary)

1) Any person or persons wishing to file a complaint of housing discrimination in the county may do so by **informing the Cabarrus County Planning and Development Director** of the facts and circumstance of the alleged discriminatory acts or practice.

2) Upon receiving a housing discrimination complaint, the **Cabarrus County Planning and Development Director** shall acknowledge the complaint within **10 days in writing** and inform the North Carolina Human Relations Commission about the complaint.

3) The **Cabarrus County Planning and Development Director** shall **offer assistance** to the Commission in the investigation and reconciliation of all housing discrimination complaints which are based on events occurring in the County.

4) The **Cabarrus County Planning and Development Director** shall **publicize** in the local newspaper, with the TDD# 704-920-3000, who is the local agency to contact with housing discrimination complaints.

Approved By:

Stephen M. Morris

Chairman, Cabarrus County Board of Commissioners	**Signature**	**Date**

CABARRUS COUNTY
RESIDENTIAL ANTIDISPLACEMENT AND
RELOCATION ASSISTANCE PLAN
UNDER SECTION 104(d) OF THE HOUSING AND
COMMUNITY DEVELOPMENT ACT OF 1974, AS AMENDED

HOME/CDBG programs
June 19, 2023- June 19, 2026

The County will replace all occupied and vacant occupiable low/moderate-income dwelling units demolished or converted to a use other than as low/moderate-income housing as a direct result of activities assisted with funds provided under the Housing and Community Development Act of 1974, as amended, as described in 24 CFR 570.606(b)(1).

All replacement housing will be provided within three years of the commencement of the demolition or rehabilitation relating to conversion. Before obligating or expending funds that will directly result in such demolition or conversion, the County will make public and submit to the appropriate governing agency with the following information in writing:

1. A description of the proposed activity;
2. A general location on a map and approximate number of dwelling units by size (number of bedrooms) that will be demolished or converted to a use other than as low/moderate-income dwelling units as a direct result of the assisted activity;
3. A time schedule for the commencement and completion of the demolition or conversion;
4. The general location on a map and approximate number of dwelling units by size (number of bedrooms) that will be provided as replacement dwelling units.
5. The source of funding and a time schedule for the provision of the replacement units; and
6. The basis for concluding that each replacement dwelling unit will remain a low/moderate-income dwelling unit for at least 10 years from the date of initial occupancy.

The County will provide relocation assistance, as described in 24 CFR 570.606(b)(2), to each low/moderate-income household displaced by the demolition or housing or by the conversion of a low/moderate-income dwelling to another use as a direct result of assisted activities.

Consistent with the goals and objectives of activities assisted under the act, we will take the following steps to minimize the displacement of persons from their homes:

1. *No housing unit will be demolished that, after inspection, has been found to be in such structural condition that it can be repaired for $25.00 per square foot up to a maximum of $25,000 per structure.*
2. No housing unit will converted to a use other than as low/moderate-income housing using CDBG or HOME funds.

Adopted this 19th day of June, 2023.

_____ By:_____
Date Stephen M. Morris, Chairman
Board of Commissioners

ATTEST:

_____
Clerk

CITIZEN PARTICIPATION PLAN
CABARRUS COUNTY

This plan describes how Cabarrus County will involve citizens in the planning, implementation, and assessment of the HOME and CDBG Programs. The HOME and CDBG Programs provide funds to local governments through a HOME consortium and through the state of North Carolina. The funds must be used for projects which benefit low-and-moderate-income persons. The regulations give ultimate responsibility for the design and implementation of the program to local elected officials and also requires that citizens be given an opportunity to serve in key advisory roles to these elected officials.

SCOPE OF CITIZEN PARTICIPATION

Citizens will be involved in all stages of the HOME and CDBG programs, including application, program implementation, amendments, closeout, assessment of performance and design of changes in the Plan. There will be two (2) general mechanisms for their involvement: (1) public hearings and ad hoc community meetings; and (2) individual citizen efforts in the form of comments, complaints or inquiries submitted directly to the Program Administrator or the consultant who is administering the program.

PROGRAM IMPLEMENTATION

Citizen participation in program implementation will occur primarily through consultation with the program administrator or Board of Commissioners. They will be asked to review and comment on specific guidelines for approved projects. They will also meet to review any program amendments, budget revisions, and other program modifications. All such changes will be discussed and their comments considered prior to action being taken. These meetings will be held on an as-needed basis. If program amendments require a governing board approval, a public hearing will be held on the amendment. Citizens may also be involved in implementation of projects requiring citizen participation.

PROGRAM ASSESSMENT

Program assessment activities by citizens will occur in a variety of ways. A performance hearing will be held thirty (30) to sixty (60) days prior to the start of planning for the next program year. The Board of Commissioners will be asked to provide time for citizen commentary for the Grantee Performance Report and to review that report prior to its submission.

As part of the orientation to the program offered at the public hearing, citizens will be invited to submit comments on all aspects of program performance through the program year. Complaints should be submitted in writing to :

Community Development Coordinator
Planning and Development Department
P.O. Box 707, Concord, NC 28026

A response will be given within ten (10) calendar days. If the response is unsatisfactory and the citizen is still dissatisfied, he/she should write to:

City of Concord Planning and Development Department
HOME Compliance Officer
P.O. Box 308, Concord, NC 28026

for HOME program concerns to request an investigation of the problem. CDBG programs will be directed to the state offices. Program staff will also be available during normal business hours to respond to citizen inquiries.

The Citizen Participation Plan will be subject to annual review and proposed revisions by the Board of Commissioners to occur in the period between the performance hearing and the first public hearing on the subsequent year's application.

Technical assistance will be provided to citizen organizations and groups of low/moderate income persons or target area residents upon request. Such assistance will support citizen efforts to develop proposals, define policy and organize for the implementation of the program. It is expected that such assistance will be provided directly to the Board of Commissioners in response to their request. Assistance could be provided in the form of local expert presentations, information handouts, research of a specific issue, or other short-term efforts.

Public Information: A public information effort will be undertaken to promote citizen participation. These efforts will include:

- Public Notice of all public hearings will be published in the newspaper at least ten (10) days before the hearing. These notices will indicate the date, time, location and topic to be considered. The notices will also be made available on the county website and on Channel 22.

- Orientation information will be provided at the first public hearing. The Program Administrator will make a presentation at the televised public meeting covering the total HOME and/or CDBG funds available; the range of eligible activities; the planning process and the schedule of meetings and hearings; the role of the citizens in the program; and a summary of other program requirements such as environmental, fair housing and contracting procedures.

- A public file containing program documentation will be available for review at the Cabarrus County Government Center, 65 Church Street S., Concord, NC 28026 during normal business hours. Included will be copies of the Application, Environmental Review Record, the Citizen Participation Plan, and Annual Performance Reports. Other program documents are also available for citizen review or request consistent with applicable state and local laws regarding personal privacy and obligations of confidentiality.

- In the case of public hearings where a significant number of non-English speaking residents are expected to participate, a bilingual interpreter will be provided. All required documents will be available in Spanish.

- In the case of hearing impaired, a person will be provided to sign.

Adopted this 19th day of June, 2023.

By: _____
Stephen M. Morris, Chairman
Board of Commissioners

ATTEST:

_____
Clerk to Board

Cabarrus County

Equal Employment and Procurement Plan
For the Period of June 19, 2023- June 19, 2026

The County of Cabarrus maintains the policy of providing equal employment opportunities for all persons regardless of race, color, religion, sex, national origin, handicap, age, political affiliation, or any other non-merit factor, except where religion, sex, national origin, or age are bona fide occupation qualifications for employment.

In furtherance of this policy, the County prohibits any retaliatory action of any kind taken by any employee of the locality against any other employee or applicant for employment because that person made a charge, testified, assisted or participated in any manner in a hearing, proceeding or investigation of employment discrimination.

The County shall strive for greater utilization of all persons by identifying previously under utilized groups in the work force, such as minorities, women, and the handicapped, making special efforts toward their recruitment, selection, development and upward mobility and any other term, condition, or privilege of employment.

Responsibility for implementing equal opportunities and Affirmative Action measures is hereby assigned to the Chairman and/or other persons designated by the Chief Elected Official to assist in the implementation of this policy statement.

The County shall develop a self-evaluation mechanism to provide for periodic examination and evaluation. Periodic reports as requested on the progress of Equal Employment Opportunity and Affirmative Action will be presented to the Chief Elected Official.

The County is committed to this policy and is aware that with its implementation, the County will receive positive benefits through the greater utilization and development of all its human resources.

Adopted this 19th day of June, 2023.

_____
Stephen M. Morris, Chairman
Board of Commissioners

ATTEST:

_____
Clerk

COMMUNITY DEVELOPMENT CODE OF CONDUCT
For the Period of June 19, 2023-June 19, 2026

HATCH ACT
No employee or agent of the County may perform any function during work hours that is considered political activity. This includes: soliciting votes, transporting voters, distributing campaign materials, working or developing campaign materials, etc.

NON DISCRIMINATION
No person shall, on the grounds of race, color, national origin, handicap, or sex be excluded from participation in, be denied the benefits of, or be subject to discrimination under any program or activity funded in whole or in part with Community Development funds.

ENGAGEMENT IN PROCUREMENT
No employee, officer, or agent of the County shall participate in the selection or award of a contract supported by federal funds if a conflict of interest, real or apparent would be involved. Such a conflict would arise when:

a) The employee, officer, or agent;
b) Any member of his/her immediate family;
c) His or her partner; or
d) An organization which employs or is about to employ, any of the above, has a financial or other interest in the firm selected for award.

The grantee's officers, employees, or agents shall neither solicit nor accept gratuities, favors or anything of monetary value from contractors, potential contractors or parties to subagreements.

CONFLICT OF INTEREST
No employee or agent shall influence or attempt to influence the outcome of any case or matter in which he has a direct interest either personally or in the person of any relative by blood or marriage. Employees or agents so involved shall abstain from dealing with such matters; they may provide information at the request of the County, but shall not attempt to influence the decision of the County.

Adopted this 19th day of June, 2023.

_____
Date

By:_____
Stephen M. Morris, Chairman,
Board of Commissioners

_____
Clerk to Board

CABARRUS COUNTY

PROCUREMENT POLICY
HOME and/or CDBG Programs

For the Period of June 19, 2023-June 19, 2026

In the procurement of supplies, equipment, or services in the CABARRUS COUNTY HOME and/or CDBG programs the following shall apply:

1) Small Purchase Procedures. These are relatively simple and informal procurement methods that are sound and appropriate for a procurement for services, supplies, or other property, costing in the aggregate not more than $3,000. Under this procurement method price or rate quotations shall be obtained from an adequate number of qualified sources. Office supplies and equipment may be secured by this method.

2) In Competitive Sealed Bids (formal advertising), sealed bids shall be publicly solicited and a firm, fixed price contract shall be awarded to the responsible bidder whose bid, conforming with all of the material terms and conditions of the invitation for bids, is lowest in price.

.

3) In Competitive Negotiations, proposals shall be requested from a number of sources and the Request for Proposals shall be publicized. All aspects of the competitive negotiations shall be carried out in conformance with Federal Circular A-102. The general administrative contract was awarded using this method.

On all procurements efforts shall be made to solicit bids from qualified small and minority business firms.

In all cases, procurement under this Policy must conform to the requirements set forth in 24 CFR 85.36.

An adequate record of procurements must be maintained to insure that these policies and the requirements of 24 CFR 85.36 have been followed in their entirety.

ADOPTED THIS THE 19th DAY OF JUNE, 2023 BY THE CABARRUS COUNTY BOARD OF COMMISSIONERS.

By: _____
Stephen M. Morris, Chairman,
Board of Commissioners

ATTEST:

_____
Clerk to Board

Local Economic Benefit for Low- and Very Low-Income Persons Plan
For the Period of
June 19, 2023- June 19, 2026

To ensure that, to the greatest extent possible, contracts for work are awarded to business concerns located or owned in substantial part by persons residing in the Section 3 covered area, as required by Section 3 of the Housing and Urban Development Act of 1968, the County of Cabarrus has developed and hereby adopts the following Plan:

This Section 3 Plan shall apply to services needed in connection with the grant including, but not limited to, businesses in the fields of planning, consulting, design, building construction/renovation, maintenance and repair, etc.

This Section 3 covered project area for the purposes of this grant program shall include the County of Cabarrus and portions of the immediately adjacent area.

When in need of a service, the County will identify suppliers, contractors or subcontractors located in the Section 3 area. Resources for this identification shall include the Minority Business Directory published through the NC state offices, local directories and Small Business Administration local offices. Word of mouth recommendation shall also be used as a source.

The County will include this Section 3 clause in all contracts executed under HOME and CDBG programs. Where deemed necessary, listings from any agency noted above shall be included as well as sources of subcontractors and suppliers.

The prime contractor selected for major public works facility or public construction work will be required to submit a Section 3 Plan which will outline his/her work needs in connection with the project. Should a need exist to hire any additional personnel, the Cabarrus County Employment Security Commission shall be notified and referred to the contractor.

Each contract for housing rehabilitation under the program, as applicable, for jobs having contracts in excess of $100,000 shall be required to submit a Section 3 Plan. This Plan will be maintained on file in the grant office and shall be updated from time to time or as the grant staff may deem necessary.

Early in our project, prior to any contracting, major purchases or hiring, we will develop a listing of jobs, supplies and contracts likely to be utilized during the project. We will then advertise in our local newspaper an advertisement, prominently located as a display advertisement, the pertinent information regarding the project including all Section 3 required information.

Adopted this 19th day of June, 2023.

_____
Stephen M. Morris Chairman
Cabarrus County Board of Commissioners

Attest:

_____
Clerk to the Board of Commissioners

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Register of Deeds - Use of Register of Deeds Automation Fund for Re-indexing Cabarrus County Land Records

BRIEF SUMMARY:
The Register of Deeds index of online land records from 1/1/1983 allows access of land records by party names.

Prior online access is by use of virtual images of our physical index books, which is a more cumbersome and complex process for both professionals and the public.

REQUESTED ACTION:
Motion to approve use of the Cabarrus County Register of Deeds automation fund to re-index Cabarrus County land records from January 1, 1938 through December 31, 1982.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Wayne Nixon, Register of Deeds

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:

- Revised Proposal
- Representative Register Budgets

a.

LOGAN SYSTEMS, INC.
4003 Clifton Road • Greensboro, NC 27407
Toll Free: 1-800-342-2208 • Fax: 336-299-9905

March 26, 2023

Hon. Wayne Nixon
Register of Deeds
Cabarrus County Courthouse
65 Church St. SE
Concord, NC 28025

Re: Revised Proposal for Re-indexing Land Records

Dear Mr. Nixon:

Logan Systems has been re-indexing land records in Cumberland County and union County for the past few years. We have also re-indexed several other record types for our customers, including birth, death, marriage, court orders, etc. In Fiscal Year 2023, we are re-indexing records for nine customers. We previously provided you with a proposal for re-indexing land records from 1968-1982. We are amending that proposal to add the next year range of 1938-1967.

For each index that we key, we work with the elected official to determine the best method for the project. In your office, we would suggest that we key from the index once initially and then use key verification techniques to check our work. This is the same process that your staff does each day to confirm the accuracy of their input. All difficult issues will be handled at a supervisor level and we will come back to you and your staff with any questions that are specific to a particular instrument.

We will work up sample indexing and come to meet with you and your staff to determine the final rules for each instrument type. We use your scanned index books to determine what names and formats should be indexed historically. Once we have that information, our actual work begins.

We charge an initial fee for all of the preparation work. This includes reviewing the older scanned index books to determine indexing rules for different instrument types. It also includes our meetings with you and your staff to determine the rules for this project. We charge a one-time fee of $4,500.00 for this initial review and rule setting. We will not charge that fee again for your land record re-indexing efforts.

We would propose that we index time periods that match the historical index books. Our fee is based on instrument counts. We have done some sampling to determine fair instrument count estimates for each time period. Based on our instrument count estimates, we propose to re-index your land records from January 1, 1968 to

December 31, 1982. This would replace one entire year range in the imaged index product. Our fee for that keying would be $118,500.00. Therefore, the total, including the rule creation work would be **$123,000.00.**

The next time period that would match existing index books would be January 1, 1938 through December 31, 1967. There would be no charge for the rule setting as we would use the same rules as the 1968-1982 time period. The instruments are shorter, on average, for this time period. Our fee to re-index all of these records would be **$152,000.00.**

Once the project is completed, staff and public users will be able to access the indexing records and search based on party names. Based on our discussions, Logan Systems would index human last names, human first and middle names, status (if applicable), business names, description (as indexed at the time), book number, and page number. We would assign instrument numbers. Once the indexing entry is found, the image can be obtained through our system by clicking on the image link.

We appreciate the opportunity to explain our procedures and conversion methods to you. If you have any questions about this proposal or any other matters, please contact me at your earliest convenience at our toll-free number.

Sincerely,

Craig Sanders
President

Table 1.1 Representative Register Budgets

	Large County	Medium County	Small County
Revenue			
Fees	5,000,000	262,000	19,000
Excise tax	5,000,000	150,000	12,000
Total revenue	10,000,000	412,000	31,000
Expenses			
Personnel	2,000,000	275,000	95,000
Operations	750,000	75,000	35,000
Total expenses	2,750,000	350,000	130,000

All registers face challenges in preparing their budgets and working with the budget officers and county commissioners to retain experienced and knowledgeable personnel, keep up with technological demands, and maintain the level of service expected by the transactional community and the general public. As the samples above show, registers' financial circumstances can be very different—but all registers face difficult challenges working within the county budget. In a small county, a register must compete for meager resources to provide the same kind of basic services as any other county in the state. In a large county, a register is expected to continue to operate in a way that generates the revenue needed for the many other services a county must provide in a metropolitan area. To deal with these challenges, registers must be both knowledgeable about their offices and able to communicate well about their offices' requirements in the next year and thereafter. Register of deeds offices must be supported adequately to perform their functions reliably and efficiently in a modern environment, but everyone also must understand the constraints of the county revenues and the competing demands for support of other county services.

1.9.2 Automation Enhancement and Preservation Fund

The North Carolina General Statutes (hereinafter G.S.) require counties to have an "automation enhancement and preservation fund" (AEPF) for register of deeds offices as follows:

> Ten percent (10%) of the fees collected pursuant to G.S. 161-10 and retained by the county, or six dollars and twenty cents ($6.20) in the case of a fee collected pursuant to G.S. 161-10(a)(1a) for the first page of a deed of trust or mortgage, shall be set aside annually and placed in a nonreverting Automation Enhancement and Preservation Fund, the proceeds of which shall be expended on computer or imaging technology and needs associated with the preservation and storage of public records in the office of the register of deeds. Nothing in this section shall be construed to affect the duty of the board of county commissioners to furnish supplies and equipment to the office of the register of deeds.[154]

Fees "collected pursuant to G.S. 161-10" to which the 10 percent retention requirement applies include all fees *retained by the county* for real estate instrument recording, marriage licenses, vital record fees, and other fees but do not include what the register collects for forwarding to the state, nor do they include excise taxes. As the statute provides, the percentage retained is separately calculated for fees for deeds of trust and mortgages.

This statute was intended to ensure that a portion of the register's receipts be available for the implementation and maintenance of technologies supporting the register's functions. It does not give specific direction about how this fund interrelates with other county funds necessary for the register's budget. The statute's intent clearly would be violated if the AEPF amount were merely blended into the county's general fund and applied indiscriminately to general county expenditures. Although the statute does not require that funds be collected for more than one year, the logic of a non-reverting fund is to address a register's need to accumulate funds from year to year for expenses that cannot be met from the recurring operating budget.

The AEPF earmark for "needs associated with the preservation and storage of public records" is broad. Information technology has since become central to register operations, with demands not only for imaging and data processing but now also for Internet facilities to enable online access and filing. To honor the statutory intent and to fulfill the register's and the county's responsibilities to county citizens, the register and the county finance officer should work together to develop a multiyear technology plan that includes how the fund is to be applied. The AEPF is a tool for ensuring that resources are accumulated and made available for upgrades and enhancements that require more than the usual operating budget allocation.

154. G.S. 161-11.3.

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Sheriff's Office - Awarding of Service Weapon to Captain Kevin Pfister Upon His Retirement

BRIEF SUMMARY:
Captain Kevin Pfister will be retiring from the Cabarrus County Sheriff's Office with his last day being June 30, 2023. In accordance with NC GS 20-187.2, his duty weapon will be awarded to him for a price of $1.00 after being designated surplus property.

REQUESTED ACTION:
Motion to declare Sig Sauer P320 SN# 58J376998 surplus property and authorize disposition in accordance with the County's policy.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Chief Deputy Tessa Burchett

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:
Approval is recommended.

ATTACHMENTS:

- Signed Surplus Form and Receipt

Cabarrus County Asset Transfer, Surplus, Demolition Form

Action:	**Retire/Sold**
Date:	6/30/2023

Statute Action: To dispose of property valued up to $30,000

Was this asset purchased with grant funds: **No**

General Statute: GS 160A-266C

FROM	
Name	Cabarrus County
Department	Sheriff's Office
Asset Number	N/A
Serial Number	58J376998
Description	Sig Sauer P320

TO	
Name	Kevin Pfister
Department	Sheriff's Office
Location	1530 Porters Ct Concord
Reason	Captain Kevin Pfister will be retiring after a full career with the Cabarrus County Sheriff's Office. Per NC GS 20-187.2, his duty weapon will be awarded to him upon retirement. $1.00 was paid for the firearm.

Is this a Vehicle? No	
Vehicle ID #	N/A
Year	N/A
Mileage	N/A
Tag #	N/A
Effective Date	

IAM Director:		**Date:**	5-16-23
Assistant County Manager:		**Date:**	5-16-23
Chief Procurement Officer:		**Date:**	5-17-2023
County Manager:		**Date:**	5-17-23

RECEIPT

DATE 5/16/2023 No. 072950

RECEIVED FROM Kevin Pfister $ 1.00

DOLLARS

○ FOR RENT
○ FOR Sig Saves P320 585 376918

ACCOUNT	
PAYMENT	
BAL. DUE	

✓ CASH
○ CHECK
○ MONEY ORDER
○ CREDIT CARD

FROM _____ TO _____

BY Daniel Rance

3-11

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Sheriff's Office - Retirement of K9 Turbo

BRIEF SUMMARY:
Sheriff's Office - Retirement of K9 Turbo. Request to surplus K9 Turbo and turn over to K9 Handler Stephanie Champlin due to the upcoming retirement of the working K9 due to age. Turbo is now 8 years old and has worsening health problems, specifically a heart murmur and tires easily. Turbo's last working day would be June 30th.

REQUESTED ACTION:
Motion to declare K9 Turbo surplus property and authorize disposition in accordance with the County's policy.

EXPECTED LENGTH OF PRESENTATION:

SUBMITTED BY:
Chief Deputy Tessa Burchett

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:

- Surplus Form - K-9 Turbo

Cabarrus County Asset Transfer, Surplus, Demolition Form

Action:	**Retire/Sold**
Date:	6/30/2023

Statute Action: To dispose of property valued up to $30,000

Was this asset purchased with grant funds: **No**

General Statute: GS 160A-266C

FROM	
Name	Cabarrus County
Department	Sheriff's Office
Asset Number	K9 Turbo
Serial Number	N/A
Description	Eight year old German Shephard Police K9

TO	
Name	Stephanie Champlin
Department	Sheriff's Office
Location	1638 Marmot Pl Concord
Reason	The K9 has aged out and has health issues. The K9's handler, Deputy Stephanie Champlin has signed the waiver and agreement to take custody and care for the dog for the remainder of it's life.

Is this a Vehicle? No	
Vehicle ID #	N/A
Year	N/A
Mileage	N/A
Tag #	N/A
Effective Date	

IAM Director:		**Date:**	5-9-23
Assistant County Manager:		**Date:**	5-9-23
Chief Procurement Officer:		**Date:**	5-10-23
County Manager:		**Date:**	5-10-23

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Consent Agenda

SUBJECT:
Tax Administration - Refund and Release Reports - May 2023

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 2023 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:
Approval is recommended.

ATTACHMENTS:

- Release Refund Summary
- Release Refund Detail
- NCVTS Report

Summary of Releases and Refunds for the Month Of May 2023

RELEASES FOR THE MONTH OF: MAY 2023	**$25,275.21**

BREAKDOWN OF RELEASES:	
COUNTY	$19,723.33
CITY OF CONCORD	$1,603.53
CITY OF KANNAPOLIS	$1,003.45
CITY OF LOCUST	$0.00
CITY OF STANFIELD	$0.00
CITY OF CONCORD DOWNTOWN	$99.05
TOWN OF HARRISBURG	$347.08
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	$640.07
GEORGEVILLE F/D	$630.99
GOLD HILL F/D	$1,059.18
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	$168.53
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 2023	**$70,644.46**

BREAKDOWN OF REFUNDS:	
COUNTY	$47,157.45
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	$23,340.48
TOWN OF MIDLAND	$0.00
TOWN OF MT. PLEASANT	$0.00
ALLEN F/D	$0.00
COLD WATER F/D	$56.53
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	$90.00
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 2023 RELEASE REPORT

Name	Bill#	Reason	District	Amount
BHR LAND HOLDINGS LLC	2021-18838	RELEASE/REFUND PER ANNEX ORD 2021-257,	FR14ADVLTAX	263.56
BHR LAND HOLDINGS LLC	2022-19060	RELEASE/REFUND PER ANNEX ORD 2021-257, PARCEL ANNEXED INTO TOWN OF MIDLAND EFF 3/9/21, TAX DIST. & CODES WERE NOT UPDATED FOR 2021 & 2022 TAX YRS. TAX CODES HAVE BEEN UPDATES FOR 2023-FUTURE YRS. APPLY REFUND FROM RURAL FIRE TO CITY PORT OF TAX BILL, MAIL ADJ BILL	FR14ADVLTAX	376.51
BOWLING DEAN CARTER	2023-305	INFORMAL VALUE APPEAL 105-312	CI01ADVLTAX	26.56
BOWLING DEAN CARTER	2023-305	INFORMAL VALUE APPEAL 105-312	C ADVLTAX	45.18
BOWLING DEAN CARTER	2023-305	INFORMAL VALUE APPEAL 105-312	C PEN FEE	9.04
BOWLING DEAN CARTER	2023-305	INFORMAL VALUE APPEAL 105-312	CI01PEN FEE	5.31
EVANS JONATHAN MATTHEW	2022-500988	105381 - TAX JURISDICTION	CI04ADVLTAX	423.17
EVANS JONATHAN MATTHEW	2022-500988	105381 - TAX JURISDICTION	C ADVLTAX	497.06
FARNAM STREET FINANCIAL	2023-204	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	C ADVLTAX	91.02
FARNAM STREET FINANCIAL	2023-204	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	CI02ADVLTAX	59.04
FARNAM STREET FINANCIAL	2023-204	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	C PEN FEE	18.20
FARNAM STREET FINANCIAL	2023-204	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	CI02PEN FEE	11.81
FARNAM STREET FINANCIAL	2023-203	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	C ADVLTAX	754.50
FARNAM STREET FINANCIAL	2023-203	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	CI02ADVLTAX	489.40
FARNAM STREET FINANCIAL	2023-203	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	CI02PEN FEE	48.94
FARNAM STREET FINANCIAL	2023-203	OTHER. NCGS 105-312. THE COMPANY SUBMITTED A 2023 LISTING WITH PRIOR YEAR ASSETS ON THE RETURN NOT SITUSED IN CABARRUS COUNTY	C PEN FEE	75.45
GREENHILL GAIL LISA	2023-500872	TAX CODE/JURISDICTION CORRECTION; 105-381:	CI01ADVLTAX	66.64
GREENHILL GAIL LISA	2023-500872	TAX CODE/JURISDICTION CORRECTION; 105-381:	C ADVLTAX	113.37
HARWARD'S REALTY & INS CO	2022-50727	BOER DECISION 105381 ON MAY 4TH 2023, BOARD OF E & R APPROVED REFUND AND RELEASE OF TAXES FOR PARCEL# 5640-92-7253-0000. REFUND FOR TAXES PAID FOR TAX YEARS 2018, 2019, 2020 & 2021, RELEASE OF TAXES FOR TAX YEAR 2022.	C ADVLTAX	177.60
HARWARD'S REALTY & INS CO	2022-50727	BOER DECISION 105381 ON MAY 4TH 2023, BOARD OF E & R APPROVED REFUND AND RELEASE OF TAXES FOR PARCEL# 5640-92-7253-0000. REFUND FOR TAXES PAID FOR TAX YEARS 2018, 2019, 2020 & 2021, RELEASE OF TAXES FOR TAX YEAR 2022.	FR03ADVLTAX	19.20
HEATH LARRY MICHAEL JR	2007-590543		C ADVLTAX	302.40
HEATH LARRY MICHAEL JR	2007-590543		CI04ADVLTAX	238.56
JENRETTE DANIELLE FREESTONE	2022-505577	105-381 TAX CODE/JURISDICTION	C ADVLTAX	104.34

JENRETTE DANIELLE FREESTONE	2022-505577	105-381 TAX CODE/JURISDICTION	CI02ADVLTAX	67.68
KILMURRY THOMAS JOSEPH	2023-800013	wrong tax code used	C ADVLTAX	153.70
KILMURRY THOMAS JOSEPH	2023-800013	wrong tax code used	CI02ADVLTAX	99.70
K-NAILS	2022-62063	BUSINESS CLOSED; 105-381	CI04PEN FEE	8.06
K-NAILS	2022-62063	BUSINESS CLOSED; 105-381	C PEN FEE	9.46
K-NAILS	2022-62063	BUSINESS CLOSED; 105-381	CI04ADVLTAX	80.56
K-NAILS	2022-62063	BUSINESS CLOSED; 105-381	C ADVLTAX	94.63
LAWRENS WILLIAM EDGAR JR	2023-502918	TAX CODE/JURISDICTION CORRECTION; 105-381:	C ADVLTAX	422.85
LAWRENS WILLIAM EDGAR JR	2023-502918	TAX CODE/JURISDICTION CORRECTION; 105-381:	CI01ADVLTAX	248.57
LOVE JENNIFER HUGHES	2023-376	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	C ADVLTAX	327.08
LOVE JENNIFER HUGHES	2023-373	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	C ADVLTAX	1364.71
LOVE JENNIFER HUGHES	2023-373	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	FR13ADVLTAX	169.67
LOVE JENNIFER HUGHES	2023-376	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	FR13ADVLTAX	40.66
LOVE JERRY L	2023-375	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	FR13ADVLTAX	40.66
LOVE JERRY L	2023-372	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	FR13ADVLTAX	169.67
LOVE JERRY L	2023-372	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	C ADVLTAX	1364.71
LOVE JERRY L	2023-375	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	C ADVLTAX	327.08
LOVE JERRY L	2023-371	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	C ADVLTAX	1364.71
LOVE JERRY L	2023-374	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	C ADVLTAX	327.08
LOVE JERRY L	2023-371	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	FR13ADVLTAX	169.67
LOVE JERRY L	2023-374	PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM	FR13ADVLTAX	40.66
LOWDER BETTY BARRINGER & HSB	2023-359	PROPERTY DISQUALIFIED FOR FAILURE TO COMPLETE 2022 COMPLIANCE REVIEW. TAXPAYER SUBMITTED COMPLIANCE REVIEW INFORMATION WITHIN 60 DAYS OF DISQUALIFICATION. PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM AND DEFERRED BILLS SHOULD BE RELEASED IN THEIR ENTIRITY.	FR17ADVLTAX	338.94
LOWDER BETTY BARRINGER & HSB	2023-359	PROPERTY DISQUALIFIED FOR FAILURE TO COMPLETE 2022 COMPLIANCE REVIEW. TAXPAYER SUBMITTED COMPLIANCE REVIEW INFORMATION WITHIN 60 DAYS OF DISQUALIFICATION. PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM AND DEFERRED BILLS SHOULD BE RELEASED IN THEIR ENTIRITY.	C ADVLTAX	3135.16
LOWDER BETTY BARRINGER & HSB	2023-360	PROPERTY DISQUALIFIED FOR FAILURE TO COMPLETE 2022 COMPLIANCE REVIEW. TAXPAYER SUBMITTED COMPLIANCE REVIEW INFORMATION WITHIN 60 DAYS OF DISQUALIFICATION. PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM AND DEFERRED BILLS SHOULD BE RELEASED IN THEIR ENTIRITY.	C ADVLTAX	3135.16
LOWDER BETTY BARRINGER & HSB	2023-360	PROPERTY DISQUALIFIED FOR FAILURE TO COMPLETE 2022 COMPLIANCE REVIEW. TAXPAYER SUBMITTED COMPLIANCE REVIEW INFORMATION WITHIN 60 DAYS OF DISQUALIFICATION. PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM AND DEFERRED BILLS SHOULD BE RELEASED IN THEIR ENTIRITY.	FR17ADVLTAX	338.94
LOWDER BETTY BARRINGER & HSB	2023-361	PROPERTY DISQUALIFIED FOR FAILURE TO COMPLETE 2022 COMPLIANCE REVIEW. TAXPAYER SUBMITTED COMPLIANCE REVIEW	C ADVLTAX	3135.16

		INFORMATION WITHIN 60 DAYS OF DISQUALIFICATION. PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM AND DEFERRED BILLS SHOULD BE RELEASED IN THEIR ENTIRITY.		
LOWDER BETTY BARRINGER & HSB	2023-361	PROPERTY DISQUALIFIED FOR FAILURE TO COMPLETE 2022 COMPLIANCE REVIEW. TAXPAYER SUBMITTED COMPLIANCE REVIEW INFORMATION WITHIN 60 DAYS OF DISQUALIFICATION. PER G.S.105-296(J), PROPERTY IS REINSTATED INTO PRESENT USE PROGRAM AND DEFERRED BILLS SHOULD BE RELEASED IN THEIR ENTIRITY.	FR17ADVLTAX	381.30
MCCREA VANESSA AZALEE	2023-503338	TAX CODE/JURISDICTION CORRECTION; 105-381:	CI02ADVLTAX	143.24
MCCREA VANESSA AZALEE	2023-503338	TAX CODE/JURISDICTION CORRECTION; 105-381:	C ADVLTAX	220.83
MIKSCH BRIENDELLE JOHANNA	2023-503246	105381 TAX JURISDICTION.	CI02ADVLTAX	306.04
MIKSCH BRIENDELLE JOHANNA	2023-503246	105381 TAX JURISDICTION.	C ADVLTAX	471.81
NEWTON PAUL ROBERT	2022-77985	RELEASE/REFUND PER 105-381, DUE TO CLERICAL ERROR. 2022 BILL WAS NOT CALC WITH A PRESENT USE VALUE.	C ADVLTAX	981.98
NEWTON PAUL ROBERT	2022-77985	RELEASE/REFUND PER 105-381, DUE TO CLERICAL ERROR. 2022 BILL WAS NOT CALC WITH A PRESENT USE VALUE.	FR15ADVLTAX	168.53
THE CIRCE INSITUTE	2022-2540	CLERICAL ERROR/ILLEGAL TAX: 105-381	C PEN FEE	5.82
THE CIRCE INSITUTE	2022-2540	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02PEN FEE	3.77
THE CIRCE INSITUTE	2022-2540	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTADVLTAX	18.08
THE CIRCE INSITUTE	2022-2540	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTPEN FEE	1.81
THE CIRCE INSITUTE	2022-2540	CLERICAL ERROR/ILLEGAL TAX: 105-381	C ADVLTAX	58.16
THE CIRCE INSITUTE	2022-2541	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTADVLTAX	12.74
THE CIRCE INSITUTE	2022-2541	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02ADVLTAX	26.59
THE CIRCE INSITUTE	2022-2540	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02ADVLTAX	37.73
THE CIRCE INSITUTE	2022-2541	CLERICAL ERROR/ILLEGAL TAX: 105-381	C ADVLTAX	41.00
THE CIRCE INSITUTE	2022-2546	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02ADVLTAX	35.46
THE CIRCE INSITUTE	2022-2546	CLERICAL ERROR/ILLEGAL TAX: 105-381	C PEN FEE	16.40
THE CIRCE INSITUTE	2022-2546	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02PEN FEE	10.64
THE CIRCE INSITUTE	2022-2546	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTADVLTAX	16.99
THE CIRCE INSITUTE	2022-2546	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTPEN FEE	5.10
THE CIRCE INSITUTE	2022-2544	CLERICAL ERROR/ILLEGAL TAX: 105-381	C ADVLTAX	11.20
THE CIRCE INSITUTE	2022-2544	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02ADVLTAX	7.68
THE CIRCE INSITUTE	2022-2544	CLERICAL ERROR/ILLEGAL TAX: 105-381	C PEN FEE	6.72
THE CIRCE INSITUTE	2022-2544	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02PEN FEE	4.61
THE CIRCE INSITUTE	2022-2544	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTADVLTAX	3.68
THE CIRCE INSITUTE	2022-2543	CLERICAL ERROR/ILLEGAL TAX: 105-381	C ADVLTAX	44.16
THE CIRCE INSITUTE	2022-2543	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02ADVLTAX	29.44
THE CIRCE INSITUTE	2022-2543	CLERICAL ERROR/ILLEGAL TAX: 105-381	C PEN FEE	22.08
THE CIRCE INSITUTE	2022-2543	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02PEN FEE	14.72
THE CIRCE INSITUTE	2022-2543	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTADVLTAX	14.11
THE CIRCE INSITUTE	2022-2542	CLERICAL ERROR/ILLEGAL TAX: 105-381	C ADVLTAX	61.01
THE CIRCE INSITUTE	2022-2542	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02ADVLTAX	39.58
THE CIRCE INSITUTE	2022-2542	CLERICAL ERROR/ILLEGAL TAX: 105-381	C PEN FEE	24.40
THE CIRCE INSITUTE	2022-2542	CLERICAL ERROR/ILLEGAL TAX: 105-381	CI02PEN FEE	15.83
THE CIRCE INSITUTE	2022-2542	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTADVLTAX	18.96

THE CIRCE INSITUTE	2022-2542	CLERICAL ERROR/ILLEGAL TAX: 105-381	CIDTPEN FEE	7.58
THE CIRCE INSITUTE	2022-2546	CLERICAL ERROR/ILLEGAL TAX: 105-381	C ADVLTAX	54.67
WATSON ENJOLIE DIANE	2022-109110	GR VOIDED DUE TO EMPLOYER BEING A RELATIVE-CIVIL FEE RELEASED	CI04ADVLTAX	0.38
WATSON ENJOLIE DIANE	2022-109110	GR VOIDED DUE TO EMPLOYER BEING A RELATIVE-CIVIL FEE RELEASED	C ADVLTAX	0.44
WILCOX KAYANNA VICTORIA	2022-501357	TAX JURISDICTION 105381	CI02ADVLTAX	151.63
WILCOX KAYANNA VICTORIA	2022-501357	TAX JURISDICTION 105381	C ADVLTAX	233.76
XAYSOMBATH EMMANUELLE CASSIA LIMA	2023-503674	DUPLICATE TAXATION-105-381	CI04ADVLTAX	252.72
XAYSOMBATH EMMANUELLE CASSIA LIMA	2023-503674	DUPLICATE TAXATION-105-381	C ADVLTAX	296.84

North Carolina Vehicle Tax System

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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
ATKINSON, TAMMY JEANNETTE	ATKINSON, TAMMY JEANNETTE		844 OAK MANOR DR SE		CONCORD, NC 28025	Proration	0070885663	TMY4110	PENDING	280071432	Refund Generated due to proration on Bill #0070885663-2022-2022-0000-00	Vehicle Sold	05/30/2023	C ADVL	Tax	($40.95)	$0.00	($40.95)
														CI02ADVL	Tax	($26.56)	$0.00	($26.56)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$67.51
BALLARD, JASON ROZZELLE	BALLARD, JASON ROZZELLE	BALLARD, ALISON HARKEY	199 OAKDALE AVE		KANNAPOLIS, NC 28083	Proration	0000785758	TDA1884	PENDING	279627414	Refund Generated due to proration on Bill #0000785758-2021-2021-0000-00	Vehicle Sold	05/25/2023	C ADVL	Tax	($7.97)	$0.00	($7.97)
														CI04ADVL	Tax	($6.78)	$0.00	($6.78)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$14.75
BANNING, CHADWICK SOLOMON	BANNING, CHADWICK SOLOMON	BANNING, KELLY LOUQUE	1097 AIRPORT RD		PAGELAND, SC 29728	Proration	0054987811	PHA6168	PENDING	277738779	Refund Generated due to proration on Bill #0054987811-2022-2022-0000-00	Reg . Out of state	05/01/2023	C ADVL	Tax	($55.37)	$0.00	($55.37)
														CI02ADVL	Tax	($35.92)	$0.00	($35.92)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$91.29
BANNING, CHADWICK SOLOMON	BANNING, CHADWICK SOLOMON		1097 AIRPORT RD		PAGELAND, SC 29728	Proration	0069358129	7Y7340	PENDING	277738785	Refund Generated due to proration on Bill #0069358129-2022-2022-0000-00	Reg . Out of state	05/01/2023	C ADVL	Tax	($15.22)	($0.76)	($15.98)
														CI02ADVL	Tax	($9.87)	($0.49)	($10.36)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$26.34
BARANUK, NOELLE MARIE DONOVAN	BARANUK, NOELLE MARIE DONOVAN	BARANUK, MATTHEW WALTER	8826 THATCHER PL		HARRISBURG, NC 28075	Proration	0067791303	JJS1011	PENDING	185894246	Refund Generated due to proration on Bill #0067791303-2022-2022-0000-00	Processed in error	05/15/2023	C ADVL	Tax	($192.27)	$0.00	($192.27)
														CI01ADVL	Tax	($113.02)	$0.00	($113.02)
																	Refund	$305.29
BARBEE, KEVIN JAMES	BARBEE, KEVIN JAMES	BARBEE, BETH HATLEY	560 HERMITAGE DR SE		CONCORD, NC 28025	Proration	0024708476	CJP4253	PENDING	278348877	Refund Generated due to proration on Bill #0024708476-2021-2021-0000-00	Vehicle Sold	05/09/2023	C ADVL	Tax	($6.42)	$0.00	($6.42)
														CI02ADVL	Tax	($4.16)	$0.00	($4.16)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$10.58
BARKAT, SHAHNAZ	BARKAT, SHAHNAZ		2180 WOODSTREAM RD		HARRISBURG, NC 28075	Proration	0068091664	JMR6638	PENDING	186235098	Refund Generated due to proration on Bill #0068091664-2022-2022-0000-00	Vehicle Sold	05/22/2023	C ADVL	Tax	($18.74)	$0.00	($18.74)
														CI01ADVL	Tax	($11.02)	$0.00	($11.02)
																	Refund	$29.76
BARNES, KIM ELLEN	BARNES, KIM ELLEN	BARNES, ROBERT LEE	223 CANVASBACK CT SE		CONCORD, NC 28025	Proration	0066280547	JHK5914	PENDING	278124297	Refund Generated due to proration on Bill #0066280547-2021-2021-0000-00	Vehicle Totalled	05/05/2023	C ADVL	Tax	($33.20)	$0.00	($33.20)
														CI02ADVL	Tax	($21.54)	$0.00	($21.54)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$54.74
BEEP BEEP RENTALS LLC	BEEP BEEP RENTALS LLC		2233 SILVER PINE ST		CONCORD, NC 28027	Proration	0063839632	JKJ4616	PENDING	278853789	Refund Generated due to proration on Bill #0063839632-2022-2022-0000-00	Vehicle Totalled	05/16/2023	C ADVL	Tax	($71.53)	$0.00	($71.53)
														CI04ADVL	Tax	($60.89)	$0.00	($60.89)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$132.42
BHARAL, ABHISHEK	BHARAL, ABHISHEK		9520 PRESSLEY DR NW		CONCORD, NC 28027	Proration	0069846154	TDB2370	PENDING	278841081	Refund Generated due to proration on Bill #0069846154-2022-2022-0000-00	Vehicle Sold	05/15/2023	C ADVL	Tax	($84.81)	$0.00	($84.81)
														CI02ADVL	Tax	($55.01)	$0.00	($55.01)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$139.82
BOONE, JAN BELK	BOONE, JAN BELK		907 CHIPOLA ST		KANNAPOLIS, NC 28083	Proration	0064200963	JMA5844	PENDING	277738548	Refund Generated due to proration on Bill #0064200963-2021-2021-0000-00	Vehicle Sold	05/01/2023	C ADVL	Tax	($104.14)	$0.00	($104.14)
														CI04ADVL	Tax	($88.66)	$0.00	($88.66)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$192.80
BRANDLE, MATTHEW JAMES	BRANDLE, MATTHEW JAMES	BRANDLE, JENNIFER KATHLEEN	10012 LEGOLAS LN		CHARLOTTE, NC 28269	Proration	0056908412	RAD1611	PENDING	279627627	Refund Generated due to proration on Bill #0056908412-2022-2022-0000-00	Vehicle Totalled	05/25/2023	C ADVL	Tax	($51.33)	$0.00	($51.33)
														CI02ADVL	Tax	($33.29)	$0.00	($33.29)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$84.62
BREEN, STEVEN RAYMOND	BREEN, STEVEN RAYMOND		9664 EVANSTON ST NW		CONCORD, NC 28027	Proration	0070175393	KEL2178	PENDING	278123796	Refund Generated due to proration on Bill #0070175393-2022-2022-0000-00	Vehicle Sold	05/05/2023	C ADVL	Tax	($38.13)	$0.00	($38.13)
														CI02ADVL	Tax	($24.73)	$0.00	($24.73)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$62.86
BROWN, SHAKIEMA TONI	BROWN, SHAKIEMA TONI		613 EVELYN AVE		KANNAPOLIS, NC 28083	Proration	0058625857	FME6059	PENDING	278853861	Refund Generated due to proration on Bill #0058625857-2022-2022-0000-00	Vehicle Sold	05/16/2023	C ADVL	Tax	($10.54)	$0.00	($10.54)
														CI04ADVL	Tax	($8.97)	$0.00	($8.97)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$19.51
BROWN, SHERRY LENELL	BROWN, SHERRY LENELL	WRIGHT, MARCUS DUVON JR	555 WOODARD WAY NW		CONCORD, NC 28027	Proration	0067777039	HEW6811	PENDING	278217759	Refund Generated due to proration on Bill #0067777039-2022-2022-0000-00	Vehicle Sold	05/08/2023	C ADVL	Tax	($19.09)	$0.00	($19.09)
														CI02ADVL	Tax	($12.38)	$0.00	($12.38)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$31.47
CACHINE, ROBERT EDWARD JR	CACHINE, ROBERT EDWARD JR		9916 HOLLY TREE DR		CHARLOTTE, NC 28215	Proration	0047817116	TCZ8695	PENDING	186714086	Refund Generated due to proration on Bill #0047817116-2021-2021-0000-00	Vehicle Sold	05/30/2023	C ADVL	Tax	($2.44)	$0.00	($2.44)
														FR07ADVL	Tax	($0.49)	$0.00	($0.49)
																	Refund	$2.93
CALDWELL, ROBERT CAROL	CALDWELL, ROBERT CAROL		464 LIBERTY DR SW		CONCORD, NC 28027	Proration	0069382756	HD3156C	PENDING	279352371	Refund Generated due to proration on Bill #0069382756-2022-2022-0000-00	Vehicle Sold	05/22/2023	C ADVL	Tax	($8.91)	($0.44)	($9.35)
														CI02ADVL	Tax	($5.78)	($0.29)	($6.07)

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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
CAROL	CAROL										#0069382756-2022-2022-0000-00			CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$15.42
CARNEY, ROBERT JAMES	CARNEY, ROBERT JAMES		272 LEMON TREE LN SW		CONCORD, NC 28025	Proration	0070432304	KDZ9887	PENDING	277920153	Refund Generated due to proration on Bill #0070432304-2022-2022-0000-00	Vehicle Sold	05/03/2023	C ADVL	Tax	($9.71)	$0.00	($9.71)
														CI02ADVL	Tax	($6.30)	$0.00	($6.30)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$16.01
CAUDLE, JAMES COREY	CAUDLE, JAMES COREY		3107 CHAPWIN CIRCLE NW APT A		CONCORD, NC 28027	Proration	0071394797	REE6061	PENDING	278960685	Refund Generated due to proration on Bill #0071394797-2022-2022-0000-00	Vehicle Totalled	05/17/2023	C ADVL	Tax	($52.41)	$0.00	($52.41)
														CI02ADVL	Tax	($34.00)	$0.00	($34.00)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$86.41
CLARK, ALEXANDER GREGORY	CLARK, ALEXANDER GREGORY		5220 HILDRETH CT		CONCORD, NC 28025	Proration	0071462163	JKS9774	PENDING	186045000	Refund Generated due to proration on Bill #0071462163-2022-2022-0000-00	Vehicle Sold	05/18/2023	C ADVL	Tax	($22.59)	$0.00	($22.59)
														FR04ADVL	Tax	($2.75)	$0.00	($2.75)
																	Refund	$25.34
CLARK, TRACY OUIMET	CLARK, TRACY OUIMET		14611 MARGLEN DR		MIDLAND, NC 28107	Adjustment < $100	0072046019	TLV4774	PENDING	371131232	Refund Generated due to adjustment on Bill #0072046019-2022-2022-0000	Situs error	05/09/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($3.84)	$0.00	($3.84)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														CI06ADVL	Tax	$1.76	$0.00	$1.76
																	Refund	$32.08
CLOUTIER, RENEE LYNN	CLOUTIER, RENEE LYNN		1208 MANOR OAK PL NW		CONCORD, NC 28027	Proration	0065773310	JCJ9905	PENDING	280071276	Refund Generated due to proration on Bill #0065773310-2021-2021-0000-00	Vehicle Sold	05/30/2023	C ADVL	Tax	($12.21)	$0.00	($12.21)
														CI02ADVL	Tax	($7.92)	$0.00	($7.92)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$20.13
COCHRAN, LINDSEY MORGAN	COCHRAN, LINDSEY MORGAN		6318 ASHROCK PLACE SW		CONCORD, NC 28025	Proration	0060072128	HMZ3648	PENDING	278841078	Refund Generated due to proration on Bill #0060072128-2022-2022-0000-00	Vehicle Sold	05/15/2023	C ADVL	Tax	($333.12)	$0.00	($333.12)
														CI02ADVL	Tax	($216.08)	$0.00	($216.08)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$549.20
COOK, JEFFREY WAYNE	COOK, JEFFREY WAYNE	COOK, KRISTINA LORENE TUTTEROW	302 CALDWELL ST		KANNAPOLIS, NC 28083	Proration	0066837790	JHS6693	PENDING	277776384	Refund Generated due to proration on Bill #0066837790-2021-2021-0000-00	Vehicle Sold	05/02/2023	C ADVL	Tax	($21.18)	$0.00	($21.18)
														CI04ADVL	Tax	($18.03)	$0.00	($18.03)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$39.21
DAMICO, MICHAEL JOHN	DAMICO, MICHAEL JOHN		2727 TYNDALL DR NW		CONCORD, NC 28027	Proration	0052712752	HCA1115	PENDING	278217990	Refund Generated due to proration on Bill #0052712752-2021-2021-0000-00	Vehicle Sold	05/08/2023	C ADVL	Tax	($17.66)	$0.00	($17.66)
														CI02ADVL	Tax	($11.46)	$0.00	($11.46)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$29.12
DAMRON, JAMES OLIVER III	DAMRON, JAMES OLIVER III		585 MARIGOLD RD		SPENCER, VA 24165	Proration	0068046740	YT2928	PENDING	277919835	Refund Generated due to proration on Bill #0068046740-2021-2021-0000-00	Vehicle Sold	05/03/2023	C ADVL	Tax	($121.67)	$0.00	($121.67)
														CI02ADVL	Tax	($78.92)	$0.00	($78.92)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$200.59
DETAR, DONNA ROMANS	DETAR, DONNA ROMANS		325 BETHEL CHURCH RD		MOUNT PLEASANT, NC 28124	Adjustment < $100	0066067652	FEM8359	PENDING	371804416	Refund Generated due to adjustment on Bill #0066067652-2021-2021-0000	Situs error	05/16/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($46.61)	$0.00	($46.61)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR15ADVL	Tax	$12.33	$0.00	$12.33
																	Refund	$64.28
DETAR, DONNA ROMANS	DETAR, DONNA ROMANS		325 BETHEL CHURCH RD		MOUNT PLEASANT, NC 28124	Adjustment < $100	0071780065	FEM8359	PENDING	371804420	Refund Generated due to adjustment on Bill #0071780065-2022-2022-0000	Situs error	05/16/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($43.20)	$0.00	($43.20)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR15ADVL	Tax	$11.43	$0.00	$11.43
																	Refund	$61.77
DICKEY, MATTHEW GENE	DICKEY, MATTHEW GENE		5509 LEATHERWOOD LN		HARRISBURG, NC 28075	Proration	0008516129	S7589	PENDING	186245386	Refund Generated due to proration on Bill #0008516129-2022-2022-0000-00	Vehicle Sold	05/23/2023	C ADVL	Tax	($57.93)	$0.00	($57.93)
														CI01ADVL	Tax	($34.05)	$0.00	($34.05)
																	Refund	$91.98
DOTY, JAMES RAYMOND SR	DOTY, JAMES RAYMOND SR		4943 WHEELER RD		CONCORD, NC 28025	Adjustment < $100	0071090215	93614	PENDING	186234746	Refund Generated due to adjustment on Bill #0071090215-2022-2022-0000-00	Adjustment	05/22/2023	C ADVL	Tax	($18.20)	$0.00	($18.20)
														FR16ADVL	Tax	($2.90)	$0.00	($2.90)
																	Refund	$21.10
DOTY, JAMES RAYMOND SR	DOTY, JAMES RAYMOND SR		4943 WHEELER RD		CONCORD, NC 28025	Adjustment < $100	0047261774	FHF5800	PENDING	186234752	Refund Generated due to adjustment on Bill #0047261774-2022-2022-0000-00	Adjustment	05/22/2023	C ADVL	Tax	($31.20)	$0.00	($31.20)
														FR16ADVL	Tax	($4.97)	$0.00	($4.97)
																	Refund	$36.17
DOWE, JOSEPH ROYAL	DOWE, JOSEPH ROYAL	DOWE, KARLA MARIE	10186 FALLING LEAF DR NW		CONCORD, NC 28027	Proration	0052384386	HHD2042	PENDING	278217594	Refund Generated due to proration on Bill #0052384386-2022-2022-0000-00	Vehicle Totalled	05/08/2023	C ADVL	Tax	($114.57)	$0.00	($114.57)
														CI02ADVL	Tax	($74.32)	$0.00	($74.32)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$188.89
DRYE, BRENDA FINK	DRYE, BRENDA FINK		115 TRADEWIND LN		CONCORD, NC 28025	Proration	0000889638	TDH4985	PENDING	186245868	Refund Generated due to proration on Bill #0000889638-2022-2022-0000-00	Vehicle Sold	05/23/2023	C ADVL	Tax	($15.09)	$0.00	($15.09)
														FR04ADVL	Tax	($1.83)	$0.00	($1.83)

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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
			LN								#0000889638-2022-						Refund	$16.92
FEASER, FELICIA DANIEL	FEASER, FELICIA DANIEL		2387 BAXTER PL SE		CONCORD, NC 28025	Proration	0052875780	HAC4840	PENDING	279627486	Refund Generated due to proration on Bill #0052875780-2022-2022-0000-00	Vehicle Sold	05/25/2023	C ADVL	Tax	($111.04)	$0.00	($111.04)
														CI02ADVL	Tax	($72.03)	$0.00	($72.03)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$183.07
FERGUSON, JULIE ANN	FERGUSON, JULIE ANN		373 ROYAL LILY TRAIL		MONTGOMERY, TX 77316	Proration	0025904482	10SNE10	PENDING	278446728	Refund Generated due to proration on Bill #0025904482-2021-2021-0000-00	Reg . Out of state	05/10/2023	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
FERGUSON, MARK JOHN	FERGUSON, MARK JOHN		373 ROYAL LILY TRAIL		MONTGOMERY, TX 77316	Proration	0064669769	ADM6206	PENDING	278446749	Refund Generated due to proration on Bill #0064669769-2021-2021-0000-00	Reg . Out of state	05/10/2023	C ADVL	Tax	($9.47)	$0.00	($9.47)
														CI02ADVL	Tax	($6.14)	$0.00	($6.14)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$15.61
FISCHBECK, BEN	FISCHBECK, BEN		424 S MAIN ST		KANNAPOLIS, NC 28081	Proration	0069546228	TLP9886	PENDING	279627231	Refund Generated due to proration on Bill #0069546228-2022-2022-0000-00	Vehicle Sold	05/25/2023	C ADVL	Tax	($107.92)	$0.00	($107.92)
														CI04ADVL	Tax	($91.87)	$0.00	($91.87)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$199.79
FOX, JACKIE LYNN	FOX, JACKIE LYNN		1624 MORNINGSIDE CT		KANNAPOLIS, NC 28081	Proration	0069066290	KDC2488	PENDING	278348835	Refund Generated due to proration on Bill #0069066290-2022-2022-0000-00	Vehicle Sold	05/09/2023	C ADVL	Tax	($46.77)	$0.00	($46.77)
														CI04ADVL	Tax	($39.81)	$0.00	($39.81)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$86.58
GALARZA RAMIREZ, LUIS ROBERTO	GALARZA RAMIREZ, LUIS ROBERTO		3043 TALLEDAGA LN SW		CONCORD, NC 28025	Proration	0070914995	TMY4999	PENDING	280070913	Refund Generated due to proration on Bill #0070914995-2022-2022-0000-00	Vehicle Sold	05/30/2023	C ADVL	Tax	($11.72)	$0.00	($11.72)
														CI02ADVL	Tax	($7.60)	$0.00	($7.60)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$19.32
GANDY, RICHARD LEE	GANDY, RICHARD LEE		781 KING FREDRICK LN SW		CONCORD, NC 28027	Proration	0047303411	7H4038	PENDING	279506538	Refund Generated due to proration on Bill #0047303411-2022-2022-0000-00	Vehicle Sold	05/24/2023	C ADVL	Tax	($37.03)	$0.00	($37.03)
														CI02ADVL	Tax	($24.03)	$0.00	($24.03)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$61.06
GARMON, JAMES GROVER	GARMON, JAMES GROVER		114 LOUISE DR SE		CONCORD, NC 28025	Proration	0057792337	EHD2399	PENDING	278029440	Refund Generated due to proration on Bill #0057792337-2022-2022-0000-00	Vehicle Sold	05/04/2023	C ADVL	Tax	($125.58)	$0.00	($125.58)
														CI02ADVL	Tax	($81.46)	$0.00	($81.46)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$237.04
GARMON, JAMES GROVER	GARMON, JAMES GROVER		114 LOUISE DR SE		CONCORD, NC 28025	Proration	0069844747	NY5151	PENDING	278029449	Refund Generated due to proration on Bill #0069844747-2022-2022-0000-00	Vehicle Totalled	05/04/2023	C ADVL	Tax	($229.41)	$0.00	($229.41)
														CI02ADVL	Tax	($148.81)	$0.00	($148.81)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$378.22
GEHRINGER, KEENA MARIA	GEHRINGER, KEENA MARIA		7016 WATERWHEEL ST SW		CONCORD, NC 28025	Proration	0067820993	JJR5229	PENDING	278447466	Refund Generated due to proration on Bill #0067820993-2022-2022-0000-00	Vehicle Sold	05/10/2023	C ADVL	Tax	($211.55)	$0.00	($211.55)
														CI02ADVL	Tax	($137.22)	$0.00	($137.22)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$348.77
GOENNER, CHRISTOPHER DANIEL	GOENNER, CHRISTOPHER DANIEL		29 CABARRUS AVE	APT 106	CONCORD, NC 28025	Proration	0069853216	C1491	PENDING	280071489	Refund Generated due to proration on Bill #0069853216-2022-2022-0000-00	Vehicle Sold	05/30/2023	C ADVL	Tax	($73.17)	$0.00	($73.17)
														CI02ADVL	Tax	($47.46)	$0.00	($47.46)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$120.63
GOFF, GINA MINZENMAYER	GOFF, GINA MINZENMAYER		4655 HIGHWAY 73 E		CONCORD, NC 28025	Adjustment >= $100	0071668285	93860	PENDING	186498512	Refund Generated due to adjustment on Bill #0071668285-2022-	Adjustment	05/26/2023	C ADVL	Tax	($247.90)	$0.00	($247.90)
														FR03ADVL	Tax	($26.80)	$0.00	($26.80)
																	Refund	$274.70
GOFF, GINA MINZENMAYER	GOFF, GINA MINZENMAYER		4655 HIGHWAY 73 E		CONCORD, NC 28025	Adjustment < $100	0066032419	KAF8592	PENDING	372996732	Refund Generated due to adjustment on Bill #0066032419-2021-2021-0000	Situs error	05/26/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($2.69)	$0.00	($2.69)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR03ADVL	Tax	$0.45	$0.00	$0.45
																	Refund	$32.24
GOFF, GINA MINZENMAYER	GOFF, GINA MINZENMAYER		4655 HIGHWAY 73 E		CONCORD, NC 28025	Adjustment < $100	0066033405	KAF8595	PENDING	372996756	Refund Generated due to adjustment on Bill #0066033405-2021-2021-0000	Situs error	05/26/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($4.51)	$0.00	($4.51)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR03ADVL	Tax	$0.75	$0.00	$0.75
																	Refund	$33.76
GOFF, GINA MINZENMAYER	GOFF, GINA MINZENMAYER		4655 HIGHWAY 73 E		CONCORD, NC 28025	Adjustment < $100	0066033319	KAF8594	PENDING	372996760	Refund Generated due to adjustment on Bill #0066033319-2021-2021-0000	Situs error	05/26/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($22.61)	$0.00	($22.61)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR03ADVL	Tax	$3.77	$0.00	$3.77
																	Refund	$48.84

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NCVTS Pending Refund report

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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
GOFF, GINA MINZENMAYER	GOFF, GINA MINZENMAYER		4655 HIGHWAY 73 E		CONCORD, NC 28025	Adjustment < $100	0066032667	KAF8593	PENDING	372997020	Refund Generated due to adjustment on Bill #0066032667-2021-2021-0000	Situs error	05/26/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($15.26)	$0.00	($15.26)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR03ADVL	Tax	$2.54	$0.00	$2.54
																	Refund	$42.72
GOFF, GINA MINZENMAYER	GOFF, GINA MINZENMAYER		4655 HIGHWAY 73 E		CONCORD, NC 28025	Adjustment < $100	0066032963	CN61708	PENDING	372997392	Refund Generated due to adjustment on Bill #0066032963-2021-2021-0000	Situs error	05/26/2023	C ADVL	Tax	($21.61)	$0.00	($21.61)
														CI02ADVL	Tax	($15.46)	$0.00	($15.46)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR03ADVL	Tax	$0.24	$0.00	$0.24
																	Refund	$66.83
GOFF, GINA MINZENMAYER	GOFF, GINA MINZENMAYER		4655 HIGHWAY 73 E		CONCORD, NC 28025	Adjustment < $100	0066033057	CN61709	PENDING	372997400	Refund Generated due to adjustment on Bill #0066033057-2021-2021-0000	Situs error	05/26/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($2.40)	$0.00	($2.40)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR03ADVL	Tax	$0.40	$0.00	$0.40
																	Refund	$32.00
GOLDEN EMPIRE TRANSIT LIMOUSIE & SHUTTLE	GOLDEN EMPIRE TRANSIT LIMOUSIE & SHUTTLE		2727 FISHERMANS DR NW		CONCORD, NC 28027	Proration	0069316333	KCL4132	PENDING	280071018	Refund Generated due to proration on Bill #0069316333-2022-2022-0000-00	Annual Tag	05/30/2023	C ADVL	Tax	($465.59)	$0.00	($465.59)
														CI02ADVL	Tax	($302.01)	$0.00	($302.01)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$797.60
GOODMAN, PHILLIP MICHAEL	GOODMAN, PHILLIP MICHAEL	GOODMAN, JEANNE CHISHOLM	1005 CENTRAL DR		KANNAPOLIS, NC 28083	Adjustment < $100	0072092035	93996	PENDING	279747771	Refund Generated due to adjustment on Bill #0072092035-2022-2022-0000-00	Adjustment	05/26/2023	C ADVL	Tax	($47.73)	$0.00	($47.73)
														CI04ADVL	Tax	($40.64)	$0.00	($40.64)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$88.37
GORDON, MARK STEVEN JR	GORDON, MARK STEVEN JR		613 WILMAR ST NW		CONCORD, NC 28025	Proration	0070120628	REA6891	PENDING	278124135	Refund Generated due to proration on Bill #0070120628-2022-2022-0000-00	Vehicle Sold	05/05/2023	C ADVL	Tax	($73.01)	$0.00	($73.01)
														CI02ADVL	Tax	($47.36)	$0.00	($47.36)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$120.37
GRAY, RANDY	GRAY, RANDY		1211 DANBROOKE DR		CONCORD, NC 28025	Proration	0066262563	TJE1786	PENDING	186111906	Refund Generated due to proration on Bill #0066262563-2021-	Vehicle Sold	05/19/2023	C ADVL	Tax	($9.75)	$0.00	($9.75)
														FR04ADVL	Tax	($0.99)	$0.00	($0.99)
																	Refund	$10.74
HARGETT, BRANDON RAY	HARGETT, BRANDON RAY		3704 DAKEITA CIR		CONCORD, NC 28025	Proration	0062205547	ZNV1479	PENDING	186498298	Refund Generated due to proration on Bill #0062205547-2022-	Vehicle Sold	05/26/2023	C ADVL	Tax	($14.24)	$0.00	($14.24)
														FR14ADVL	Tax	($1.92)	$0.00	($1.92)
																	Refund	$16.16
HATFIELD, REBECCA KATHERINE	HATFIELD, REBECCA KATHERINE		825 DALE EARNHARDT BLVD		KANNAPOLIS, NC 28081	Proration	0058438139	JAD4328	PENDING	278534997	Refund Generated due to proration on Bill #0058438139-2022-2022-0000-00	Vehicle Totalled	05/11/2023	C ADVL	Tax	($52.58)	$0.00	($52.58)
														CI04ADVL	Tax	($44.76)	$0.00	($44.76)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$97.34
HAWKINS, JOSEPH RICHARD	HAWKINS, JOSEPH RICHARD	HAWKINS, PATRICIA ODOM	5092 VILLAGE WAY		HAHIRA, GA 31632	Proration	0067056485	KBX6310	PENDING	280070583	Refund Generated due to proration on Bill #0067056485-2021-2021-0000-00	Reg . Out of state	05/30/2023	C ADVL	Tax	($55.87)	$0.00	($55.87)
														CI02ADVL	Tax	($36.24)	$0.00	($36.24)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$92.11
HAWKINS, JOSEPH RICHARD	HAWKINS, JOSEPH RICHARD	HAWKINS, PATRICIA ODOM	5092 VILLAGE WAY		HAHIRA, GA 31632	Proration	0000803596	AHB1829	PENDING	280070589	Refund Generated due to proration on Bill #0000803596-2022-2022-0000-00	Reg . Out of state	05/30/2023	C ADVL	Tax	($28.88)	$0.00	($28.88)
														CI02ADVL	Tax	($18.73)	$0.00	($18.73)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$47.61
HEAFNER, JULIE LYNN	HEAFNER, JULIE LYNN	HEAFNER, DARRYL LANE	1324 FOREST BLUFF DR		MIDLAND, NC 28107	Proration	0038877897	DLF6947	PENDING	186111968	Refund Generated due to proration on Bill #0038877897-2022-	Vehicle Sold	05/19/2023	C ADVL	Tax	($64.62)	$0.00	($64.62)
														CI06ADVL	Tax	($19.21)	$0.00	($19.21)
																	Refund	$83.83
HEAVENLY CAKES COMPANY	HEAVENLY CAKES COMPANY	MEHTA, DARSHY JAGDISH	9715 CAPELLA AVE NW		CONCORD, NC 28027	Proration	0064391138	FAE7866	PENDING	279168066	Refund Generated due to proration on Bill #0064391138-2022-2022-0000-00	Vehicle Sold	05/19/2023	C ADVL	Tax	($99.01)	$0.00	($99.01)
														CI02ADVL	Tax	($64.22)	$0.00	($64.22)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$163.23
HELMS, CAROLYN OVERCASH	HELMS, CAROLYN OVERCASH	HELMS, VAN ERVIN	5225 KANNAPOLIS PKWY		KANNAPOLIS, NC 28081	Proration	0029098482	JAK1190	PENDING	278534757	Refund Generated due to proration on Bill #0029098482-2022-2022-0000-00	Vehicle Totalled	05/11/2023	C ADVL	Tax	($44.46)	$0.00	($44.46)
														CI04ADVL	Tax	($37.85)	$0.00	($37.85)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$82.31
HENRY, JOHN WILLIAM	HENRY, JOHN WILLIAM		10931 TAILWATER ST		DAVIDSON, NC 28036	Proration	0056920172	DLP6567	PENDING	279352194	Refund Generated due to proration on Bill #0056920172-2022-2022-0000-00	Vehicle Sold	05/22/2023	C ADVL	Tax	($120.20)	$0.00	($120.20)
														CI04ADVL	Tax	($102.34)	$0.00	($102.34)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$222.54
HENSLEY, PATRICK LAYVAN	HENSLEY, PATRICK LAYVAN		8675 WATERLYNN CIR NW	APT 306	CONCORD, NC 28027	Proration	0070548167	KFL1087	PENDING	278124216	Refund Generated due to proration on Bill #0070548167-2022-	Vehicle Sold	05/05/2023	C ADVL	Tax	($27.80)	$0.00	($27.80)
														CI02ADVL	Tax	($18.04)	$0.00	($18.04)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00

North Carolina Vehicle Tax System

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Report Date 6/2/2023 8:58:54 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
											2022-0000-00						Refund	$45.84
HILL, WANDA PRUDEN	HILL, WANDA PRUDEN		1560 OAKWOOD AVE		KANNAPOLIS, NC 28081	Proration	0069828515	TMH5392	PENDING	279748275	Refund Generated due to proration on Bill #0069828515-2022-2022-0000-00	Vehicle Totalled	05/26/2023	C ADVL	Tax	($159.97)	$0.00	($159.97)
														CI04ADVL	Tax	($136.20)	$0.00	($136.20)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$296.17
HILL, WANDA PRUDEN	HILL, WANDA PRUDEN		1560 OAKWOOD AVE		KANNAPOLIS, NC 28081	Proration	0070230137	KEJ7240	PENDING	278853777	Refund Generated due to proration on Bill #0070230137-2022-2022-0000-00	Vehicle Sold	05/16/2023	C ADVL	Tax	($29.45)	$0.00	($29.45)
														CI04ADVL	Tax	($25.07)	$0.00	($25.07)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$54.52
HOGAN, ROBERT SCOTT	HOGAN, ROBERT SCOTT		17 HAWTHORNE ST SW		CONCORD, NC 28027	Proration	0059174231	CM65700	PENDING	277776660	Refund Generated due to proration on Bill #0059174231-2022-2022-0000-00	Vehicle Sold	05/02/2023	C ADVL	Tax	($206.46)	$0.00	($206.46)
														CI02ADVL	Tax	($133.92)	$0.00	($133.92)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$340.38
HOPKINS, MICHAEL JEREMIAH	HOPKINS, MICHAEL JEREMIAH	HOPKINS, GEORGIANN	1367 RAINBOW DR		KANNAPOLIS, NC 28081	Proration	0068268269	KBP6885	PENDING	277776591	Refund Generated due to proration on Bill #0068268269-2022-2022-0000-00	Vehicle Sold	05/02/2023	C ADVL	Tax	($13.37)	$0.00	($13.37)
														CI04ADVL	Tax	($11.39)	$0.00	($11.39)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$24.76
HUMPHRIES, MICHAEL WADE	HUMPHRIES, MICHAEL WADE		3995 TOWN CENTER RD		HARRISBURG, NC 28075	Proration	0070845004	91481	PENDING	185974046	Refund Generated due to proration on Bill #0070845004-2022-	Vehicle Sold	05/17/2023	C ADVL	Tax	($10.35)	$0.00	($10.35)
														CI01ADVL	Tax	($6.08)	$0.00	($6.08)
																	Refund	$16.43
ICHI JAPANESE EXPRESS LLC	ICHI JAPANESE EXPRESS LLC		5701 WOODRIDGE CT NW		CONCORD, NC 28027	Proration	0070279879	REL7553	PENDING	186418464	Refund Generated due to proration on Bill #0070279879-2022-	Vehicle Sold	05/25/2023	C ADVL	Tax	($26.59)	$0.00	($26.59)
														CI01ADVL	Tax	($15.63)	$0.00	($15.63)
																	Refund	$42.22
ISENHOUR, SUMMER DOCKERY	ISENHOUR, SUMMER DOCKERY		32 ACADEMY AVE NW		CONCORD, NC 28025	Proration	0052633302	DHA4256	PENDING	278535237	Refund Generated due to proration on Bill #0052633302-2021-2021-0000-00	Vehicle Sold	05/11/2023	C ADVL	Tax	($16.96)	$0.00	($16.96)
														CI02ADVL	Tax	($11.00)	$0.00	($11.00)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$27.96
JACOBSON, CHRISTOPHER LAWRENCE	JACOBSON, CHRISTOPHER LAWRENCE	ELLIS, CYNTHIA ANN	401 KNOLLWOOD DR		KANNAPOLIS, NC 28083	Proration	0033457527	YNK6459	PENDING	279067275	Refund Generated due to proration on Bill #0033457527-2021-2021-0000-00	Vehicle Sold	05/18/2023	C ADVL	Tax	($148.54)	$0.00	($148.54)
														CI04ADVL	Tax	($126.46)	$0.00	($126.46)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$275.00
JAKUBEK, LADISLAV FRANK	JAKUBEK, LADISLAV FRANK	JAKUBEK, ANNA MARIE	1018 REMBRANDT DR SW		CONCORD, NC 28027	Proration	0014322755	TEZ4854	PENDING	277738572	Refund Generated due to proration on Bill #0014322755-2022-2022-0000-00	Vehicle Sold	05/01/2023	C ADVL	Tax	($5.55)	$0.00	($5.55)
														CI02ADVL	Tax	($3.60)	$0.00	($3.60)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$9.15
KELLER, CHASE ALEXANDER	KELLER, CHASE ALEXANDER		4456 BACK CREEK CHURCH RD		CHARLOTTE, NC 28213	Proration	0071160532	JCW9574	PENDING	279368700	Refund Generated due to proration on Bill #0071160532-2022-2022-0000-00	Vehicle Sold	05/23/2023	C ADVL	Tax	($96.32)	$0.00	($96.32)
														CI02ADVL	Tax	($62.48)	$0.00	($62.48)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$158.80
LENTZ, DANIEL LEE	LENTZ, DANIEL LEE	LENTZ, SUZANNE EUDY	402 IRIS AVE		KANNAPOLIS, NC 28083	Proration	0014308573	TFW1343	PENDING	279506556	Refund Generated due to proration on Bill #0014308573-2022-2022-0000-00	Vehicle Sold	05/24/2023	C ADVL	Tax	($16.87)	$0.00	($16.87)
														CI04ADVL	Tax	($14.36)	$0.00	($14.36)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$31.23
LETMAN, WHITNEY ABRIEL	LETMAN, WHITNEY ABRIEL		233 MCGILL AVE NW		CONCORD, NC 28025	Proration	0068327989	KBL5651	PENDING	279368742	Refund Generated due to proration on Bill #0068327989-2022-2022-0000-00	Vehicle Sold	05/23/2023	C ADVL	Tax	($45.63)	$0.00	($45.63)
														CI02ADVL	Tax	($29.60)	$0.00	($29.60)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$75.23
LEVITT, RICHARD MARC	LEVITT, RICHARD MARC		8700 BAYBERRY TRL		CONCORD, NC 28027	Proration	0064349029	FCY6436	PENDING	185689912	Refund Generated due to proration on Bill #0064349029-2022-	Vehicle Sold	05/11/2023	C ADVL	Tax	($205.06)	$0.00	($205.06)
														FR11ADVL	Tax	($18.85)	$0.00	($18.85)
																	Refund	$223.91
LISBY, ADDIE HUDSON	LISBY, ADDIE HUDSON		7990 WILLS RUN PL		HARRISBURG, NC 28075	Proration	0064213542	JMD9740	PENDING	186498320	Refund Generated due to proration on Bill #0064213542-2022-	Vehicle Totalled	05/26/2023	C ADVL	Tax	($23.86)	$0.00	($23.86)
														CI01ADVL	Tax	($14.03)	$0.00	($14.03)
																	Refund	$37.89
LOPEZ UGARTE, HENRY MARTIN	LOPEZ UGARTE, HENRY MARTIN		9753 WALTHAM CT		CHARLOTTE, NC 28269	Proration	0069975659	RDK2473	PENDING	279627780	Refund Generated due to proration on Bill #0069975659-2022-2022-0000-00	Vehicle Sold	05/25/2023	C ADVL	Tax	($129.16)	$0.00	($129.16)
														CI02ADVL	Tax	($83.77)	$0.00	($83.77)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$212.93
LOR, KONG MENG	LOR, KONG MENG	LOR, YOU VANG	1015 HEARTH LN SW		CONCORD, NC 28025	Proration	0069615882	TPD2313	PENDING	277776684	Refund Generated due to proration on Bill #0069615882-2022-2022-0000-00	Vehicle Sold	05/02/2023	C ADVL	Tax	($107.30)	$0.00	($107.30)
														CI02ADVL	Tax	($69.60)	$0.00	($69.60)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$176.90
MARTIN, JASON TODD	MARTIN, JASON TODD	MARTIN, STEFANIE ANNE	10435 FALLING LEAF DR NW		CONCORD, NC 28027	Adjustment >= $100	0069916072	JLB6315	PENDING	278349201	Refund Generated due to adjustment on Bill #	Over Assessment	05/09/2023	C ADVL	Tax	($93.95)	$0.00	($93.95)
														CI02ADVL	Tax	($60.95)	$0.00	($60.95)

North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 6/2/2023 8:58:54 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
		ANNE	DR NW								#0069916072-2022-2022-0000-00			CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$154.90
MCATEER, SHANNON DAVID	MCATEER, SHANNON DAVID		2651 BEDFORD PL NW		CONCORD, NC 28027	Proration	0060196994	CM94952	PENDING	278029554	Refund Generated due to proration on Bill #0060196994-2022-2022-0000-00	Vehicle Sold	05/04/2023	C ADVL	Tax	($411.56)	$0.00	($411.56)
														CI02ADVL	Tax	($266.95)	$0.00	($266.95)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$678.51
MCCARTHY, COURTNEY ARYN	MCCARTHY, COURTNEY ARYN		9662 ESTRIDGE LN		CONCORD, NC 28027	Proration	0069834842	HLP2074	PENDING	278624676	Refund Generated due to proration on Bill #0069834842-2021-2021-0000-00	Vehicle Sold	05/12/2023	C ADVL	Tax	($69.36)	($3.98)	($73.34)
														CI04ADVL	Tax	($59.05)	($3.40)	($62.45)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$135.79
MCLAIN, PHILLIP EUGENE	MCLAIN, PHILLIP EUGENE		950 GILLING CT		KANNAPOLIS, NC 28081	Proration	0022746077	HMR4310	PENDING	278124072	Refund Generated due to proration on Bill #0022746077-2022-2022-0000-00	Vehicle Sold	05/05/2023	C ADVL	Tax	($44.50)	$0.00	($44.50)
														CI04ADVL	Tax	($37.89)	$0.00	($37.89)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$82.39
MILLER, DARREN ROGER	MILLER, DARREN ROGER		703 IRENE AVE		KANNAPOLIS, NC 28083	Proration	0070895588	JHE8501	PENDING	279352557	Refund Generated due to proration on Bill #0070895588-2022-2022-0000-00	Insurance Lapse	05/22/2023	C ADVL	Tax	($105.27)	$0.00	($105.27)
														CI04ADVL	Tax	($89.62)	$0.00	($89.62)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$194.89
MORGAN, MICHAEL ANDERSON	MORGAN, MICHAEL ANDERSON		5721 CLAW CT		CONCORD, NC 28025	Proration	0068715079	KCP4042	PENDING	185478382	Refund Generated due to proration on Bill #0068715079-2022-	Vehicle Sold	05/08/2023	C ADVL	Tax	($81.83)	$0.00	($81.83)
														FR08ADVL	Tax	($9.73)	$0.00	($9.73)
																	Refund	$91.56
MOYE, SEKEITHIA VONNAYE	MOYE, SEKEITHIA VONNAYE		3255 HAWKSBILL ST SW		CONCORD, NC 28027	Proration	0058006022	PKV8754	PENDING	279368352	Refund Generated due to proration on Bill #0058006022-2022-2022-0000-00	Vehicle Sold	05/23/2023	C ADVL	Tax	($152.72)	$0.00	($152.72)
														CI02ADVL	Tax	($99.06)	$0.00	($99.06)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$251.78
MULLIS, HAROLD GLENN JR	MULLIS, HAROLD GLENN JR		5239 FIELDSTONE DR		CONCORD, NC 28025	Proration	0000815465	YYF7464	PENDING	185352988	Refund Generated due to proration on Bill #0000815465-2021-	Vehicle Totalled	05/04/2023	C ADVL	Tax	($6.31)	$0.00	($6.31)
														FR04ADVL	Tax	($0.64)	$0.00	($0.64)
																	Refund	$6.95
MURRAY, RONALD WAYNE	MURRAY, RONALD WAYNE	MURRAY, MINNIE CARPENTER	3805 VANDERBURG DR		CONCORD, NC 28025	Proration	0014296205	HME6805	PENDING	186245572	Refund Generated due to proration on Bill #0014296205-2022-	Vehicle Sold	05/23/2023	C ADVL	Tax	($151.91)	$0.00	($151.91)
														FR04ADVL	Tax	($18.47)	$0.00	($18.47)
																	Refund	$170.38
NEARHOOD, KATHLEEN LOUISE	NEARHOOD, KATHLEEN LOUISE		263 SOUTHCIRCLE DR NW		CONCORD, NC 28027	Proration	0071525957	TMY4192	PENDING	279506337	Refund Generated due to proration on Bill #0071525957-2022-2022-0000-00	Vehicle Sold	05/24/2023	C ADVL	Tax	($15.12)	$0.00	($15.12)
														CI02ADVL	Tax	($9.81)	$0.00	($9.81)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$24.93
NIXON, MARTHA SALES	NIXON, DONALD WAYNE	NIXON, MARTHA SALES	4431 CODDLE CREEK DR		CONCORD, NC 28027	Proration	0014316519	TFD8301	PENDING	278124396	Refund Generated due to proration on Bill #0014316519-2022-2022-0000-00	Processed in error	05/05/2023	C ADVL	Tax	($49.51)	$0.00	($49.51)
														CI02ADVL	Tax	($32.11)	$0.00	($32.11)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$111.62
NOLAN, TIMOTHY MICHAEL	NOLAN, TIMOTHY MICHAEL		10621 CORONET CT		HARRISBURG, NC 28075	Proration	0069157370	FCN9539	PENDING	185631234	Refund Generated due to proration on Bill #0069157370-2022-	Vehicle Sold	05/10/2023	C ADVL	Tax	($114.83)	$0.00	($114.83)
														CI01ADVL	Tax	($67.50)	$0.00	($67.50)
																	Refund	$182.33
NOLAN, TIMOTHY MICHAEL	NOLAN, TIMOTHY MICHAEL		10621 CORONET CT		HARRISBURG, NC 28075	Proration	0010577929	F0CUST	PENDING	186044906	Refund Generated due to proration on Bill #0010577929-2022-	Vehicle Sold	05/18/2023	C ADVL	Tax	($70.74)	$0.00	($70.74)
														CI01ADVL	Tax	($41.59)	$0.00	($41.59)
																	Refund	$112.33
NUTHAKKI, MURALI KRISHNA	NUTHAKKI, MURALI KRISHNA		1357 REGIONS BLVD		FORT MILL, SC 29707	Proration	0061276681	DKF6733	PENDING	280070613	Refund Generated due to proration on Bill #0061276681-2021-2021-0000-00	Reg . Out of state	05/30/2023	C ADVL	Tax	($164.44)	$0.00	($164.44)
														CI02ADVL	Tax	($106.66)	$0.00	($106.66)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$271.10
OSBORNE, STEVEN RYAN	OSBORNE, STEVEN RYAN		735 WINGARD RD		CONCORD, NC 28025	Proration	0070936814	KFL1253	PENDING	185478304	Refund Generated due to proration on Bill #0070936814-2022-	Vehicle Sold	05/08/2023	C ADVL	Tax	($27.90)	$0.00	($27.90)
														FR16ADVL	Tax	($4.45)	$0.00	($4.45)
																	Refund	$32.35
PARKER, CHRISTOPHE R JAMES	PARKER, CHRISTOPHE R JAMES		406 WILLIAMS RD		HARRISBURG, NC 28075	Proration	0040803628	JLC6034	PENDING	186234952	Refund Generated due to proration on Bill #0040803628-2022-	Vehicle Sold	05/22/2023	C ADVL	Tax	($70.82)	$0.00	($70.82)
														CI01ADVL	Tax	($41.63)	$0.00	($41.63)
																	Refund	$112.45
PATEL, MAHESHCHAN DRA RANCHHODJI	PATEL, MAHESHCHAN DRA RANCHHODJI	PATEL, ANANTABEN MAHESH CHANDRA	2294 LAURENS DR		CONCORD, NC 28027	Proration	0047217861	FDZ5463	PENDING	278534796	Refund Generated due to proration on Bill #0047217861-2021-2021-0000-00	Vehicle Totalled	05/11/2023	C ADVL	Tax	($18.22)	$0.00	($18.22)
														CI04ADVL	Tax	($15.51)	$0.00	($15.51)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$33.73
PATTERSON, PAULA JARNIE	PATTERSON, PAULA JARNIE		6069 STARNES DR		HARRISBURG, NC 28075	Proration	0061632308	NAYS	PENDING	185749752	Refund Generated due to proration on Bill #0061632308-2021-	Vehicle Sold	05/12/2023	C ADVL	Tax	($23.67)	$0.00	($23.67)
														CI01ADVL	Tax	($11.35)	$0.00	($11.35)
																	Refund	$35.02
PAVKOV,	PAVKOV,		1389		CONCORD,	Proration	0066891645	HJD4323	PENDING	278534976	Refund Generated due	Vehicle Sold	05/11/2023	C ADVL	Tax	($160.60)	$0.00	($160.60)

North Carolina Vehicle Tax System

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Report Date 6/2/2023 8:58:54 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
ROCKY LEE	ROCKY LEE		OVERLEA PL NW		NC 28027						to proration on Bill #0066891645-2021-2021-0000-00			CI02ADVL	Tax	($104.18)	$0.00	($104.18)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$264.78
POLK, JADEN MALEIK	POLK, JADEN MALEIK		112 ROBBINS ST SW		CONCORD, NC 28025	Proration	0061566991	JER2797	PENDING	280070883	Refund Generated due to proration on Bill #0061566991-2021-2021-0000-00	Vehicle Totalled	05/30/2023	C ADVL	Tax	($52.44)	$0.00	($52.44)
														CI02ADVL	Tax	($34.02)	$0.00	($34.02)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$86.46
RABORN, RYAN COLTON	RABORN, RYAN COLTON		5705 ROCKY RIVER RD		CONCORD, NC 28025	Proration	0070257092	YZ5390	PENDING	185973948	Refund Generated due to proration on Bill #0070257092-2022-	Vehicle Sold	05/17/2023	C ADVL	Tax	($20.13)	$0.00	($20.13)
														FR02ADVL	Tax	($3.81)	$0.00	($3.81)
																	Refund	$23.94
RAMIA, ANDRES GUSTAVO	RAMIA, ANDRES GUSTAVO		10038 CAROUSEL CORRAL DR		MIDLAND, NC 28107	Proration	0061633211	JHM3712	PENDING	186498240	Refund Generated due to proration on Bill #0061633211-2021-	Vehicle Sold	05/26/2023	C ADVL	Tax	($291.68)	$0.00	($291.68)
														FR14ADVL	Tax	($27.59)	$0.00	($27.59)
																	Refund	$319.27
REDMOND, DAVID STEPHEN	REDMOND, DAVID STEPHEN		947 LITTLETON DR	LITTLETON DR	CONCORD, NC 28025	Proration	0068930681	FCL1827	PENDING	279352053	Refund Generated due to proration on Bill #0068930681-2022-2022-0000-00	Vehicle Sold	05/22/2023	C ADVL	Tax	($31.60)	$0.00	($31.60)
														CI02ADVL	Tax	($20.49)	$0.00	($20.49)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$52.09
ROLLINS-GRANT, TIFFANIE	ROLLINS-GRANT, TIFFANIE		5424 APPLE GLEN DR		HARRISBURG, NC 28075	Proration	0066216340	ZXF1569	PENDING	186112036	Refund Generated due to proration on Bill #0066216340-2021-	Vehicle Totalled	05/19/2023	C ADVL	Tax	($62.70)	$0.00	($62.70)
														CI01ADVL	Tax	($30.08)	$0.00	($30.08)
																	Refund	$92.78
ROYSTER, RONALD LEONARD	ROYSTER, RONALD LEONARD	ROYSTER, JATANA FULK	8227 LAUREL OAK CT		HARRISBURG, NC 28075	Proration	0039729712	A3528	PENDING	186337496	Refund Generated due to proration on Bill #0039729712-2022-	Vehicle Sold	05/24/2023	C ADVL	Tax	($96.57)	$0.00	($96.57)
														FR07ADVL	Tax	($19.57)	$0.00	($19.57)
																	Refund	$116.14
SADLER, EDWARD LEE	SADLER, EDWARD LEE		6901 PALAFOX DR		CONCORD, NC 28025	Proration	0045947710	FAS1292	PENDING	185894126	Refund Generated due to proration on Bill #0045947710-2022-	Vehicle Totalled	05/15/2023	C ADVL	Tax	($98.71)	$0.00	($98.71)
														FR14ADVL	Tax	($13.34)	$0.00	($13.34)
																	Refund	$112.05
SANTIAGO, SHAKIAR BROWN	SANTIAGO, SHAKIAR BROWN		2509 OLD PLANK RD		KANNAPOLIS, NC 28083	Proration	0060196766	JCM4921	PENDING	278217969	Refund Generated due to proration on Bill #0060196766-2021-2021-0000-00	Vehicle Sold	05/08/2023	C ADVL	Tax	($7.20)	$0.00	($7.20)
														CI02ADVL	Tax	($4.67)	$0.00	($4.67)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$11.87
SEEPANA, NAVIN TEZ	SEEPANA, NAVIN TEZ		2654 RED MAPLE LN		HARRISBURG, NC 28075	Proration	0065554843	RBS9021	PENDING	186713782	Refund Generated due to proration on Bill #0065554843-2022-	Vehicle Sold	05/30/2023	C ADVL	Tax	($245.87)	$0.00	($245.87)
														CI01ADVL	Tax	($144.52)	$0.00	($144.52)
																	Refund	$390.39
SENGOTTAIYAN, BOOBATHI RAJAN	SENGOTTAIYAN, BOOBATHI RAJAN		1276 TRANQUILITY POINT AV		CONCORD, NC 28027	Proration	0067973019	REF9814	PENDING	279506253	Refund Generated due to proration on Bill #0067973019-2022-2022-0000-00	Vehicle Totalled	05/24/2023	C ADVL	Tax	($34.74)	$0.00	($34.74)
														CI02ADVL	Tax	($22.53)	$0.00	($22.53)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$57.27
SEXTON, ADRIAN AARON	SEXTON, ADRIAN AARON		3411 BRICKWOOD CIR		MIDLAND, NC 28107	Proration	0028715354	DLS3293	PENDING	185159166	Refund Generated due to proration on Bill #0028715354-2022-	Vehicle Sold	05/01/2023	C ADVL	Tax	($11.62)	$0.00	($11.62)
														CI06ADVL	Tax	($3.45)	$0.00	($3.45)
																	Refund	$15.07
SEXTON, ADRIAN AARON	SEXTON, ADRIAN AARON		3411 BRICKWOOD CIR		MIDLAND, NC 28107	Proration	0000786581	TDH8681	PENDING	186045106	Refund Generated due to proration on Bill #0000786581-2022-	Vehicle Sold	05/18/2023	C ADVL	Tax	($9.57)	$0.00	($9.57)
														CI06ADVL	Tax	($2.85)	$0.00	($2.85)
																	Refund	$12.42
SEYMOUR, LORI JEAN	SEYMOUR, LORI JEAN		8562 OLDENBURG DR		MOUNT PLEASANT, NC 28124	Adjustment < $100	0072118841	94007	PENDING	186234742	Refund Generated due to adjustment on Bill #0072118841-2022-	Adjustment	05/22/2023	C ADVL	Tax	($2.22)	$0.00	($2.22)
														CI03ADVL	Tax	($1.51)	$0.00	($1.51)
																	Refund	$3.73
SHERMAN, DONALD HOWARD	SHERMAN, DONALD HOWARD		1018 TWIN OAKS CT		CONCORD, NC 28027	Proration	0065619781	DHX5869	PENDING	185631254	Refund Generated due to proration on Bill #0065619781-2021-	Vehicle Totalled	05/10/2023	C ADVL	Tax	($56.66)	$0.00	($56.66)
														FR02ADVL	Tax	($10.72)	$0.00	($10.72)
																	Refund	$67.38
SIEGEL, SCOTT CLAYTON	SIEGEL, SCOTT CLAYTON		2036 TOPAZ PLAZA		DAVIDSON, NC 28036	Proration	0068624282	CL97207	PENDING	277920294	Refund Generated due to proration on Bill #0068624282-2022-2022-0000-00	Vehicle Totalled	05/03/2023	C ADVL	Tax	($179.79)	$0.00	($179.79)
														CI04ADVL	Tax	($153.07)	$0.00	($153.07)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$332.86
SIMS, ROBERT ANTHONY	SIMS, ROBERT ANTHONY		1912 IVY HOLLOW PL		CONCORD, NC 28027	Proration	0070594385	8V1566	PENDING	278348442	Refund Generated due to proration on Bill #0070594385-2022-2022-0000-00	Vehicle Sold	05/09/2023	C ADVL	Tax	($48.40)	$0.00	($48.40)
														CI04ADVL	Tax	($41.20)	$0.00	($41.20)
														CI04ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$89.60
SMITH, ALEX DAVID	SMITH, ALEX DAVID		3885 HOUNSLOW LN		HARRISBURG, NC 28075	Proration	0022728352	HMK4184	PENDING	185749854	Refund Generated due to proration on Bill #0022728352-2022-	Vehicle Totalled	05/12/2023	C ADVL	Tax	($34.33)	($1.72)	($36.05)
														CI01ADVL	Tax	($20.19)	($1.01)	($21.20)
																	Refund	$57.25
SMITH, DYMON SANAA	SMITH, DYMON SANAA		428 ITHACA DR		CONCORD, NC 28025	Proration	0061217473	HLE9185	PENDING	185902550	Refund Generated due to proration on Bill #0061217473-2021-	Vehicle Sold	05/16/2023	C ADVL	Tax	($18.92)	$0.00	($18.92)
														FR04ADVL	Tax	($1.92)	$0.00	($1.92)
																	Refund	$20.84

North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 6/2/2023 8:58:54 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
SMITH, MICHEAL WAYNE JR	SMITH, MICHEAL WAYNE JR		1914 SHANNON RD		WAXHAW, NC 28173	Adjustment < $100	0070871122	JMF3639	PENDING	370832300	Refund Generated due to adjustment on Bill #0070871122-2022-2022-0000	Situs error	05/05/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($26.11)	$0.00	($26.11)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR14ADVL	Tax	$5.44	$0.00	$5.44
																	Refund	$50.67
SMITH, MICHELLE RICE	SMITH, MICHELLE RICE		1914 SHANNON RD		WAXHAW, NC 28173	Adjustment < $100	0070661783	PLD4263	PENDING	370832140	Refund Generated due to adjustment on Bill #0070661783-2022-2022-0000	Situs error	05/05/2023	C ADVL	Tax	$0.00	($0.01)	($0.01)
														CI02ADVL	Tax	($33.17)	($1.66)	($34.83)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR14ADVL	Tax	$6.91	$0.35	$7.26
																	Refund	$57.58
SMITH, MICHELLE RICE	SMITH, MICHELLE RICE		1914 SHANNON RD		WAXHAW, NC 28173	Adjustment < $100	0071462842	PEV6299	PENDING	370832296	Refund Generated due to adjustment on Bill #0071462842-2022-2022-0000	Situs error	05/05/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($8.35)	$0.00	($8.35)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR14ADVL	Tax	$1.74	$0.00	$1.74
																	Refund	$36.61
STANCIL PAINTING & SERVICES INC	STANCIL PAINTING & SERVICES INC		4909 STOUGH RD SW		CONCORD, NC 28027	Proration	0044923481	HE6265	PENDING	185894066	Refund Generated due to proration on Bill #0044923481-2022-	Vehicle Sold	05/15/2023	C ADVL	Tax	($48.04)	$0.00	($48.04)
														FR02ADVL	Tax	($9.09)	$0.00	($9.09)
																	Refund	$57.13
STANCIL, LISA HOLLAWAY	STANCIL, LISA HOLLAWAY		PO BOX 183		LOCUST, NC 28097	Proration	0060454933	TCW4841	PENDING	185416086	Refund Generated due to proration on Bill #0060454933-2021-	Vehicle Sold	05/05/2023	C ADVL	Tax	($1.97)	$0.00	($1.97)
														FR13ADVL	Tax	($0.25)	$0.00	($0.25)
																	Refund	$2.22
STIDEM, TERRY LEE	STIDEM, TERRY LEE		212 NC HWY 24-27 E		MIDLAND, NC 28107	Proration	0069085390	TDW8853	PENDING	278624973	Refund Generated due to proration on Bill #0069085390-2021-2021-0000-00	Vehicle Sold	05/12/2023	C ADVL	Tax	($3.68)	($0.18)	($3.86)
														CI02ADVL	Tax	($2.38)	($0.12)	($2.50)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$6.36
STITH, JAMES RAY	STITH, JAMES RAY		208 SHIMFESSEL CT		CYNTHIANA, KY 41031	Proration	0063664581	JKA6932	PENDING	185353032	Refund Generated due to proration on Bill #0063664581-2022-	Reg . Out of state	05/04/2023	C ADVL	Tax	($58.96)	$0.00	($58.96)
														FR08ADVL	Tax	($7.01)	$0.00	($7.01)
																	Refund	$65.97
SWINSON, TAMSBY FREEMAN	SWINSON, TAMSBY FREEMAN		616 TAYLOR CT NW		CONCORD, NC 28027	Proration	0051549323	TBR8711	PENDING	278853402	Refund Generated due to proration on Bill #0051549323-2022-2022-0000-00	Reg . Out of state	05/16/2023	C ADVL	Tax	($33.94)	$0.00	($33.94)
														CI02ADVL	Tax	($22.01)	$0.00	($22.01)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$55.95
TALBERT, JENNIFER BALLARD	TALBERT, JENNIFER BALLARD	TALBERT, JOHN SAMUEL	5211 DRIFTWOOD DR		DAVIDSON, NC 28036	Proration	0061200876	CBE4637	PENDING	185415958	Refund Generated due to proration on Bill #0061200876-2021-	Vehicle Sold	05/05/2023	C ADVL	Tax	($115.94)	$0.00	($115.94)
														FR11ADVL	Tax	($10.65)	$0.00	($10.65)
																	Refund	$126.59
TALBERT, JENNIFER BALLARD	TALBERT, JENNIFER BALLARD	TALBERT, JOHN SAMUEL	5211 DRIFTWOOD DR		DAVIDSON, NC 28036	Proration	0068242534	JAR1772	PENDING	185415952	Refund Generated due to proration on Bill #0068242534-2022-	Vehicle Sold	05/05/2023	C ADVL	Tax	($152.59)	$0.00	($152.59)
														FR11ADVL	Tax	($14.02)	$0.00	($14.02)
																	Refund	$166.61
TAREEN LOGISTICS LLC	TAREEN LOGISTICS LLC		230 EAST WT HARRIS BLVD	SUITE C6	CHARLOTTE, NC 28262	Proration	0071399353	TMW8475	PENDING	186245666	Refund Generated due to proration on Bill #0071399353-2022-	Vehicle Sold	05/23/2023	C ADVL	Tax	($242.10)	$0.00	($242.10)
														CI01ADVL	Tax	($142.31)	$0.00	($142.31)
																	Refund	$384.41
THANGAVEL, HARIDAS	THANGAVEL, HARIDAS		8963 HAPPINESS RD		HARRISBURG, NC 28075	Proration	0048937391	DJK6804	PENDING	185631372	Refund Generated due to proration on Bill #0048937391-2021-	Vehicle Sold	05/10/2023	C ADVL	Tax	($8.88)	$0.00	($8.88)
														CI01ADVL	Tax	($4.26)	$0.00	($4.26)
																	Refund	$13.14
THE CRUTCHFIELD GROUP	THE CRUTCHFIELD GROUP		PO BOX 1349		CONCORD, NC 28026	Adjustment >= $100	0071765881	JV1419	PENDING	370705900	Refund Generated due to adjustment on Bill #0071765881-2021-2021-0000	Situs error	05/04/2023	C ADVL	Tax	$0.00	($0.01)	($0.01)
														CI02ADVL	Tax	($748.83)	($65.52)	($814.35)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR05ADVL	Tax	$156.01	$13.65	$169.66
																	Refund	$674.70
THE CRUTCHFIELD GROUP LTD	THE CRUTCHFIELD GROUP LTD		PO BOX 1349		CONCORD, NC 28026	Adjustment >= $100	0071766001	NW1832	PENDING	370705892	Refund Generated due to adjustment on Bill #0071766001-2022-2022-0000	Situs error	05/04/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($820.90)	($41.04)	($861.94)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR05ADVL	Tax	$171.02	$8.55	$179.57
																	Refund	$712.37
THE CRUTCHFIELD GROUP LTD	THE CRUTCHFIELD GROUP LTD		PO BOX 1349		CONCORD, NC 28026	Adjustment >= $100	0071774568	BY6898	PENDING	370705896	Refund Generated due to adjustment on Bill #0071774568-2022-2022-0000	Situs error	05/04/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($88.56)	$0.00	($88.56)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR05ADVL	Tax	$18.45	$0.00	$18.45
																	Refund	$100.11
VELEZ LOPEZ, PABLO	VELEZ LOPEZ, PABLO		598 UNION CEMETERY RD SW		CONCORD, NC 28027	Proration	0070546905	KFL4141	PENDING	278853645	Refund Generated due to proration on Bill #0070546905-2022-2022-0000-00	Vehicle Totalled	05/16/2023	C ADVL	Tax	($149.29)	($7.46)	($156.75)
														CI02ADVL	Tax	($96.84)	($4.85)	($101.69)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$258.44

North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 6/2/2023 8:58:54 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
VINE, JOSEPH AARON	VINE, JOSEPH AARON	VINE, CHRYSTAL JAYLENE	1077 RIVER HAVEN AVE SW		CONCORD, NC 28025	Adjustment >= $100	0062117158	3454SF	PENDING	279368271	Refund Generated due to adjustment on Bill #0062117158-2021-2021-0000-00	Military	05/23/2023	C ADVL	Tax	($104.34)	$0.00	($104.34)
														CI02ADVL	Tax	($67.68)	$0.00	($67.68)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$202.02
VINE, JOSEPH AARON	VINE, JOSEPH AARON	VINE, CHRYSTAL JAYLENE	1077 RIVER HAVEN AVE SW		CONCORD, NC 28025	Adjustment >= $100	0062117251	6673SB	PENDING	279368265	Refund Generated due to adjustment on Bill #0062117251-2021-2021-0000-00	Military	05/23/2023	C ADVL	Tax	($91.91)	$0.00	($91.91)
														CI02ADVL	Tax	($59.62)	$0.00	($59.62)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$181.53
VINE, JOSEPH AARON	VINE, JOSEPH AARON	VINE, CHRYSTAL JAYLENE	1077 RIVER HAVEN AVE SW		CONCORD, NC 28025	Adjustment >= $100	0065803073	3454SF	PENDING	279368280	Refund Generated due to adjustment on Bill #0065803073-2021-2021-0000-00	Military	05/23/2023	C ADVL	Tax	($89.39)	$0.00	($89.39)
														CI02ADVL	Tax	($57.98)	$0.00	($57.98)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$177.37
VINE, JOSEPH AARON	VINE, JOSEPH AARON	VINE, CHRYSTAL JAYLENE	1077 RIVER HAVEN AVE SW		CONCORD, NC 28025	Adjustment >= $100	0065803074	6673SB	PENDING	280070769	Refund Generated due to adjustment on Bill #0065803074-2021-2021-0000-00	Military	05/30/2023	C ADVL	Tax	($80.73)	$0.00	($80.73)
														CI02ADVL	Tax	($52.37)	$0.00	($52.37)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
																	Refund	$163.10
VONCANNON, BRYAN ANTHONY	VONCANNON, BRYAN ANTHONY		214 FLINT RIDGE DR		CONCORD, NC 28025	Proration	0034242284	DLF5897	PENDING	185894388	Refund Generated due to proration on Bill #0034242284-2022-	Vehicle Sold	05/15/2023	C ADVL	Tax	($7.12)	$0.00	($7.12)
														FR04ADVL	Tax	($0.87)	$0.00	($0.87)
																	Refund	$7.99
WALTER, CHARLES RAY JR	WALTER, CHARLES RAY JR		4322 ST STEPHENS CHURCH R		GOLD HILL, NC 28071	Adjustment < $100	0072202260	HKE6301	PENDING	371947356	Refund Generated due to adjustment on Bill #0072202260-2022-2022-0000	Situs error	05/17/2023	C ADVL	Tax	$0.00	$0.00	$0.00
														CI02ADVL	Tax	($45.70)	$0.00	($45.70)
														CI02ADVL	Vehicle Fee	($30.00)	$0.00	($30.00)
														FR15ADVL	Tax	$12.09	$0.00	$12.09
																	Refund	$63.61
WEIMER, MEGAN KATHLEEN	WEIMER, MEGAN KATHLEEN		9745 WALTHAM CT		CHARLOTTE, NC 28269	Proration	0071077310	KFL1273	PENDING	277920159	Refund Generated due to proration on Bill #0071077310-2022-2022-0000-00	Vehicle Sold	05/03/2023	C ADVL	Tax	($19.74)	$0.00	($19.74)
														CI02ADVL	Tax	($12.81)	$0.00	($12.81)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$32.55
WILCOX, KATHLEEN ANN	WILCOX, KATHLEEN ANN		4833 HEIDEN DR		CHARLOTTE, NC 28227	Proration	0069012111	KCK1536	PENDING	185749870	Refund Generated due to proration on Bill #0069012111-2022-	Incomplete Doc	05/12/2023	C ADVL	Tax	($69.44)	$0.00	($69.44)
														FR07ADVL	Tax	($14.07)	$0.00	($14.07)
																	Refund	$83.51
WILDER, KIMBERLY BARNHARDT	WILDER, KIMBERLY BARNHARDT		1774 BELMONT CIR SW		VERO BEACH, FL 32968	Proration	0048846995	FJN1611	PENDING	185159180	Refund Generated due to proration on Bill #0048846995-2022-	Vehicle Sold	05/01/2023	C ADVL	Tax	($4.99)	$0.00	($4.99)
														FR03ADVL	Tax	($0.54)	$0.00	($0.54)
																	Refund	$5.53
WILDER, KIMBERLY BARNHARDT	WILDER, KIMBERLY BARNHARDT		1774 BELMONT CIR SW		VERO BEACH, FL 32968	Proration	0029235541	DME3683	PENDING	185159170	Refund Generated due to proration on Bill #0029235541-2022-	Vehicle Sold	05/01/2023	C ADVL	Tax	($39.61)	$0.00	($39.61)
														FR03ADVL	Tax	($4.28)	$0.00	($4.28)
																	Refund	$43.89
WILLIAMS, MARK DAVID	WILLIAMS, MARK DAVID		7401 DOVER MILL DR SW		CONCORD, NC 28025	Proration	0058202196	JINIST	PENDING	278841066	Refund Generated due to proration on Bill #0058202196-2022-2022-0000-00	Vehicle Sold	05/15/2023	C ADVL	Tax	($18.56)	$0.00	($18.56)
														CI02ADVL	Tax	($12.04)	$0.00	($12.04)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$30.60
WOODY, MICHAEL NELSON	WOODY, MICHAEL NELSON		6101 FIRETHORNE LN		CONCORD, NC 28025	Proration	0070077491	KEN1295	PENDING	185631666	Refund Generated due to proration on Bill #0070077491-2022-	Vehicle Sold	05/10/2023	C ADVL	Tax	($168.23)	($9.68)	($177.91)
														FR04ADVL	Tax	($20.46)	($1.17)	($21.63)
																	Refund	$199.54
YEARY, CHRISTOPHER GLEN	YEARY, CHRISTOPHER GLEN		4573 LANSTONE CT SW		CONCORD, NC 28027	Proration	0069498944	KDM5579	PENDING	279352317	Refund Generated due to proration on Bill #0069498944-2022-2022-0000-00	Vehicle Sold	05/22/2023	C ADVL	Tax	($160.69)	$0.00	($160.69)
														CI02ADVL	Tax	($104.23)	$0.00	($104.23)
														CI02ADVL	Vehicle Fee	$0.00	$0.00	$0.00
																	Refund	$264.92
																	Refund Total	$17901.92

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
New Business

SUBJECT:
JCPC – Funding Appeal

BRIEF SUMMARY:
The JCPC board's funding decisions on April 19, 2023, regarding the aforementioned funding comparison of the Youth Development Initiatives (YDI) and TYM vocational programs does not reflect fairness, sound reasoning, and appears arbitrary in consideration of the four (4) minimum areas the JCPC Bylaws list as key points that should be used when scrutinizing programs during funding deliberations.

REQUESTED ACTION:
It is requested that you move to have the JCPC board allocate the $51,000 in FY 2023-24 to the YDI vocational program received in the current FY 2022-23 as a starting point, and then cut all of the currently funded programs equally and/or with reasonable/rational discretion to address pertinent service needs or to fund a new program(s).

EXPECTED LENGTH OF PRESENTATION:
10 Minutes

SUBMITTED BY:
Darryl Bego, Executive Director of Youth Development Initiatives

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Appeal Documentation
- Recommendation Letter

Board of County Commissioners (BOCC):

My name is Darryl Bego. I am the Executive Director of Youth Development Initiatives (YDI) and the Program Manager of the YDI Vocational and Career Development Academy-Cabarrus, which is funded by the Cabarrus County Juvenile Crime Prevention Council (JCPC).

I am writing to make an appeal to the BOCC regarding my questions and concerns surrounding the funding decisions by the Cabarrus County JCPC on April 19, 2023. Neither the JCPC board or the County Manager remotely responded to nor addressed my questions and concerns during my appeals to them; therefore, I am turning to you as the third level of the JCPC Appeal Process, which is located on page six of the Cabarrus JCPC Bylaws. ***This letter includes the context, premise, and support documentation for my appeal***.

The context of my appeal is this: At the Wednesday, 4/19/23, Cabarrus JCPC Funding Meeting, the board approved a funding plan that cut YDI's funding for FY 2023-24 for its Vocation and Career Development program by $29,607. In contrast, the board raised the funding of another vocational program (TYM-Get Hired) by $14,425. Together, that is a $44,032 funding differential between the two similar vocational programs.

The premise of my appeal is as follows:
The JCPC board's funding decisions on April 19, 2023, regarding the aforementioned funding comparison of the YDI and TYM vocational programs does not reflect fairness, sound reasoning, and appears arbitrary in consideration of the four (4) minimum areas the JCPC Bylaws list as key points that should be used when scrutinizing programs during funding deliberations. The JCPC Bylaws state: "***Proposed grants will be scrutinized according to … EFFECTIVENESS, STAFFING, AMOUNT REQUESTED, AND EXPECTATION at minimum*** (see Graphic A).".

Graphic A

Article VI: FUNDING PROCEDURES

Section 1. Screening of Programs:

1.1 All proposed grants submitted to the JCPC will be screened by the Allocations Committee or JCPC.

1.2 In order to be considered for funding, proposals must be submitted by the advertised deadline.

1.3 Proposed grants will be scrutinized according to whether they are 501(c) 3 or public non-profit organizations in good standing with the federal, state, and local government, and as to whether or not they meet the needs as indicated in the request for proposal, as well as, effectiveness, staffing, amount requested, and expectations at minimum. Other considerations, such as fiscal stability, past performance, program accountability, etc. may also enter into funding deliberations.

Therefore, given the context and premise of my appeal, I simply am asking the BOCC to determine if the JCPC Board's actions and subsequent FY 2023-24 funding decisions on Wednesday, April 19, 2023, reflected the following:

1. **Proof of conscientious and reasonable use of the readily available information provided them during the funding process** (namely the JCPC Funding Allocation Worksheet, Area Consultant's Talking Points, and the funding presentations given by programs) **to render a fair and rational funding decision as reflected in the funding differentiation between YDI's and TYM's vocational programs relative to what the bylaws call minimum points of scrutiny that should be used when making funding decisions**.

2. **An explanation that shows clear reasoning and attentiveness to the fair and reasonable use/application of the information used during the funding process points pertaining to the funding differential between the YDI and TYM vocational programs relative to what the bylaws call minimum points of scrutiny that should be used when making funding decisions**.

If not, then my humble request is that you move to have the JCPC board allocate the $51,000 in FY 2023-24 to the YDI vocational program received in the current FY 2022-23 as a starting point, and then cut all of the currently funded programs equally and/or with reasonable/rational discretion to address pertinent service needs or to fund a new program(s).

The substantive and supporting documentation of my appeal detailing how the arbitrary funding decision and subsequent funding differentiation between the YDI vocational and TYM-Get Hired programs reflect a disregard by the board to follow data/facts readily available during funding deliberations to ensure fairness and explainable reasoning were observed while scrutinizing the YDI and TYM vocational programs, resulting in denying YDI due and fair consideration when scrutinizing the merits of both programs against the minimum JCPC bylaw funding standards:

Standard I: Amount Requested

- **TYM-Get Hired** requested $59,840 to serve 20 juveniles = $2,992 per participant
- **YDI Vocational** requested $51,997 to serve 20 juveniles = $2,599 per participant

Facts (See Graphic B below)

- The YDI Vocational program's request is $7,843 *cheaper* than the TYM Get Hired's request to serve the same number of juveniles.
- The YDI Vocational program costs the JCPC $393 *less* per juvenile participant than the TYM Get Hired request while also including a trades (carpentry) component.

Question: Why was there no mention or consideration given during funding deliberations to the $7,843 funding request differentiation between the two programs to serve the same number of juvenile clients with similar services?

Graphic B

Cabarrus County Worksheet FY 2023-2024
JCPC Funding Allocation Worksheet

Available Funds: $ 459,927

	PROGRAM	Type of Service	JCPC Funding for FY 2021-22	Youth Served 2021-22 VS Est.	JCPC Funding for FY 2022-23	Youth Served To-date 2022-23 Vs Est.	Requested Amount for FY 2023-24	Est. Youth Served 2023-24
1	JCPC Administration	N/A	$15,500		$15,500		$15,500	
2	Aspire - Kids at Work / The Connection	Interpersonal Skills	$75,123	14/19	$62,367	20/16	$65,625	21
		Vocational Skills		5/18		4/12		8
3	TYM SHIFT Mentoring	Mentoring	$53,948	49/50	$54,500	37/40	$57,395	40
4	TYM - Get Hired	Vocational Skills	$37,000	28/15	$45,415	34/15	$59,840	20
5	TYM- Restitution & Community Service	Restitution / Community Service	$72,320	30/80	$68,490	35/80	$69,320	80
6	RCYSB Sex Offender Specific Evaluations and Treatment	Assessments	$15,171	2/5	$15,042	3/5	$8,167	4
		Treatment		0/3		0/3		
7	YDI Vocational and Career Development	Vocational Skills	$55,603	9/20	$51,000	21/20	$51,997	20

Standard II: Effectiveness

At the time of the funding presentations and during the funding deliberations, YDI provided video testimonials by juvenile participants at the Performance Learning Center (PLC) followed up by a letter of recommendation from the PLC's student support specialist, as well as post-program surveys by juvenile participants. The purpose was to provide the board with direct, first-hand accounts of how juvenile clients were impacted by the YDI vocational program. (YDI was the only program to offer such verifiable third-party, first-hand corroborations during funding presentations/deliberations.)

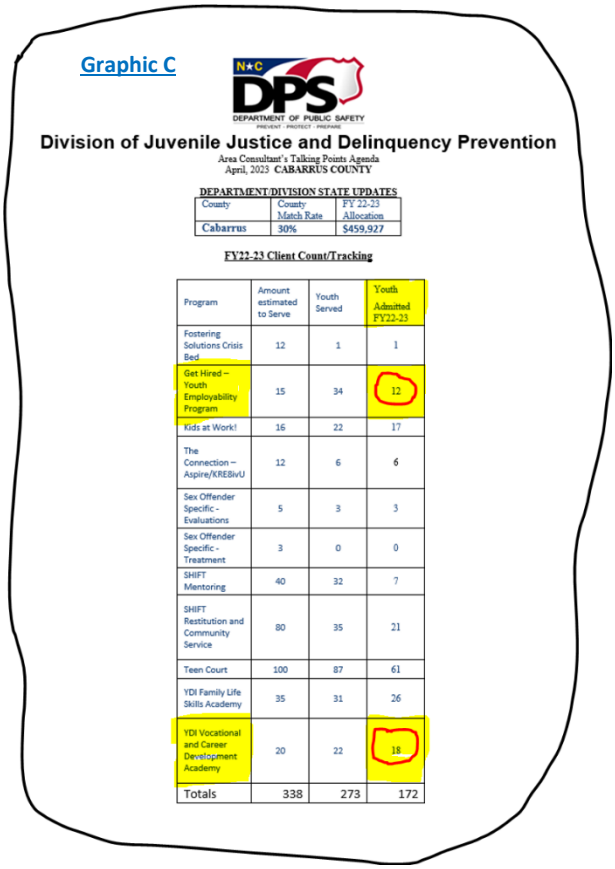
The Juvenile Justice Court Counselor supervisor mentioned at least five (5) times over the course of the funding allocation committee and the funding deliberation meetings how her court counselors consistently refer their juveniles to the YDI vocational program, how their juveniles and parents continually express their satisfaction and support for YDI's programs, and how YDI consistently communicates and interacts with her staff to provide timely updates and any other requested information.

Additionally, the strengths of the YDI vocational program as detailed in YDI's most recent monitoring report are "***its ability to provide juveniles with a comprehensive introduction to vocational avenues. In addition to learning marketable skills that include safety training and how to confidently apply for employment, youth learn that their future is attached to their present. An additional strength is the program's well-organized and thorough documentation***."

Finally, the DPS consultant stated "***YDI's programming is highly regarded by our members, DJJ and NCDPS***."

Question: What outcomes or measures of effectiveness by the TYM-Get Hired program stood out to the board to justify a $44,032 funding differential versus the YDI vocational program?

Graphic C



DEPARTMENT OF PUBLIC SAFETY

Division of Juvenile Justice and Delinquency Prevention

Area Consultant's Talking Points Agenda
April, 2023 **CABARRUS COUNTY**

DEPARTMENT/DIVISION STATE UPDATES

County	County Match Rate	FY 22-23 Allocation
Cabarrus	30%	$459,927

FY22-23 Client Count/Tracking

Program	Amount estimated to Serve	Youth Served	Youth Admitted FY22-23
Fostering Solutions Crisis Bed	12	1	1
Get Hired – Youth Employability Program	15	34	12
Kids at Work!	16	22	17
The Connection – Aspire/KREBIvU	12	6	6
Sex Offender Specific - Evaluations	5	3	3
Sex Offender Specific - Treatment	3	0	0
SHIFT Mentoring	40	32	7
SHIFT Restitution and Community Service	80	35	21
Teen Court	100	87	61
YDI Family Life Skills Academy	35	31	26
YDI Vocational and Career Development Academy	20	22	18
Totals	338	273	172

Standard III: Expectation

Both the YDI vocational and TYM Get-Hired programs have superseded the expected number of TOTAL juvenile clients to serve during FY 22-23.

However, according to the FY 22-23 Client Count/Tracking data (See Graphic C) from the DPS Consultant that was reviewed and discussed at the funding meeting, it clearly illustrates that the YDI vocational program has served six (6) more juvenile clients so far in the current fiscal year 2022-23 than the TYM-Get Hired program.

Facts

- **Eighteen (18) of the twenty-two (22) juvenile clients** the YDI Vocational program served this FY 2022-23 were admitted during the current FY 2022-23.
- **Only twelve (12) of the thirty-four (34) juvenile clients** the TYM-Get Hired program served this FY 2022-23 were admitted during the current FY 2022-23.

Question1: Why was there no consideration given to this?

Question2: Is it best practice to assume the quantity of clients served is absolutely equivalent to the quality of services rendered and therefore automatically qualified to receive preferential funding consideration?

Standard IV: Staffing

Research shows that staff retention is a vital factor in determining the degree of stability and continuity in the delivery of services commonly associated with higher productivity. Low turnover helps ensure a program's policies, procedures, and, most importantly, services are implemented with the highest fidelity.

According to research by Quantum Workplace, employee retention rates of 90% or higher are considered good, meaning a company should aim for an average employee turnover rate of 10% or less.

The YDI vocational program has had no staffing vacancies or shortages since becoming a JCPC service provider in Cabarrus County in FY 2019-20. In contrast, at the funding presentation meeting in March, the TYM organization stated it had a 90% turnover rate during the current fiscal year, which was identified during the monitoring process several months earlier. According to TYM representatives, the majority of those vacancies remained unfilled at the time of the funding presentations.

Question: Why was there no consideration/discussion given to this differentiation between the two organization's staffing statuses and how it may have impacted our respective capacities to deliver programming with fidelity and without disruption?

In conclusion, the board's decision to ignore readily available data and information at their disposal during the JCPC funding meeting on Wednesday, April 19, resulted in funding decisions that are arbitrary and trigger questions regarding rationality, reasonableness, and fairness, and violated the equal assessment of the minimum scrutiny standards surrounding the Funding/Program Screening standards found within its JCPC Bylaws. The funding decisions by a public board using public tax dollars should always be fair, reasonable/rational, easily explainable, and should reflect attentiveness to a deliberate and transparent process that uses all and the best data/information available to derive the most reliable funding options and responsible allocation choices.

According to the information available during the funding process and as explained/detailed in this appeal letter, YDI meets or exceeds all the minimum standards detailed in the JCPC Bylaws by which program applicants are to be scrutinized by the board. Moreover, there is no data, information, or reason that justifies the board's decision to cut the YDI vocational program's budget to less than half of its previous year's allocation and for YDI to be the only currently funded program subjected to such drastic cuts – especially reductions that constitute a $44,032 funding differential from a similar program service provider whose minimum standard outcomes are not better.

As I told Mr. Downs, I principally believe that **injustice anywhere is a threat to justice everywhere** – especially in situations involving government.

Thanks for your time and consideration.

Respectfully submitted,



Darryl L. Bego | Youth Development Initiatives
704-562-3806 | darrylbego@ydiinc.org

Communities In Schools
North Carolina

March 30, 2023

Dani Wilber
Communities in Schools of North Carolina
Cabarrus Performance Learning Center
4521 Weddington Road
Concord, NC 28027
Phone: (704)-260-6800 ex. 76803

To Supporters, Partners, and Participants of Youth Development Initiatives:

My name is Dani Wilber, and I am the Communities in Schools of North Carolina Student Support Specialist at the Cabarrus Performance Learning Center. My role includes collaborating with students, parents, and school staff to set/work towards goals that promote academic success and support the path to graduation. I am also responsible for establishing/maintaining partnerships within the community in order to offer unique opportunities to students, such as participation in Youth Development Initiatives (YDI).

Staying true to Communities in Schools of North Carolina's mission to "surround students with a community of support, empowering them to stay in school and achieve in life," we partnered with YDI for the first time during the 2022-2023 school year. Mr. Darryl Bego presented me with a dynamic curriculum, but the actual implementation of the organization's programming far exceeded any of my expectations. Mr. Bego provided our students with 20 interactive, enriching, and individualized small group sessions that focused on life skills such as self-awareness, personal empowerment, career exploration, education pathway planning, and equipped the students with job readiness skills. He also brought "communities in school" by arranging mock interviews with various local business owners and community leaders. Through our partnership with YDI, I witnessed students grow from being disengaged and struggling to envision their futures, to young adults who radiate confidence in who they are as well as the gifts, strengths, and assets they bring to their networks.

One of the most challenging aspects of my role can be encouraging students to consistently participate in small group opportunities. YDI's curriculum is so engaging and tailored to the needs of each student, that participation was not a challenge for this partnership. In fact, students expressed "disappointment" and being "bummed" that the programming was coming to an end. Some students shared that they "would participate in it all over again even if it were exactly the same". I believe their sentiments stem from the relationships they developed with Mr. Bego and Ms. Michelle, the empowerment they experienced over the 20 weeks, and the bond and sense of community that was cultivated as the group moved through the curriculum together. It was incredibly powerful to witness.

As our first cohort shared, "YDI has to come back because every student would benefit from the experience." I look forward to working with Mr. Bego and the YDI team again next school year and I highly recommend their programming to any school or youth-centered organization.

Thank you,

Dani Wilber

CISNC Student Support Specialist

Cabarrus Performance Learning Center

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
New Business

SUBJECT:
Sheriff's Office - Budget Amendment -Tek84 Body Scanner

BRIEF SUMMARY:
Requesting a budget amendment to use inmate housing revenue to purchase the Tek84 Intercept Body Scanner for the inmate intake process in the Cabarrus County Detention Center. This is a much less invasive way of keeping dangerous contraband from being brought into the facility.

REQUESTED ACTION:
Motion to adopt budget amendment.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Chief Deputy Tessa Burchett

BUDGET AMENDMENT REQUIRED:
Yes

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Tek84 Intercept Quote
- Budget Amendment Request

Quote

June 13, 2023

Capt Joel Wallace
Cabarrus County Sheriff's Office
30 Caroban Ave
Concord, NC
704-920-3129
wjwallace@cabarruscounty.us

QUO 2023-03-31R1

Please see the quotation below for the Tek84 Intercept Body Scanner. The scanner includes all that is listed below as well as (1) built in camera to include a photo of the subject with each scan (2) Your agency's logo on the scanner as well as on each scan report. (3) Training by a medical professional on the use of the product, required radiation training and expert training on reading the scan results. (4) A one-time grab or your JMS database to upload the current list of subjects currently and previously in your facility. (5) 1 Year warranty parts and labor

Qty	Part Number	Description	Net Each	Ext Price
1	SSD-018-1000	Tek84 Intercept Whole Body Security Scanning System High Strength Aluminum Unibody Frame. 106Kv Monoblock Oil Cooled Generator. 34" X 72" X 90" (79" top removed) foot print. 4 Second Scan Time. Variable Scanning Dosage from 0.25 uSv to 8.0 uSv Tethered Ethernet Connected Work Station with 27" Vertically Mounted Touch Screen Monitor. PC with Win OS and (2) 1 TB HDD. RAID. 1 million image storage capacity. Transportable on Built in Heavy Duty Caster System. Corner Mounting Feet. 16 million Grey Scale Levels. 110 V/60hz. 1Kva	$ 139,000.00	$ 139,000.00
1	INT-Training	2.5 days Formal, classroom, on-site	Included	
1	INT-WARRANTY	Initial One (1) Year Parts and Labor on Entire System from Time of Delivery	Included	
1	INT-Shipping	Freight from San Diego, CA to Concord, NC	$ 3,500.00	$ 3,500.00
1	INT-PN 13282	Bundled ICI Thermal Scanner - For Temperature Scanning	$ 20,000.00	$ 20,000.00
5	INT-EXT-WAR	Years of Additional Warranty Starting Month 13**	$ 8,900.00	$ 44,500.00
		Total		**$ 207,000.00**

**additional years of warranty are $8900/yr only if purchased at the time of initial purchase

By execution of this agreement, by an authorized signature, the customer agrees to purchase the products specified subject to the terms and conditions set forth in the agreement and subject to Tek84 and conditions available at www.Tek84.com.

This quote will expire on: 08/12/23
Delivered-at-place: Concord, NC
Terms: Net 30
Taxes: Circle one Exemption certificate attached Tax rate provided here:
*if taxes apply, please request updated quote

Accepted By:

Printed Name and Title:_____

Authorized Signature_____

Date_____

Prepared by:

Kent Smart, VP of Domestic Sales

_____

6/13/2023

Date: 6/19/2023 **Amount:** $207,000.00

Dept. Head: Sheriff Van W. Shaw **Department:** 2110 - Sheriff's Office

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

Utilizing Inmate Housing Revenues to purchase Whole Body Scanner for the Cabarrus County Detention Center

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	9	2130-9860	Equipment & Furniture	-	$ 207,000.00		207,000.00
001	6	2130-6438	Inmate Housing Fees	-	$ 207,000.00		207,000.00
				-	$ 414,000.00	$ -	414,000.00

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
New Business

SUBJECT:
County Manager - Adoption of the Fiscal Year 2024 Budget

BRIEF SUMMARY:
The County Manager presented the Recommended Budget for Fiscal Year 2024 to the Board of Commissioners on Monday, May 15, 2023. A public hearing was held on Monday, June 5, 2023 at 5:30 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 Fiscal Year 2024.

EXPECTED LENGTH OF PRESENTATION:

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:

- FY24 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, 2023, and ending June 30, 2024:

I. General Fund

a. It is estimated that the following revenues will be available in the General Fund:

Ad Valorem Tax Levy	$	236,516,760
Sales Tax/Other		47,896,330
Intergovernmental		28,897,940
Permits and Fees		8,326,455
Sales and Services		15,638,414
Investment Earnings		2,000,000
Miscellaneous		286,100
Fund Balance		221,755
TOTAL REVENUES	**$**	**339,783,754**

b. The following expenditures are budgeted in the General Fund:

General Government	$	42,584,895
Public Safety		75,937,680
Economic and Physical Development		6,358,498
Human Services		56,933,205
Cultural and Recreational		8,045,013
Cabarrus County Schools		
Instructional Services		62,727,073
Charter Schools		5,791,579
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		7,378,552
Charter Schools		743,914
Technology Support Services		552,874
Building Maintenance		1,260,567
Grounds Maintenance		113,783
Schools Information Technology Services (ITS)		8,832
Rowan-Cabarrus Community College		
Current Expense		4,316,397
Other Programs		
Contributions to Other Funds		47,930,078
TOTAL EXPENDITURES	**$**	**339,783,754**

II. Community Investment Fund (CIF)

a. It is estimated the following revenues will be available in the Community Investment Fund:

Sales Tax	$	27,930,000
Miscellaneous		404,000
Lottery Proceeds		2,300,000
Other Financing Sources		44,105,961
TOTAL REVENUES	**$**	**74,739,961**

b. The following expenditures are budgeted in the Community Investment Fund:

Debt Service		
Public Schools		
Principal	$	27,203,000
Interest		10,083,000
Capital Outlay		1,120,000
Rowan Cabarrus Community College		
Principal		1,100,000
Interest		375,000
Capital Outlay		100,000
Other Debt Service		17,489,000
Other Improvements		5,576,867
Contribution to Capital Project Fund		11,193,094
Legal Fees		100,000
Bank Service Charges		400,000
TOTAL EXPENDITURES	**$**	**74,739,961**

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		1,427,390
TOTAL REVENUES	**$**	**2,197,221**

The following expenditures are budgeted in the Cabarrus Arena and Events Center Fund:

Personnel Services	$	195,117
Operations		2,002,104
TOTAL EXPENDITURES	**$**	**2,197,221**

IV. Landfill Fund

a. It is estimated the following revenues will be available in the Landfill Fund:

Intergovernmental	$	57,000
Permits & Fees		150,000
Sales & Services		1,259,000
Contribution from General Fund		618,400
TOTAL REVENUES	**$**	**2,084,400**

b. The following expenditures are budgeted in the Landfill Fund:

Personnel Services	$	824,350
Operations		1,260,050
TOTAL EXPENDITURES	**$**	**2,084,400**

V. 911 Emergency Telephone Fund

a. It is estimated the following revenues will be available in the 911 Emergency Telephone Fund:

Intergovernmental	$	346,955
Investment Earnings		5,000
		64683
TOTAL REVENUES	**$**	**416,638**

b. The following expenditures are budgeted in the 911 Emergency Telephone Fund:

Operations	$	416,638
TOTAL EXPENDITURES	**$**	**416,638**

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	$	2,170,000
TOTAL REVENUES	**$**	**2,170,000**

b. The following expenditures are budgeted in the Intergovernmental Fund:

Education	$	2,170,000
TOTAL EXPENDITURES	**$**	**2,170,000**

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	$	17,383,555
Investment Earnings		5,000
Miscellaneous		970,785
Contribution from General Fund		230,000
TOTAL REVENUES	**$**	**18,589,340**

b. The following expenditures are budgeted in the Health and Dental Insurance Fund:

Operations	$	18,589,340
TOTAL EXPENDITURES	**$**	**18,589,340**

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	$	3,487,537
Investment Earnings		20,000
Fund Balance		523,040
TOTAL REVENUES	**$**	**4,030,577**

b. The following expenditures are budgeted in the Workers Compensation and Liability Fund:

Operations	$	4,030,577
TOTAL EXPENDITURES	**$**	**4,030,577**

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	$	7,099,003
TOTAL REVENUES	**$**	**7,099,003**

b. The following expenditures are budgeted in the Fire Tax Districts Fund:

Allen Fire Tax District	$	702,724
Cold Water Fire Tax District		335,329
Concord Rural Fire Tax District		52,582
Flowe's Store Fire Tax District		321,397
Georgeville Fire Tax District		297,610
Gold Hill Fire Tax District		52,556
Harrisburg Rural Fire Tax District		1,315,896
Jackson Park (City of Concord) Fire Tax District		247,631
Kannapolis Rural Fire Tax District		236,312
Midland Fire Tax District		1,138,412
Mt. Mitchell Fire Tax District		131,480
Mt. Pleasant Rural Fire Tax District		625,375
Northeast Fire Tax District		210,027
Odell Fire Tax District		1,100,721
Richfield-Misenheimer Fire Tax District		11,792
Rimer Fire Tax District		319,159
TOTAL EXPENDITURES	**$**	**7,099,003**
GRAND TOTAL – ALL FUNDS – REVENUES	**$**	**451,510,894**
GRAND TOTAL – ALL FUNDS – EXPENDITURES	**$**	**451,510,894**

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, 2023, and ending June 30, 2024, 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, 2023, of $32,065,390,204, at an estimated collection rate of 98.75% on Real, Personal and Public Service property. A 99.5% collection rate on vehicles. An estimated total valuation of Real, Personal and Public Service property is $29,252,390,204 and vehicle of $2,813,000,000.

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, 2023, and ending June 30, 2024:

Allen Fire Tax District	**11.0 ¢**
Based on estimated assessed valuation in the Allen Fire Tax District of $646,926,214	
Cold Water	**8.0 ¢**
Based on estimated assessed valuation in the Cold Water Fire Tax District of $424,466,662	
Concord Rural	**14.0 ¢**
Based on estimated assessed valuation in the Concord Rural Fire Tax District of $38,033,648	
Flowe's Store	**10.0 ¢**
Based on estimated assessed valuation in the Flowe's Store Fire Tax District of $325,465,161	
Georgeville	**9.20 ¢**
Based on estimated assessed valuation in the Georgeville Fire Tax District of $327,583,709	
Gold Hill	**9.0 ¢**
Based on estimated assessed valuation in the Gold Hill Fire Tax District of $59,135,026	
Harrisburg Rural	**15.0 ¢**
Based on estimated assessed valuation in the Harrisburg Fire Tax District of $888,368,361	
Jackson Park (City of Concord)	**14.0 ¢**
Based on estimated assessed valuation in the Jackson Park (City of Concord) Fire Tax District of $179,118,019	
Kannapolis Rural	**10.0 ¢**
Based on estimated assessed valuation in the Kannapolis Rural Fire Tax District of $239,303,597	
Midland	**10.0 ¢**
Based on estimated assessed valuation in the Midland Fire Tax District of $1,152,822,731	
Mt. Mitchell	**10.0 ¢**
Based on estimated assessed valuation in the Mt. Mitchell Fire Tax District of $133,144,559	
Mt. Pleasant Rural	**11.80 ¢**
Based on estimated assessed valuation in the Mt. Pleasant Rural Fire Tax District of $536,687,314	
Northeast	**12.70 ¢**
Based on estimated assessed valuation in the Northeast Fire Tax District of $167,469,180	
Odell	**8.50 ¢**
Based on estimated assessed valuation in the Odell Fire Tax District of $1,311,357,422	
Richfield-Misenheimer	**7.0 ¢**
Based on estimated assessed valuation in the Richfield-Misenheimer Fire Tax District of $17,058,239	
Rimer	**12.0 ¢**
Based on estimated assessed valuation in the Rimer Fire Tax District of $269,332,571	

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, 2023, in the table above, at an estimated combined collection rate of 98.75%.

Section 4 – Authorized Positions
The Board authorizes **1,482** total positions equaling **1,409.99** full-time equivalents. This includes the following new positions authorized in FY24:

Department	# Positions	# FTE	Title	Grade
Information Technology	1	1	Cyber Security Analyst	27
Infrastructure Asset Management – Building Maintenance	1	1	Building Maintenance Supervisor	20
Sheriff's Office	1	1	Sex Offender Registry Investigator (Detective)	18
Sheriff's Office	1	1	Records Management System (RMS) Administrator	18
Sheriff's Office - Harrisburg	2	2	Detective	18
Sheriff's Office - Harrisburg	1	1	Sergeant	13
Emergency Medical Services	1	1	Training and Education Captain	24
Economic Development Corporation	1	1	Local Business Support Manager	21
Library Services	2	1	Library Assistant	10
Library Services	1	1	Library Branch Manager	21
New Positions for Additional Active Living & Parks and Library Facilities Opening in FY25				
Active Living & Parks -Mt Pleasant	1	1	Supervisor	16
Active Living & Parks -Mt Pleasant	1	1	Program Assistant	12
Active Living & Parks -Mt Pleasant	3	1.2	Center Facility Operators- Part-Time (0.40 FTE)	12
Active Living & Parks -Mt Pleasant	2	0.7	Rangers Part-Time (0.348 FTE)	7
Active Living & Parks -Afton	1	1	Supervisor	16
Active Living & Parks -Afton	1	1	Wellness Supervisor	17
Active Living & Parks -Afton	3	3	Program Assistant	12
Library Services – Mt. Pleasant	1	1	Librarian	17
Library Services – Mt. Pleasant	2	2	Senior Library Assistant	13
Library Services – Mt. Pleasant	2	1	Library Assistant Part Time	10
Library Services – Afton	1	1	Branch Manager	21
Library Services – Afton	2	2	Librarian (Adult, Children)	17
Library Services – Afton	3	3	Senior Library Assistant (adult, teen, children)	13
Library Services – Afton	6	6	Library Assistant Full-Time	10
Library Services – Afton	7	3.5	Library Assistant Part-Time	10
Infrastructure Asset Management	1	1	Building Maintenance Mechanics	13
Infrastructure Asset Management	1	1	HVAC Technician	16
Infrastructure Asset Management	1	1	Grounds Maintenance Worker	8
Infrastructure Asset Management	4	4	Custodians	6
Total	**55**	**46.4**		

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.

l. In accordance with 2 C.F.R. § 200.320(a)(1)(iv), the applicable provisions of North Carolina law, and Resolution No. 2022-24, Cabarrus County hereby self-certifies the following micro-purchase

thresholds, each of which is a "higher threshold consistent with State law" under 2 C.F.R. § 200.320(a)(1)(iv)(C):
(a) $30,000, for the purchase of "apparatus, supplies, materials, or equipment"; and
(b) $30,000, for the purchase of "construction or repair work"; and
(c) $50,000, for the purchase of services not subject to competitive bidding under North Carolina law; and
(d) $50,000, for the purchase of services subject to the qualifications-based selection process in the Mini-Brooks Act; provided that such threshold shall apply to a contract only if the Unit has exercised an exemption to the Mini-Brooks Act, in writing, for a particular project pursuant to G.S. 143-64.32. If the exemption is not authorized, the micro-purchase threshold shall be $0.00

Section 6.
This ordinance and the budget documents shall be the basis for the financial plan for the County of Cabarrus for the 2023-2024 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 19th day of June 2023.

_____
Stephen M. Morris, Chairman

_____
Lauren Linker, Clerk to the Board

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Old Business

SUBJECT:
County Manager - Fiscal Year 2023 Funding Re-appropriations

BRIEF SUMMARY:
Funds budgeted in the prior fiscal year (FY23) need to be carried over to fiscal year (FY24) for use. These funds were not used in FY23 for a variety of reasons. Carrying over these funds from FY23 to FY24, through an appropriation of fund balance or revenue for reimbursement grants, is required to complete purchases as planned.

REQUESTED ACTION:
Motion to amend the Fiscal Year 2023-2024 Budget Ordinance to allow the carry-over of unspent funds as outlined on the attached re-appropriation list from the 2022-2023 Budget Ordinance and authorize the County Budget Director to prepare the associated Budget Amendment.

EXPECTED LENGTH OF PRESENTATION:
1 Minute

SUBMITTED BY:
Rosh Khatri, Budget Director

BUDGET AMENDMENT REQUIRED:
Yes

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Re-appropriation Request Fy23 to FY24
- Budget Amendment

Department	Project/Grant	Account Information Org-Object-Proj FY23 GL Codes	Account Information Org-Object-Proj FY24 GL Codes	Account Description	Amount	Justification (including impact if funding is not carried forward)
GENERAL GOVERNMENT						
ITS	ERP Upgrade project	00191810-9570	00191810-9570	Services Contracts	$ 2,000,000.00	This project is still developing. Funding was recently allocated.
Non-Departmental	Referral & Sign-On Bonus Funds	00191910-9124	00191910-9124	Sign On/Referral Bonuses	$ 300,000.00	Re-appropriate Referral and Sign-On Bonus funds approved by BOC 5-15-2023
					$ 2,300,000.00	
PUBLIC SAFETY						
Animal Shelter	Donations for Animal Care	00162145-6805	00192145-9628	Donation Expenditures	$ 13,000.00	These donations are being utilized to treat wounded and/or abandoned animals which do not met the parameters for treatment by the County Animal Shelter; this amount will likely be $ 15,000 to $ 16,000 by Year End
Animal Shelter	Donations for Animal Care	00192145-9605	00192145-9628	Donation Expenditures	$ 15,450.00	These are the remainder from the Discretionary Donation Funds transferred into Consultants from Donations in a prior year. These donations are being utilized to treat wounded and/or abandoned animals which do not met the parameters for treatment by the County Animal Shelter
Animal Control	Upfits for A/C Vehicles	00192140-9863	00192140-9863	Motor Vehicles	$ 35,021.00	Upfits for A/C Vehicles ordered but not yet delivered.
Sheriff	Upfits for Sheriff's Vehicles	00192110-9863	00192110-9863	Motor Vehicles	$ 316,981.15	Upfits for Sheriff's Vehicles ordered but not yet delivered.
Sheriff	Sheriff's Vehicles for SROs (REDUCED 5/23/2023)	00192110-9863	00192110-9863	Motor Vehicles	$ 24,430.00	Vehicles for 2 SROs,EXPENSE for UPFITS.
Sheriff	Patrol Suite Cubicles	00192110-9860	00192110-9860	Equipment & Furniture	$ 142,000.00	
Sheriff	BOMB TRUCK	00192110-9860-BOMB	00192110-9860-BOMB	Bomb Equipment	$ 18,638.70	These funds are required to finish upfitting the Bomb Truck when it is delivered.
SHERIFF	HUMAN TRAFFICKING	00162110-6255-HTRAF	00162110-6255-HTRAF	NC DEPT OF PUBLIC SAFETY	($841,067.00)	TO BUDGET THE BALANCE OF HUMAN TRAFFICKING GRANT FUNDS RECIVED AND NOT SPENT. GRANT FUNDS WERE RECIVED IN ADVANCE AND REVENUE WILL BE RECOGNIZED
SHERIFF	HUMAN TRAFFICKING	00192110-9101-HTRAF	00192110-9101-HTRAF	Sal & Wags	$ 513,463.00	TO BUDGET BALANCE OF HUMAN TRAFFICKING GRANT EXPENDITURES
SHERIFF	HUMAN TRAFFICKING	00192110-9201-HTRAF	00192110-9201-HTRAF	SS	$ 31,957.00	THIS IS A FIVE YEAR GRANT AND EXEPDNITURES WERE NOT BUDGETED AS
SHERIFF	HUMAN TRAFFICKING	00192110-9202-HTRAF	00192110-9202-HTRAF	Medicare	$ 7,472.00	PART OF FY 2024 BUDGET
SHERIFF	HUMAN TRAFFICKING	00192110-9205-HTRAF	00192110-9205-HTRAF	GH Ins	$ 103,357.00	THERE IS NOT A COUNTY MATCH AND UNSPENT FUNDS WILL BE BUDGETED
SHERIFF	HUMAN TRAFFICKING	00192110-9206-HTRAF	00192110-9206-HTRAF	Vision	$ 241.00	FISCAL YEAR
SHERIFF	HUMAN TRAFFICKING	00192110-9207-HTRAF	00192110-9207-HTRAF	Life Ins	$ 324.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9210-HTRAF	00192110-9210-HTRAF	Retirement	$ 81,255.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9230-HTRAF	00192110-9230-HTRAF	Work Comp	$ 10,863.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9235-HTRAF	00192110-9235-HTRAF	Def C 401k	$ 25,672.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9340-HTRAF	00192110-9340-HTRAF	Uniforms	$ 8,402.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9342-HTRAF	00192110-9342-HTRAF	Minor Tech	-	
SHERIFF	HUMAN TRAFFICKING	00192110-9420-HTRAF	00192110-9420-HTRAF	Cell Phone	$ 2,000.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9610-HTRAF	00192110-9610-HTRAF	Travel&Edc	$ 16,977.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9640-HTRAF	00192110-9640-HTRAF	Ins & Bond	$ 11,520.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9862-HTRAF	00192110-9862-HTRAF	Technology	$ 24,088.00	
SHERIFF	HUMAN TRAFFICKING	00192110-9863-HTRAF	00192110-9863-HTRAF	Motor Vehi	$ 3,476.00	
EMS		00192730-9863	00192730-9863	MOTOR VEHICLES	$ 70,000.00	Ambulances have a very long lead time since Co-vid. Purchase Orders will need to be rolled over for FY24 along with these funds which cover tag, taxes and any other cost associated with getting the vehicle ready for use.

Department	Project/Grant	Account Information Org-Object-Proj FY23 GL Codes	Account Information Org-Object-Proj FY24 GL Codes	Account Description	Amount	Justification (including impact if funding is not carried forward)
Emergency Management	Ongoing projects	00192710-9431	00192710-9431	McGuire	$ 8,662.86	Funds provided by Duke Energy to support support training and the purchase of equipment and supplies for the congregate reception center as detailed in the McGuire Nuclear Station Plan. Historically this account is re-appropriated each year as funds are not awarded on the county's fiscal year schedule.
Emergency Management	Ongoing projects	00192710-9482	00192710-9482	Emergency Management Performance Grant	$ 3,682.94	Grant funds provided to be spent on allowable equipment as listed in the Authorized Equipment List (AEL) under the terms of the EMPG. Historically this account is re-appropriated each year as funds are not awarded on the county's fiscal year schedule.
Emergency Management	LEPC Lunch and Learn	00192710-9636	00192710-9636-TIER2	Tier II Grant	$ 1,000.00	Period of performance on this grant is from January 1,2023 to January 31, 2024. Funds will need to be re-appropriated in order to fund the lunch and learn meetings for the LEPC during 2023.
Emergency Management	Prime mover	00192710-9395-DPR7	00192710-9395-DPR7	Homeland Security DPR-7 grant	$ 65,000.00	Period of performance on this grant is from September 1, 2022 to February 28, 2025. Funds will need to be re-appropriated to finance purchase of a prime mover.
Courts	Building Rental	00192210-9401-BM	00192210-9401-BM	Building and Equipment ental	$ 14,295.00	Leasing Warehouse at Gibson Mill for the state and county furniture from the courthouse as we transition from the 1975 to the 2023 courthouse
					$ 728,161.65	
ECONOMIC AND PHYSICAL DEVELOPMENT						
Planning	School Capacity Planning Modeling Project	00193230-9605	00193230-9605	Consultants	$ 20,000.00	Phase one of project in progress and will not be complete prior to end of fiscal year. Modeling update can not occur until phase one of project is completed by outside agency.
Community Development	Duke Energy Helping Homes Fund	00193250-9493-DECHS	00193250-9493-DECHS	Health & Safety materials & contract labor	$ 26,696.00	Funds for this program are allocated on a calendar year basis and are available through December 31st, 2023.
Community Development	Duke Energy Helping Homes Fund	00193250-9493-DECHV	00193250-9493-DECHV	HVAC & Appliance materials & contract labor	$ 13,265.00	Funds for this program are allocated on a calendar year basis and are available through December 31st, 2023.
Community Development	BCBS Healthy Homes Initiative	00193250-9493-BCBS	00193250-9493-BCBS	Health & Safety materials & contract labor	$ 7,000.00	Funds for this program are allocated on a calendar year basis and are available through December 31st, 2023.
Soil & Water	Fencing for dock at Clarke Creek for safety when easement property opens to public at city park opening.	00193270-9445	00193270-9445	Purchased services	$ 10,000.00	We have not gotten access to the property through the new city park or neighboring property.
ECONOMIC AND PHYSICAL DEVELOPMENT TOTAL					**$ 76,961.00**	
HUMAN SERVICES						
DHS/Children's Services	Special Needs Kids	00195630-9332	00195630-9332	enhance Adoption Svs program	$ 251,247.00	These funds are awarded annually and counties are allowed to carry over funds from year to year until spent. Balance @05.05.2023 = $252,746.58 - $1,500 = $251,247
DHS/Children's Services	Triple P funds	00195630-94003	00195630-94003	Triple P Funding	$ 3,514.63	The positive parenting program provides parenting education/intervention and the funds are carried over until spent.
DHS/Aging Services	DHS/Aging Services - grant 7/22 thru 9/24	00195660-944501-CHOR	00195660-944501-CHOR	CCOG ARPA funding	$ 75,000.00	In Home services - Grant contract runs from 07/2022 thru 09/2024
DHS/Aging Services	DHS/Aging Services - grant 7/22 thru 9/24	00165660-630101-CHOR	00165660-630101-CHOR	ARPA - Chore Services	$ (75,000.00)	100% reimbursement through ARMS system for In Home services
DHS/Aging Services	DHS/Aging Services - grant 7/22 thru 9/24	00195660-986001-DTEC	00195660-986001-DTEC	ARPA Equipment funding	$ 25,000.00	In home services to address social isolation - Grant contract runs from 07/2022 thru 09/2024
DHS/Aging Services	DHS/Aging Services - grant 7/22 thru 9/24	00165660-630101-DTEC	00165660-630101-DTEC	ARPA - Digital Technology Svs	$ (25,000.00)	100% reimbursement through ARMS system for In Home services
DHS/Aging Services	DHS/Aging Services - grant 7/22 thru 9/24	00165660-630101-VPD	00165660-630101-VPD	ARPA - Volunteer prgm development	$ (20,000.00)	Volunteer svs - 100% reimbursement through ARMS system for In Home services
DHS/Aging Services	DHS/Aging Services - grant 7/22 thru 9/24	00165660-630101-DTRN	00165660-630101-DTRN	ARPA - Digital Training and programming	$ (45,000.00)	technology/training - 100% reimbursement through ARMS system for In Home services
Transportation	TRANSPORTATION 5311 GRANT - 22-CT-042	00165240-6312-0488	00165240-6312-0488	5311 CAPITAL GRANT	$ (98,743.00)	Remaining Federal and State grant revenues not reimbursed in FY 2023 and not budgeted in FY 2024
Transportation	TRANSPORTATION 5311 GRANT - 22-CT-042	00195240-9831-0488	00195240-9831-0488	5311 CAPITAL GRANT	$ 109,714.00	Remaining Federal, State and Local share of 5311 capital grant funds not spent in FY 23 and not budgeted in FY 2024
Transportation	TRANSPORTATION 5311 GRANT - 23-XX-042	00165240-6312-0488	00165240-6312-0488	5311 CAPITAL GRANT	$ (504,612.00)	Remaining Federal and State grant revenues not reimbursed in FY 2023 and not budgeted in FY 2024

Department	Project/Grant	Account Information Org-Object-Proj FY23 GL Codes	Account Information Org-Object-Proj FY24 GL Codes	Account Description	Amount	Justification (including impact if funding is not carried forward)
Transportation	TRANSPORTATION 5311 GRANT - 23-XX-042	00195240-9831-0488	00195240-9831-0488	5311 CAPITAL GRANT	$ 560,680.00	Remaining Federal, State and Local share of 5311 capital grant funds not spent in FY 23 and not budgeted in FY 2024
Cooperative Extension	4-H Cannon Grant	00195410-9356 4HCAN	00195410-9356 4HCAN	Program Supplies	$ 2,300.00	Grant cycle runs through October. Funds need to be re-appropriated to continue the programs supported by the grant.
Cooperative Extension	4-H Cannon Grant	00195410-9104 4HCAN	00195410-9104 4HCAN	Temporary Employees	$ 3,500.00	Grant cycle runs through October. Funds need to be re-appropriated to continue the programs supported by the grant.
Cooperative Extension	4-H Cannon Grant	00195410-9201 4HCAN	00195410-9201 4HCAN	Social Security	$ 200.00	Grant cycle runs through October. Funds need to be re-appropriated to continue the programs supported by the grant.
Cooperative Extension	4-H Cannon Grant	00195410-9202 4HCAN	00195410-9202 4HCAN	Medicare	$ 195.00	Grant cycle runs through October. Funds need to be re-appropriated to continue the programs supported by the grant.
Cooperative Extension	4-H Cannon Grant	00195410-9230 4HCAN	00195410-9230 4HCAN	Worker's Comp	$ 247.00	Grant cycle runs through October. Funds need to be re-appropriated to continue the programs supported by the grant.
Cooperative Extension	4-H Cannon Grant	00195410-9610 4HCAN	00195410-9610 4HCAN	Travel	$ 675.00	Grant cycle runs through October. Funds need to be re-appropriated to continue the programs supported by the grant.
Cooperative Extension	4-H Cannon Grant	00195410-9640 4HCAN	00195410-9640 4HCAN	Insurance & Bonds	$ 215.00	Grant cycle runs through October. Funds need to be re-appropriated to continue the programs supported by the grant.
Other Human Services	OPIOID FUNDING MATCH FROM VITAL STARATEGIES	00165910-6259-VITAL	00165910-6259-VITAL	GLOBAL GRANT PROGRAM	$ (70,000.00)	GRANT FUNDS - $70,000 AWARDED ANNUALLY FOR THREE YEARS. FY24 IS YEAR 2 OF 3. GRANT FUNDS ARE USED TO SUPPLEMENT COUNTY'S COMMITMENT TO ALLOCATE FUNDS FROM OPIOID LITIGATION SETTLEMENTS TOWARD NALOXONE DISTRIBUTION AND SYRINGE SERVICE PROGRAM
Other Human Services	OPIOID FUNDING EXPENDITURES	00195910-9705-VITAL	00195910-9705-VITAL	PUBLIC HEALTH AUTHORITY	$ 70,000.00	GRANT EXPENDITURES - FUNDS ALLOCATED TO CHA TOWARD NALOXONE DISTRIBUTION AND SYRINGE SERVICE PROGRAM.
DHS	Emergency Assistance	00195615-9461-232-1	00195615-9461-232-1	AFDC Emergency Assistance	$ 78,872.12	Would like to carry forward the remaining balance. Funds were not used in full due to PHE waivers being in place, along with ERAP and LIHWAP which helped offset County costs.
HUMAN SERVICES TOTAL					**$ 343,004.75**	
CULTURE AND RECREATION						
Active Living & Parks	Fish Stocking After Dam Repair	00198140-9357 FLP	00198140-9357 FLP	Park Operation Supplies	$ 21,000.00	Restocking of Frank Liske Park lake after regulated dam repairs. Delay of repairs, lower water level and higher temperatures has placed a need to stock the lake in the Fall/Winter of FY24.
Active Living & Parks		00198140-9605	00198140-9605	Consultant	$ 202,500.00	Department received funding at the April BOC regular meeting to update the Comprehensive Master Plan. These funds will not be encumbered in a contract prior to the end of the FY.
CULTURE AND RECREATION TOTAL					**$ 223,500.00**	
OVERALL GRAND TOTAL					**$ 3,671,627.40**	

Budget Revision/Amendment Request

Date: 6/19/2023 **Amount:** 3,671,627.40

Dept. Head: Rosh Khatri **Department:** Budget

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

Funds budgeted in fiscal year 23 need to be carried over to fiscal year 24 for use. These funds were not used in FY23 for a variety of reasons. Carrying- over these funds from FY23 to FY24, through an appropriation of fund balance or revenue for reimbursement grants, is required to complete purchases as planned.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	9	1810-9570	Services Contracts	$ -	$ 2,000,000.00		$ 2,000,000.00
001	6	1810-6901	Fund Balance Appropriated	$ -	$ 2,000,000.00		$ 2,000,000.00
001	9	1910-9124	Sign On/ Referral Bonus	$ -	$ 300,000.00		$ 300,000.00
001	6	1910-6901	Fund Balance Appropriated	$ -	$ 300,000.00		$ 300,000.00
001	9	2145-9628	Donations Expenditures	$ -	$ 28,450.00		$ 28,450.00
001	6	2145-6901	Fund Balance Appropriated	$ -	$ 28,450.00		$ 28,450.00
001	9	2140-9863	Motor Vehicles	$ 119,500.00	$ 35,021.00		$ 154,521.00
001	6	2140-6901	Fund Balance Appropriated	$ -	$ 35,021.00		$ 35,021.00
001	9	2110-9863	Motor Vehicles	$ 1,543,150.00	$ 416,981.15		$ 1,960,131.15
001	9	2110-9860	Equipment & Furniture	$ 58,000.00	$ 142,000.00		$ 200,000.00
001	9	2110-9860-BOMB	Bomb Equipment	$ -	$ 18,638.70		$ 18,638.70
001	6	2110-6901	Fund Balance Appropriated	$ -	$ 577,619.85		$ 577,619.85
001	9	2110-9101-HTRAF	Salaries & Wages	$ -	$ 513,463.00		$ 513,463.00
001	9	2110-9201-HTRAF	Social Security	$ -	$ 31,957.00		$ 31,957.00
001	9	2110-9202-HTRAF	Medicare	$ -	$ 7,472.00		$ 7,472.00
001	9	2110-9205-HTRAF	Group Hospital Insurance	$ -	$ 103,357.00		$ 103,357.00
001	9	2110-9206-HTRAF	Vision	$ -	$ 241.00		$ 241.00
001	9	2110-9207-HTRAF	Life Insurance	$ -	$ 324.00		$ 324.00

001	9	2110-9210-HTRAF	Retirement	$ -	$ 81,255.00		$ 81,255.00
001	9	2110-9230-HTRAF	Workers Compensation	$ -	$ 10,863.00		$ 10,863.00
001	9	2110-9235-HTRAF	Deferred Compensation 401k	$ -	$ 25,672.00		$ 25,672.00
001	9	2110-9340-HTRAF	Uniforms	$ -	$ 8,402.00		$ 8,402.00
001	9	2110-9420-HTRAF	Cell Phones	$ -	$ 2,000.00		$ 2,000.00
001	9	2110-9610-HTRAF	Travel and Education	$ -	$ 16,977.00		$ 16,977.00
001	9	2110-9640-HTRAF	Insurance & Bonds	$ -	$ 11,520.00		$ 11,520.00
001	9	2110-9862-HTRAF	Technology	$ -	$ 24,088.00		$ 24,088.00
001	9	2110-9863-HTRAF	Motor Vehicles	$ -	$ 3,476.00		$ 3,476.00
001	6	2110-6255-HTRAF	NC DEPT OF PUBLIC SAFETY	$ -	$ 841,067.00		$ 841,067.00
001	9	2210-9401-BM	Building and Equipment Rental	$ -	$ 14,295.00		$ 14,295.00
001	9	2210-6901	Fund Balance Appropriated	$ -	$ 14,295.00		$ 14,295.00
001	9	2730-9863	Motor Vehicles	$ 504,000.00	$ 70,000.00		$ 574,000.00
001	9	2730-6901	Fund Balance Appropriated	$ -	$ 70,000.00		$ 70,000.00
001	9	2710-9431	McGuire	$ 10,000.00	$ 8,662.86		$ 18,662.86
001	9	2710-9842	Emergency Management Performance Grant	$ 12,500.00	$ 3,682.94		$ 16,182.94
001	9	2710-9636-TIER2	Tier II Grant	$ -	$ 1,000.00		$ 1,000.00
001	9	2710-9395-DPR7	Homeland Security DPR-7 Grant	$ -	$ 65,000.00		$ 65,000.00
001	6	2710-6901	Fund Balance Appropriated	$ -	$ 78,345.80		$ 78,345.80
001	9	3230-9605	Consultants	$ 45,500.00	$ 20,000.00		$ 65,500.00
001	6	3230-6901	Fund Balance Appropriated	$ -	$ 20,000.00		$ 20,000.00
001	9	3250-9493-DECHS	Health & Safety Materials and Contract Labor	$ -	$ 26,696.00		$ 26,696.00
001	9	3250-9493-DECHV	HVAC & Appliance Materials and Contract Labor	$ -	$ 13,265.00		$ 13,265.00
001	9	3250-9493-BCBS	Health & Safety Materials and Contract Labor	$ -	$ 7,000.00		$ 7,000.00
001	6	3250-6901	Fund Balance Appropriated	$ -	$ 46,961.00		$ 46,961.00

001	9	3270-9445	Purchased Services	$ 5,000.00	$ 10,000.00		$ 15,000.00
001	6	3270-6901	Fund Balance Appropriated	$ -	$ 10,000.00		$ 10,000.00
001	9	5630-9332	Special Needs Kids	$ -	$ 251,247.00		$ 251,247.00
001	9	5630-94003	Triple P Funding	$ 3,515.00	$ 3,514.63		$ 7,029.63
001	6	5630-6901	Fund Balance Appropriated	$ -	$ 254,761.63		$ 254,761.63
001	9	5660-944501-CHOR	CCOG ARPA Funding	$ -	$ 75,000.00		$ 75,000.00
001	6	5660-630101-CHOR	ARPA - Chore Services	$ -	$ 75,000.00		$ 75,000.00
001	9	5660-986001-DTEC	ARPA Equipment Funding	$ -	$ 25,000.00		$ 25,000.00
001	6	5660-630101-DTEC	ARPA - Digital Technology Services	$ -	$ 25,000.00		$ 25,000.00
001	6	5660-630101-VPD	ARPA - Volunteer Program Development	$ -	$ 20,000.00		$ 20,000.00
001	6	5660-630101-DTRN	ARPA - Digital Training and Programming	$ -	$ 45,000.00		$ 45,000.00
001	6	5240-6312-0488	5311 Capital Grant	$ -	$ 603,355.00		$ 603,355.00
001	9	5240-9831-0488	5311 Capital Grant	$ -	$ 670,394.00		$ 670,394.00
001	6	1910-6901	Fund Balance Appropriated	$ -	$ 2,039.00		$ 2,039.00
001	9	5410-9356-4HCAN	Program Supplies	$ -	$ 2,300.00		$ 2,300.00
001	9	5410-9104-4HCAN	Temporary Employees	$ -	$ 3,500.00		$ 3,500.00
001	9	5410-9201-4HCAN	Social Security	$ -	$ 200.00		$ 200.00
001	9	5410-9202-4HCAN	Medicare	$ -	$ 195.00		$ 195.00
001	9	5410-9230-4HCAN	Workers Compensation	$ -	$ 247.00		$ 247.00
001	9	5410-9610-4HCAN	Travel and Education	$ -	$ 675.00		$ 675.00
001	9	5410-9640-4HCAN	Insurance & Bonds	$ -	$ 215.00		$ 215.00
001	6	5410-6901	Fund Balance Appropriated	$ -	$ 7,332.00		$ 7,332.00
001	6	5910-6259-VITAL	Global Grant Program	$ -	$ 70,000.00		$ 70,000.00
001	9	5910-9705-VITAL	Public Health Authority	$ -	$ 70,000.00		$ 70,000.00
001	9	5615-9461-232-1	AFDC Emergency Assistance	$ -	$ 78,872.12		$ 78,872.12

001	6	5615-6901	Fund Balance Appropriated	$ -	$ 78,872.12		$ 78,872.12
001	9	8140-9357-FLP	Park Operation Supplies	$ 20,800.00	$ 21,000.00		$ 41,800.00
001	9	8140-9605	Consultants	$ -	$ 202,500.00		$ 202,500.00
001	6	8140-6901	Fund Balance Appropriated	$ -	$ 223,500.00		$ 223,500.00

Total $ -

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 19, 2023
6:30 PM

AGENDA CATEGORY:
Old Business

SUBJECT:
Finance - Capital Improvement Plan ("CIP") Funded Projects in the FY2024 General Fund Budget

BRIEF SUMMARY:
The County's CIP projects that were approved as part of the FY 2024 budget process are included as an attachment. The projects will be recorded and tracked in the County's Capital Project Fund and the School's Capital Project Fund. The projects are being funded by a contribution from the General Fund, the Community Investment Fund and future FY 2024 Debt. The County Capital Project Fund and the School Capital Project Fund project ordinances, the related budget amendment and applicable reimbursement resolutions are included with this agenda item.

REQUESTED ACTION:
Motion to adopt the project ordinances for the County Capital Project Fund and the School Capital Project Fund, related budget amendment and applicable reimbursement resolutions.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
James Howden, Finance Director

BUDGET AMENDMENT REQUIRED:
Yes

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Budget Amendment
- FY24 PAYGO / CIP Project List
- FD 380 Budget Ordinance
- FD 390 Budget Ordinance
- RR - Concord HS HVAC
- RR - Cox Mill ES Roof
- RR - Forest ES HVAC
- RR - Fred L Wilson Addition
- RR - Hickory Ridge Roof
- RR - Human Services Facility
- RR - Mary Frances Wall Reno
- RR - Opportunity School
- RR - Public School Training Facility
- RR - RCCC South Campus HVAC
- RR - Weddington Hills ES HVAC
- RR - Wolf Meadow ES Roof

Budget Revision/Amendment Request

Date: 6/19/2023 **Amount:** 184,355,532

Dept. Head: James Howden **Department:** Finance

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

TRUE

To Budget Landfill Compactor purchase, School Capital Projects, Deferred Maintenance Projects and County Capital Projects with available cash (Paygo Projects), Contribution from General Fund and FY 2024 Debt Proceeds. Projects have already been approved by Board of Commissioners.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
270	6	4610-6932	Contribution from CIF	-	935,000		935,000
270	9	4610-9860-2221	Equipment and Vehicles	-	935,000		935,000
100	6	0000-6901	Fund Balance Appropriations	-	935,000		935,000
100	9	0000-971015	Contribution to Landfill	-	935,000		935,000
			Purchase New Compactor for Landfill				
390	6	7210-6932-DM24	Contribution from CIF	-	5,400,532		5,400,532
390	6	7230-6932-DM24	Contribution from CIF	-	1,500,000		1,500,000
390	9	7210 9501 DM24	Building and Grounds Maintenance	-	5,400,532		5,400,532
390	9	7230 9501 DM24	Building and Grounds Maintenance	-	1,500,000		1,500,000
100	6	0000-6901	Fund Balance Appropriations	935,000	6,900,532		7,835,532
100	9	0000-9708	Contribution to Capital Project Fund	-	6,900,532		6,900,532
			Budget Deferred Maintenance for the Schools				
390	6	7210-6932-CCTRK	Contribution from CIF	-	1,500,000		1,500,000
390	9	7210-9830-CCTRK	Other Improvements	-	1,500,000		1,500,000
390	6	7210-6932-HRTRK	Contribution from CIF	-	1,700,000		1,700,000
390	9	7210-9830-HRTRK	Other Improvements	-	1,700,000		1,700,000
390	6	7210-6932-TENIS	Contribution from CIF	-	1,200,000		1,200,000
390	9	7210-9830-TENIS	Other Improvements	-	1,200,000		1,200,000
100	6	0000-6901	Fund Balance Appropriations	7,835,532	4,400,000		12,235,532
100	9	0000-9708	Contribution to Capital Project Fund	6,900,532	4,400,000		11,300,532
			Budget PayGo School Projects				

380	6	8140-6932-VVBWK	Contribution from CIF		85,000		85,000
380	9	8140-9830-VVBWK	Other Improvements		85,000		85,000
			Budget Boardwalk Vietnam Park				
380	6	1110-6932	Contribution from CIF		4,000,000		4,000,000
380	9	1110-9801	Land Acquisition		4,000,000		4,000,000
			Budget Land Acquisition				
380	6	8140-6932-FLP	Contribution from CIF		1,100,000		1,100,000
380	9	8140-9830-FLP	Other Improvements		1,100,000		1,100,000
			Budget Additional funds for mini-golf and park office				
380	6	2110-6932-SCHIL	Contribution from CIF		1,000,000		1,000,000
380	9	2110-9860-SCHIL	Equipment & Furniture		1,000,000		1,000,000
			Budget Chiller at Sheriff's Admin Building				
100	6	0000-6901	Fund Balance Appropriations	12,235,532	6,185,000		18,420,532
100	9	0000-9708	Contribution to Capital Project Fund	11,300,532	6,185,000		17,485,532
			Budget County PayGo Projects Funded by CIF				
380	6	1952-6932-DM	Contribution From CIF		700,000		700,000
380	6	2110-6932-DM	Contribution From CIF		500,000		500,000
380	6	1940-6932-DM	Contribution From CIF		1,300,000		1,300,000
380	9	1952-9501-DM	Building and Ground Maintenance - DM		700,000		700,000
380	9	2110-9501-DM	Building and Ground Maintenance - DM		500,000		500,000
380	9	1940-9501-DM	Building and Ground Maintenance - DM		1,300,000		1,300,000
			Budget County's Deferred Maintenance Projects				
380	6	5610-6927-HSC	Proceeds from 2024 Draw Program	-	62,115,000		62,115,000
380	9	5610-9826-HSC	Building Acquisition		42,000,000		
380	9	5610-9606-HSC	Engineering		2,000,000		2,000,000
380	9	5610-9820-HSC	Construction		18,115,000		18,115,000
			Budget Human Services Facility				
380	6	2710-6927-PSTC	Proceeds from 2024 Draw Program	-	35,000,000		35,000,000
380	9	2710-9820-PSTC	Construction	-	35,000,000		35,000,000

			Budget Public Safety Training Facility				
390	6	7230-6927-FLW	Proceeds from 2024 Draw Program	-	12,000,000		12,000,000
390	9	7230-9820-FLW	Construction	-	12,000,000		12,000,000
			Budget Fred L. Wilson Elementary School Addition				
390	6	7230-6927-FPEAC	Proceeds from 2024 Draw Program	-	7,000,000		7,000,000
390	9	7230-9821-FPEAC	Building and Renovations	-	7,000,000		7,000,000
			Budget Forest Park Elementary School HVAC				
390	6	7240-6927-SCAC	Proceeds from 2024 Draw Program	-	5,335,000		5,335,000
390	9	7240-9821-SCAC	Building and Renovations	-	5,335,000		5,335,000
			Budget HVAC Replacement RCCC South Campus				
390	6	7210-6927-MFWRV	Proceeds from 2024 Draw Program	-	11,000,000		11,000,000
390	9	7210-9830-MFWRV	Other Improvements	-	11,000,000	-	11,000,000
			Budget Mary Frances Wall Renovations				
390	6	7210-6927-WHVAC	Proceeds from 2024 Draw Program	-	7,000,000		7,000,000
390	9	7210-9821-WHVAC	Building and Renovations	-	7,000,000		7,000,000
			Budget Weddington Hills E.S. HVAC Replacement				
390	6	7210-6927-CHVAC	Proceeds from 2024 Draw Program	-	9,000,000	-	9,000,000
390	9	7210-9821-CHVAC	Building and Renovations	-	9,000,000		9,000,000
			Budget Concord H.S. HVAC Replacement				-
390	6	7210-6927-OPPOR	Proceeds from 2024 Draw Program	-	7,000,000		7,000,000
390	9	7210-9820-OPPOR	Construction	-	7,000,000		7,000,000
			Budget for Opportunity School				
390	6	7210-6927-HRROF	Proceeds from 2024 Draw Program	-	2,550,000		2,550,000
390	9	7210-9830-HRROF	Other Improvements	-	2,550,000		2,550,000
			Budget Hickory Ridge H.S. Roof Replacement				
390	6	7210-6927-CMROF	Proceeds from 2024 Draw Program	-	2,500,000		2,500,000
390	9	7210-9830-CMROF	Other Improvements	-	2,500,000		2,500,000
			Budget Cox Mill E.S. Roof Replacement				
390	6	7210-6927-WMROF	Proceeds from 2024 Draw Program	-	2,000,000		2,000,000
390	9	7210-9830-WMROF	Other Improvements	-	2,000,000		2,000,000
			Budget Wolf Meadow E.S. Roof Replacement				

Budget Officer

☐ Approved
☐ Denied

_____
Signature

_____
Date

County Manager

☐ Approved
☐ Denied

_____
Signature

_____
Date

Board of Commissioners

☐ Approved
☐ Denied

_____
Signature

_____
Date

Fiscal Year 2024 PayGo, and Capital Projects

Fiscal Year 2024 PayGo Projects and County Deferred Maintenance Projects (funded by Community Investment Fund)

- Cabarrus County Schools
  - $5,400,532 – Cabarrus County Schools Deferred Maintenance
  - $1,500,000 – Central Cabarrus Track
  - $1,700,000 - Hickory Ridge High School Football Field and Track
  - $1,200,000 - Cox Mills, Central Cabarrus & Northwest Tennis Courts
- Kannapolis City Schools
  - $1,500,000 – Kannapolis City Schools Deferred Maintenance
- Cabarrus County
  - $85,000 – Boardwalk Vietnam Veterans Park
  - $1,100,000 – Frank Liske Park Mini-Golf and Office Project
  - $1,000,000 – Replace Chiller at Sheriff's Administration Building
  - $935,000 – Compactor at Landfill
  - $4,000,000 – Land Acquisition
  - $2,500,000 – Deferred Maintenance

Fiscal Year 2024 Capital Projects (funded by 2024 Draw Program)

- Cabarrus County Schools
  - $11,000,000 - Mary Frances Wall Renovations (Currently R. Brown McAllister ES)
  - $7,000,000 – Weddington Hills Elementary School HVAC
  - $9,000,000 – Concord High School HVAC
  - $7,000,000 – Opportunity School
  - $2,550,000 – Hickory Ridge High School Roof
  - $2,500,000 – Cox Mill Elementary School Roof
  - $2,000,000 – Wolf Meadow Elementary School Roof
- Kannapolis City Schools
  - $12,000,000 – Fred L. Wilson Elementary School Addition
  - $7,000,000 - Forest Park Elementary School HVAC
- Rowan Cabarrus Community College
  - $5,335,000 - South Campus HVAC
- Cabarrus County
  - $62,115,000 – Human Services Facility Design, Renovation and Construction
  - $35,000,000 – Public Safety Training Facility

CABARRUS COUNTY
COUNTY 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 County 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.

Debt Proceeds 2020 Draw Note	$ 60,904,154
Debt Proceeds 2022 Draw Note	103,458,267
Debt Proceeds 2024 Debt Program	131,269,664
Debt Proceeds 2026 Debt Program	10,500,000
Contributions from Capital Projects Fund	24,696,943
Contribution from General Fund	40,091,315
Contribution from Capital Reserve Fund	2,728,681
Contribution from Internal Service Fund	1,065,426
Contribution from Community Investment Fund	27,078,328
State Allocation	40,700,000
PARTF Grant	500,000
TOTAL REVENUES	**$442,992,778**

C. The following appropriations are made as listed.

Courthouse Site Enabling Construction & Renovation	$ 146,545,280
Exterior Repairs to Multiple Buildings	326,174
Contribution to Capital Reserve (Reimb for Skylight Project)	2,085,000
West Cabarrus High School Artificial Turf Fields	2,566,810
Frank Liske Barn Replacement	7,033,845
Legal / Closing Expenses	952,508
Emergency Equipment Warehouse/ ITS Location	15,867,999
Fiber Infrastructure Improvement	799,000
Sheriff Training & Firing Range Renovations	2,200,000
Human Services HVAC	180,000
Frank Liske Park ADA Renovations	1,450,000
Frank Liske Park Playground Replacement	203,600
Camp Spencer Vending & Archery Building	536,998
West Cabarrus Library & Senior Center	30,400,000
Deferred Maintenance Projects	11,871,450
EMS Headquarters	21,007,999
Mt. Pleasant Library / ALC / Foil Park Project	26,500,000
Northeast Area Land	4,729,117
Mental Health Facility	35,597,554
Other Improvements Unallocated	1,632,642
Enterprise Physical Security Project (ITS)	807,000

Concord Senior Center Overflow Parking Lot	550,000
Contribution to the General Fund	47,500
Frank Liske Park Softball Complex Utilities	410,000
Rob Wallace Park	1,533,504
Animal Shelter Expansion	275,000
Frank Liske Park Stormwater Project	570,803
Northeast Cabarrus Radio Tower Project	2,439,172
Milestone Building	8,150,000
Fire Services Building	370,000
Frank Liske Park Tennis Court	280,000
Frank Liske Park Multiple Projects	5,000,000
Government Center Building Repair	450,000
Public Safety Training Center	37,073,823
Human Services Facility	66,365,000
Frank Liske Park Mini-Golf and Office	1,100,000
Boardwalk at Vietnam Veterans Park	85,000
Land Acquisition	4,000,000
Chiller Replacement at Sheriff's Admin Office	1,000,000
TOTAL EXPENDITURES	**$442,992,778**
GRAND TOTAL – REVENUES	**$442,992,778**
GRAND TOTAL – EXPENDITURES	**$442,992,778**

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. Transfers amounts between objects of expenditure and revenues within a function without limitation.

2. Transfer amounts up to $500,000 between functions of the same fund.

3. 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. 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.

5. 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.

6. 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.

7. Reject formal bids when deemed appropriate and in the best interest of Cabarrus County pursuant to G.S. 143-129(a).

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.

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 Community Investment Fund and the portion of the Capital Project associated with the project is closed.

Adopted this 19th day of June 2023.

CABARRUS COUNTY BOARD OF COMMISSIONERS

BY: _____
Stephen M. Morris, Chairman

ATTEST:

_____
Clerk to the Board

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	$ 47,055,342
Contribution from Capital Projects Fund	9,383,614
Debt Proceeds 2020 Draw Note	45,227,096
Debt Proceeds 2022 Draw Note	57,105,056
Debt Proceeds 2024 Draw Note	71,466,750
Contribution from Capital Reserve Fund	693,429
Contribution from Convention & Visitors Bureau	1,550,000
NC Department of Transportation	1,950,000
TOTAL REVENUES	**$234,431,287**

C. The following appropriations are made as listed.

CCS Mobile Unit Renovation	$ 3,300,000
R. Brown McAllister Replacement	48,356,750
Roberta Road Middle School	56,604,300
CCS New High School	9,508,821
CCS Southeast High School – Land purchase	1,816,320
Contribution to Capital Reserve	5,001,114
Early College Mobile Units	2,536,331
Mondo Track – JM Robinson High School	1,550,000
Deferred Maintenance Cabarrus County Schools	24,864,617
Deferred Maintenance Kannapolis City School	5,640,034
Deferred Maintenance Rowan Cabarrus Community College	3,468,000
Central Cabarrus Track	1,500,000
Hickory Ridge Football Field and Track	1,700,000
Tennis Courts – Cox Mill, Central Cabarrus, Northwest	1,200,000
Mary Frances Wall Renovations	11,000,000
Weddington Hills Elementary School HVAC	7,000,000
Concord High School HVAC	9,000,000
Opportunity School	7,000,000
Hickory Ridge High School Roof	2,550,000
Cox Mill Elementary School Roof	2,500,000
Wolf Meadow Elementary School Roof	2,000,000
Fred L. Wilson Elementary School Addition	12,000,000

Forest Park Elementary School HVAC	7,000,000
RCCC South Campus HVAC	5,335,000
Cabarrus Health Science Institution	2,000,000
TOTAL EXPENDITURES	**$234,431,287**
GRAND TOTAL – REVENUES	**$234,431,287**
GRAND TOTAL – EXPENDITURES	**$234,431,287**

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.

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 19th Day of June 2023.

CABARRUS COUNTY BOARD OF COMMISSIONERS

BY: _____
Stephen M. Morris, Chairman

ATTEST:

_____
Clerk to the Board

RESOLUTION DECLARING OFFICIAL INTENT TO REIMBURSE EXPENDITURES WITH PROCEEDS OF DEBT PURSUANT TO UNITED STATES DEPARTMENT OF TREASURY REGULATIONS

BE IT RESOLVED by the Board of Commissioners of Cabarrus County:

1. The Board hereby finds, determines and declares as follows:

(a) Treasury Regulations Section 1.150-2 (the "Regulations"), promulgated by the United States Department of Treasury on June 18, 1993, prescribes certain specific procedures applicable to certain obligations issued by the County after June 30, 1993, including, without limitation, a requirement that the County timely declare its official intent to reimburse certain expenditures with the proceeds of debt to be issued thereafter by the County.

(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Concord High School HVAC Replacement").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Concord High School HVAC Replacement is expected to be $9,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Concord High School HVAC Replacement was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

I DO HEREBY FURTHER CERTIFY that the schedule of regular meetings of said Board of Commissioners has been on file in my office pursuant to North Carolina General Statutes §143-318.12 as of a date not less than seven (7) days before said meeting.

WITNESS my hand and the corporate seal of said County, this 19th day of June 2023.

_____
Clerk to the Board of Commissioners
for the County of Cabarrus, North Carolina

[SEAL]

RESOLUTION DECLARING OFFICIAL INTENT TO REIMBURSE EXPENDITURES WITH PROCEEDS OF DEBT PURSUANT TO UNITED STATES DEPARTMENT OF TREASURY REGULATIONS

BE IT RESOLVED by the Board of Commissioners of Cabarrus County:

1. The Board hereby finds, determines and declares as follows:

(a) Treasury Regulations Section 1.150-2 (the "Regulations"), promulgated by the United States Department of Treasury on June 18, 1993, prescribes certain specific procedures applicable to certain obligations issued by the County after June 30, 1993, including, without limitation, a requirement that the County timely declare its official intent to reimburse certain expenditures with the proceeds of debt to be issued thereafter by the County.

(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Cox Mill Elementary School Roof Replacement").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Cox Mill Elementary School Roof Replacement is expected to be $2,500,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Cox Mill Elementary School Roof Replacement was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

I DO HEREBY FURTHER CERTIFY that the schedule of regular meetings of said Board of Commissioners has been on file in my office pursuant to North Carolina General Statutes §143-318.12 as of a date not less than seven (7) days before said meeting.

WITNESS my hand and the corporate seal of said County, this 19th day of June 2023.

_____
Clerk to the Board of Commissioners
for the County of Cabarrus, North Carolina

[SEAL]

RESOLUTION DECLARING OFFICIAL INTENT TO REIMBURSE EXPENDITURES WITH PROCEEDS OF DEBT PURSUANT TO UNITED STATES DEPARTMENT OF TREASURY REGULATIONS

BE IT RESOLVED by the Board of Commissioners of Cabarrus County:

1. The Board hereby finds, determines and declares as follows:

(a) Treasury Regulations Section 1.150-2 (the "Regulations"), promulgated by the United States Department of Treasury on June 18, 1993, prescribes certain specific procedures applicable to certain obligations issued by the County after June 30, 1993, including, without limitation, a requirement that the County timely declare its official intent to reimburse certain expenditures with the proceeds of debt to be issued thereafter by the County.

(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Forest Park Elementary School HVAC Replacement").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Forest Park Elementary School HVAC Replacement is expected to be $7,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Forest Park Elementary School HVAC Replacement was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

I DO HEREBY FURTHER CERTIFY that the schedule of regular meetings of said Board of Commissioners has been on file in my office pursuant to North Carolina General Statutes §143-318.12 as of a date not less than seven (7) days before said meeting.

WITNESS my hand and the corporate seal of said County, this 19th day of June 2023.

_____
Clerk to the Board of Commissioners
for the County of Cabarrus, North Carolina

[SEAL]

RESOLUTION DECLARING OFFICIAL INTENT TO REIMBURSE EXPENDITURES WITH PROCEEDS OF DEBT PURSUANT TO UNITED STATES DEPARTMENT OF TREASURY REGULATIONS

BE IT RESOLVED by the Board of Commissioners of Cabarrus County:

1. The Board hereby finds, determines and declares as follows:

(a) Treasury Regulations Section 1.150-2 (the "Regulations"), promulgated by the United States Department of Treasury on June 18, 1993, prescribes certain specific procedures applicable to certain obligations issued by the County after June 30, 1993, including, without limitation, a requirement that the County timely declare its official intent to reimburse certain expenditures with the proceeds of debt to be issued thereafter by the County.

(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Fred L. Wilson Elementary School Addition").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Fred L. Wilson Elementary School Addition is expected to be $12,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Fred L. Wilson Elementary School Addition was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

I DO HEREBY FURTHER CERTIFY that the schedule of regular meetings of said Board of Commissioners has been on file in my office pursuant to North Carolina General Statutes §143-318.12 as of a date not less than seven (7) days before said meeting.

WITNESS my hand and the corporate seal of said County, this 19th day of June 2023.

_____
Clerk to the Board of Commissioners
for the County of Cabarrus, North Carolina

[SEAL]

RESOLUTION DECLARING OFFICIAL INTENT TO REIMBURSE EXPENDITURES WITH PROCEEDS OF DEBT PURSUANT TO UNITED STATES DEPARTMENT OF TREASURY REGULATIONS

BE IT RESOLVED by the Board of Commissioners of Cabarrus County:

1. The Board hereby finds, determines and declares as follows:

(a) Treasury Regulations Section 1.150-2 (the "Regulations"), promulgated by the United States Department of Treasury on June 18, 1993, prescribes certain specific procedures applicable to certain obligations issued by the County after June 30, 1993, including, without limitation, a requirement that the County timely declare its official intent to reimburse certain expenditures with the proceeds of debt to be issued thereafter by the County.

(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Hickory Ridge High School Roof Replacement").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Hickory Ridge High School Roof Replacement is expected to be $2,550,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Hickory Ridge High School Roof Replacement was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

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Clerk to the Board of Commissioners
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[SEAL]

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(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Human Services Facility").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Human Services Facility is expected to be $62,115,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Human Services Facility was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

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[SEAL]

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BE IT RESOLVED by the Board of Commissioners of Cabarrus County:

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(a) Treasury Regulations Section 1.150-2 (the "Regulations"), promulgated by the United States Department of Treasury on June 18, 1993, prescribes certain specific procedures applicable to certain obligations issued by the County after June 30, 1993, including, without limitation, a requirement that the County timely declare its official intent to reimburse certain expenditures with the proceeds of debt to be issued thereafter by the County.

(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Mary Frances Wall Renovation").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Mary Frances Wall Renovation is expected to be $11,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Mary Frances Wall Renovation was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

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(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Opportunity School").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Opportunity School is expected to be $7,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Opportunity School was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

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(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Public Safety Training Facility is expected to be $35,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Public Safety Training Facility was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

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(b) The County has advanced and/or will advance its own funds to pay certain capital costs (the "Original Expenditures") associated with financing, in whole or in part, (i) the design, acquisition, construction, installation and equipping of a new public park facility, including the acquisition of necessary land, easements and rights-of-way, (ii) site development, (iii) any and all related utilities relocation and (iv) various real and/or personal property improvements related to any of the foregoing (collectively, the "Rowan Cabarrus Community College "RCCC" South Campus HVAC Replacement").

(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the RCCC South Campus HVAC Replacement is expected to be $5,335,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the RCCC South Campus HVAC Replacement was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

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(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Weddington Hills Elementary School HVAC Replacement is expected to be $7,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Weddington Hills Elementary School HVAC Replacement was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

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I, Lauren Linker, Clerk to the Board of Commissioners for the County of Cabarrus, North Carolina, DO HEREBY CERTIFY that the foregoing is a true copy of so much of the proceedings of said Board of Commissioners at a regular meeting held on June 19, 2023, as relates in any way to the passage of the resolutions hereinabove referenced, and that said proceedings are recorded in Minute Book No. [__] of the minutes of said Board of Commissioners, beginning at page ___ and ending at page ___.

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(c) The funds heretofore advanced or to be advanced by the County to pay the Original Expenditures are or will be available only on a temporary basis, and do not consist of funds that were otherwise earmarked or intended to be used by the County to permanently finance the Original Expenditures.

(d) As of the date hereof, the County reasonably expects that it will reimburse itself for such Original Expenditures with the proceeds of debt to be incurred by the County, and the maximum principal amount of debt to be incurred with respect to the Wolf Meadow Elementary School Roof Replacement is expected to be $2,000,000.

(e) All Original Expenditures to be reimbursed by the County were paid no more than 60 days prior to or will be paid on or after the date of, this declaration of official intent. The County understands that such reimbursement must occur not later than 18 months after the later of (i) the date the Original Expenditure was paid; or (ii) the date the Wolf Meadow Elementary School Roof Replacement was placed in service or abandoned, but in no event more than 3 years after the Original Expenditure was paid.

2. This resolution shall take effect immediately.

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WITNESS my hand and the corporate seal of said County, this 19th day of June 2023.

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Clerk to the Board of Commissioners
for the County of Cabarrus, North Carolina

[SEAL]

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Old Business

SUBJECT:
Human Resources - Personnel Ordinance Update

BRIEF SUMMARY:
Updates to reflect a new longevity bonus program for county employees with greater than 5 years of service. This language will replace the existing Ordinance section that ended the former longevity program July 1, 1993.

REQUESTED ACTION:
Motion to approve Personnel Ordinance changes.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Lundee Covington, HR Director

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Personnel Ordinance Updates

- 25+ Personnel Ordinance Updates

Cabarrus County Personnel Ordinance

Requesting New Language to replace the current language below from the former plan that was discontinued in July 1993.

Article III. The Pay Plan

Section 11. Longevity Pay Plan **PROPOSED**

The Cabarrus County Longevity Pay enhances employee retention by providing payments to eligible employees. Permanent full-time and part-time employees become eligible with at least five years of continuous (uninterrupted) service with Cabarrus County. The eligibility date utilized for this program is an effective date on or before October 1 of each year, meaning years of service as of that date will be utilized based on the schedule below. Years of service are based on the employee's most recent date of hire into an eligible position. Longevity payments will be made annually prior to the end of the calendar year to those still employed at the date of the payout.

Full-Time Schedule

Years of Service	Annual Amount
5 to less than 10 years of service	**$750**
10 to less than 15 years of service	**$1,000**
15 to less than 20 years of service	**$1,500**
20 to less than 25 years of service	**$2,000**
25+ years of service	**$2,500**

Part-Time Schedule (9102, 9103, Cooperative Extension)

Years of Service	Annual Amount
5 to less than 10 years of service	**$375**
10 to less than 15 years of service	**$500**
15 to less than 20 years of service	**$750**
20 to less than 25 years of service	**$1,000**
25+ years of service	**$1,250**

Current Language:

Section 11. Longevity Pay Plan

The Cabarrus County Longevity Pay Plan was discontinued on July 1, 1993. Each permanent full time employee receiving this benefit prior to this date will continue to do so. This "grandfathered" benefit will be paid in the biweekly pay checks, at an amount equal to that which was in effect on June 30, 1993. Recipients will lose this benefit when changing from regular full time to regular part time employment status or upon separation from employment with Cabarrus County. Once longevity pay is terminated it will not be reinstated.

Longevity - The original request is attached.
Employees currently earning > $150,000
7 employees, 6 eligible for longevity
The annual cost for this group at original tiers = $9,500

Adding in new tiers:

Full-Time Schedule

Years of Service	Annual Amount
5 to less than 10 years of service	**$750**
10 to less than 15 years of service	**$1,000**
15 to less than 20 years of service	**$1,500**
20 to less than 25 years of service	**$2,000**
25 to less than 30 years of service	**$2,500**
30 to less than 35 years of service	**$3,000**
35+ years of service	**$3,500**

Part-Time Schedule (9102, 9103, Cooperative Extension)

Years of Service	Annual Amount
5 to less than 10 years of service	**$375**
10 to less than 15 years of service	**$500**
15 to less than 20 years of service	**$750**
20 to less than 25 years of service	**$1,000**
25 to less than 30 years of service	**$1,250**
30 to less than 35 years of service	**$1,500**
35+ years of service	**$1,750**

Incremental cost to add in the new tier is $7,500. This benefits 11 current full-time employees. There will be a few additional staff from Cooperative Extension at the ½ pay levels, but I do not have this information at this time.

Market Study for BOC Positions

This is the schedule that was approved at the Retreat. The BOC positions are part of the "all others" category. The positions were studied in FY23 but there was not recommendation for movement. They did look at the salary and the travel stipend. Prior to this study (presented in April 2023) this position was last studied in FY20 with data presented in May of 2019.

Review Cycle

	4 year cycle	2 year cycle
	Current	Recommended
Study Year	Department(s) Reviewed	
FY22	Public Safety (EMS, EM/Fire, Sheriff)	
FY23	All Others	
FY24	Human Services	Human Services/Pay Compression
FY25	Pay Compression (All)	Public Safety/All Others

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
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:

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
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	1	*
Adult Care Home Community Advisory Committee	13	**
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 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	n/a	*
Jury Commission	n/a	*

Juvenile Crime Prevention Council	n/a	*
Library Board of Trustees	n/a	*
Mental Health Advisory Board	1	*
Mt. Pleasant Planning Board & Board of Adjustment	n/a	
Nursing Home Community Advisory Board	11	**
Planning & Zoning Commission	1	*
Public Health Authority of Cabarrus County	n/a	*
Region F Aging Advisory Committee	2	*
Rowan-Cabarrus Community College Board of Trustees	n/a	*
Senior Centers Advisory Council	2	*
Tourism Authority	n/a	*
Transportation Advisory Board	6	*
Water & Sewer Authority of Cabarrus County	n/a	*
Youth Commission	9	Hickory Ridge, Jay M. Robinson, Mt. Pleasant, 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:

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.

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

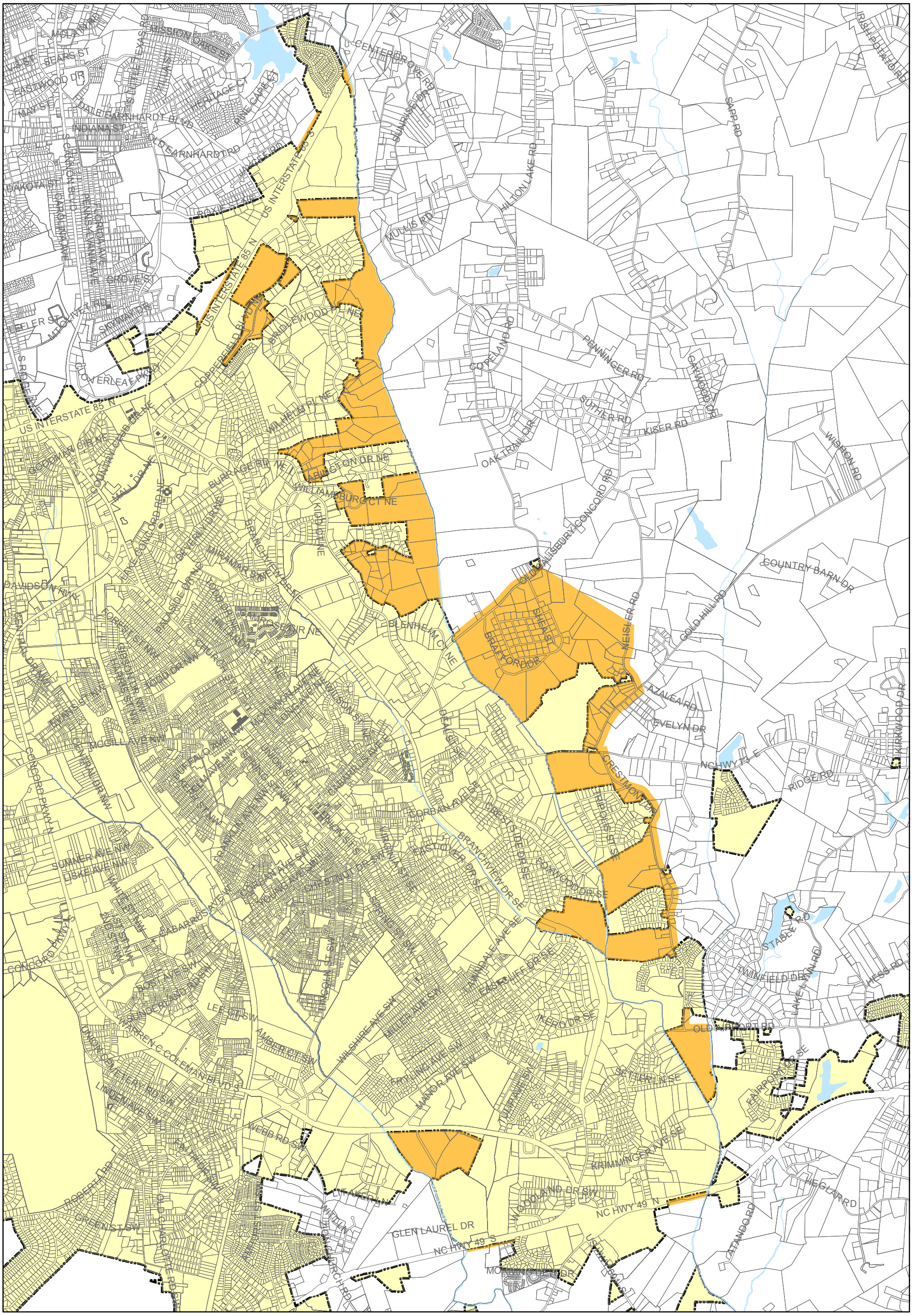
This board works to advance coordination between the County and human service agencies, to monitor transportation services and to advise the Board on issues related to human service transportation policy matters. Members include representatives from the Department of Social Services, Cabarrus Health 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

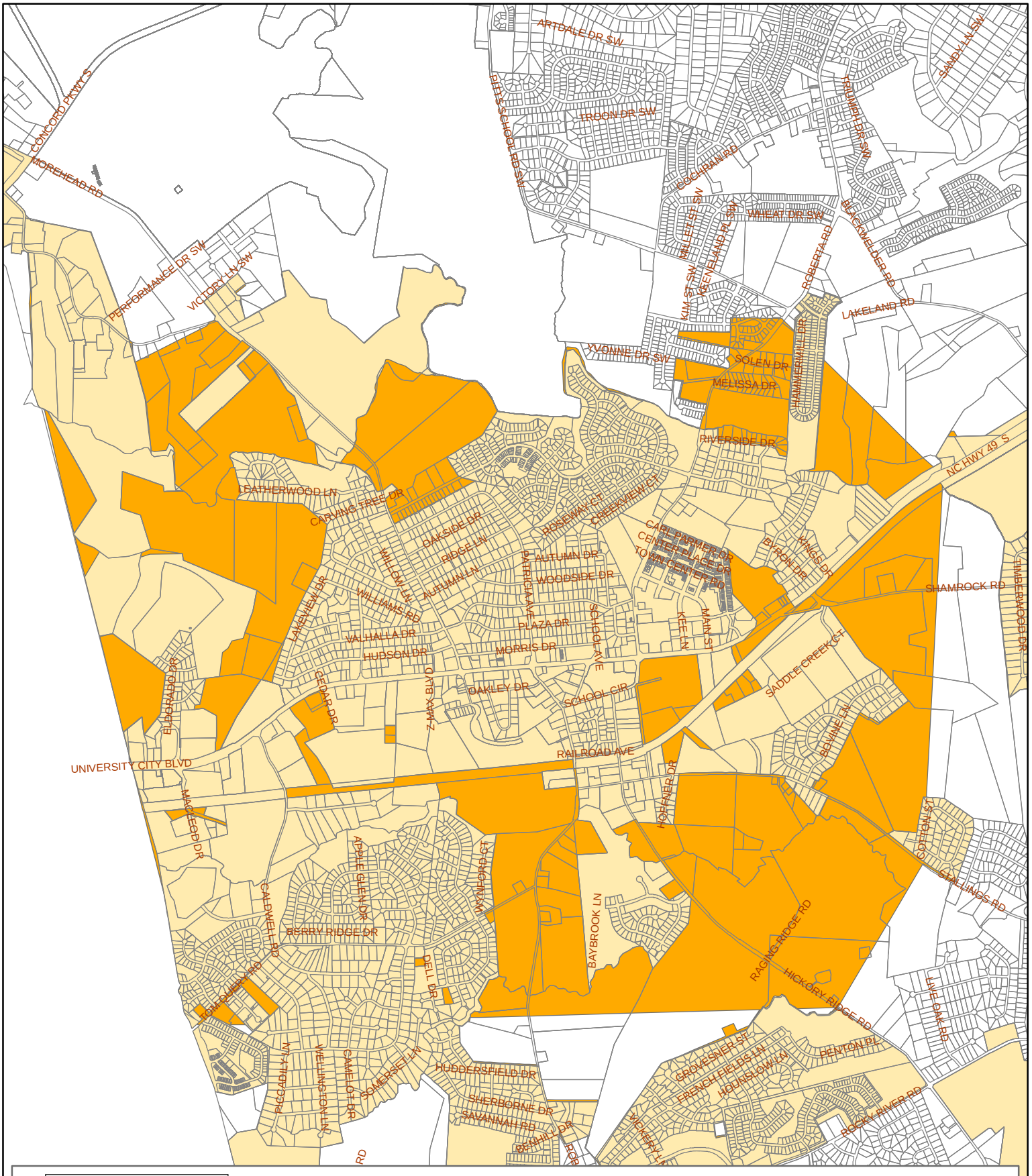
The purpose of the Youth Commission is to provide teens in the community an opportunity to be active citizens. Through experiences and education, youth will be empowered in the community. The Youth Commission will expose teens to county government, allow teens an opportunity to discuss issues, and interact with county commissioners and employees through youth-adult partnerships.



Concord NORTH CAROLINA

City of Concord
Extraterritorial Jurisdiction (ETJ)

Map created: 6-3-2009


ARTDALE DR SW
TROON DR SW
PELTS SCHOOL RD SW
SANDY LN SW
CONCORD PKWY S
MOREHEAD RD
PERFORMANCE DR SW
VICTORY LN SW
COCHRAN RD
WHEAT DR SW
WILLEFORD RD SW
KIMMETT SW
GENELAND PL SW
ROBERTA RD
BLACKWELDER RD
LAKELAND RD
YVONNE DR SW
SOLEN DR
MELISSA DR
RIVERSIDE DR
NC HWY 49 S
LEATHERWOOD LN
CARVING TREE DR
OAKSIDE DR
RIDGE LN
ROSEWAY CT
CREEKVIEW CT
CARL PALMER DR
CENTER PLACE DR
TOWN CENTER BLVD
BRONCO DR
KINGS ST DR
AUTUMN DR
AUTUMN LN
WOODSIDE DR
PATRICIA ANN PLAZA DR
WILLOW LN
WILLIAMS RD
LAKEVIEW DR
VALHALLA DR
HUDSON DR
MORRIS DR
SCHOOL CIR
MAIN ST
KEE LN
SHAMROCK RD
TIMBERWOOD DR
SADDLE CREEK CT
BOWNE LN
ELDORADO DR
CEDAR DR
ORTEGA WAY
OAKLEY DR
RAILROAD AVE
UNIVERSITY CITY BLVD
MAGEE RD
HOPPER DR
LOTHIAN ST
SEALINGS RD
APPLE GLEN DR
CALDWELL RD
BERRY RIDGE DR
WYNDHAM ST
BAYBROOK LN
RAGING RIDGE RD
HICKORY RIDGE RD
LAKE OAK RD
DELL DR
HOMEDEAN RD
KATHY TRACY
WELLINGTON LN
CAMELOT DR
SOMERSET LN
HUDDERSFIELD DR
GROVESNER ST
FRENCH FIELDS LN
HOUNSLOW LN
DENTON PL
SHERBORNE DR
SAVANNAH RD
ROCKY RIVER RD
Legend
Tax Parcels
Harrisburg Municipal Limits
Harrisburg ETJ Boundary
Miles
0
0.2
0.4
0.8
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 19, 2023
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 2022-2023.

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:

ATTACHMENTS:

- Budget Amendment Report

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110086	BUA	05/02/2023	05/02/2023	naturalgassnpolitis		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9411		1910	naturalgas		natural gas Natural Gas		50,000.00	
2	00191950	9411		1910	naturalgas		natural gas Natural Gas	60,000.00		
3	00191950	9412		1910	naturalgas		natural gas Power		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
2023	11	110112	BUA	05/03/2023	05/03/2023	Med Cons	mnxiong	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195630	9445		5630	9653		Move to 5630-9653 Purchased Services		12,000.00	
2	00195630	9653		5630	9653		Move from 5630-9445 Medical Consultants	12,000.00		
							** 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
2023	11	110189	BUA	05/05/2023	05/05/2023	One Time	blconrad	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9860	BOMB	2110	One Time P	T	One Time to correct Accoun Equipment & Furniture	26,000.00		
2	00192110	9860		2110	One Time P	T	One Time to correct Accoun Equipment & Furniture		26,000.00	
3	00192110	9331		2110	One Time P	T	One Time to correct Accoun Minor Office Equipment & Furn	14,000.00		
4	00192110	9860		2110	One Time P	T	One Time to correct Accoun Equipment & Furniture		14,000.00	
5	00192145	9863		2110	One Time P	T	One Time to correct Accoun Motor Vehicles	70,000.00		
6	00192110	9863		2110	One Time P	T	One Time to correct Accoun Motor Vehicles		70,000.00	
							** 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
2023	11	110197	BUA	05/08/2023	05/08/2023	CTRC EMPLO	srburgess	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191710	9605		FINANC	FINANCE	T	COVER CONTRACT EMPLOYEE FY Consultants		750.00	
2	00191710	9114		FINANC	FINANCE	T	COVER CONTRACT EMPLOYEE FY Contracted Employees	750.00		
							** 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
2023	11	110198	BUA	05/08/2023	05/08/2023	Bus cards	trligon	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192730	9320				T	 Printing & Binding		850.00	
2	00192730	9301				T	 Office Supplies	850.00		
							** 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
2023	11	110211	BUA	05/08/2023	05/08/2023	Nutrition	mnxiong	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195750	9451		5750	9330		Move to 5750-9330 Host Agency Expenses		2,000.00	
2	00195750	9330		5750	9330		Move from 5750-9451 Tools & Minor Equipment	2,000.00		
							** 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
2023	11	110212	BUA	05/08/2023	05/08/2023	Trck Tires	kpgrant	1	N	Hist	2023	

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
2023	11	110212	BUA	05/08/2023	05/08/2023	Trck Tires	kpgrant	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094610	9501		4610	Trck Tires		Truck Tires		7,500.00	
							Buildings & Grounds Maintenanc			
2	27094610	9520		4610	Trck Tires		Truck Tires	7,500.00		
							Autos & Trucks Maintenance			
							** 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
2023	11	110216	BUA	05/08/2023	05/08/2023	HSA HRA	srburgess	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	61091917	948501		FINANC	FINANCE	T	MOVE TO COVER HRA ACCOUNT		3,000.00	
							Admin - HSA Origination Fee			
2	61091917	948502		FINANC	FINANCE	T	MOVE TO COVER HRA ACCOUNT	3,000.00		
							HRA Account			
							** 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
2023	11	110272	BUA	05/09/2023	05/09/2023	CVR RENT	srburgess	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	61091917	9401		FINANC	FINANCE	T	COVER RENTAL JUNE PAYMENT	6.00		
							Building and Equipment Rentals			
2	61091917	948501		FINANC	FINANCE	T	COVER RENTAL JUNE PAYMENT		6.00	
							Admin - HSA Origination Fee			
							** 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
2023	11	110296	BUA	05/10/2023	05/10/2023	Uniforms	ddgustafson	1	N	Hist	2023	

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
2023	11	110296	BUA	05/10/2023	05/10/2023	Uniforms	ddgustafson	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192710	9610		2710	Uniforms		Travel		1,500.00	
2	00192715	9340		2710	Uniforms		Uniforms	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
2023	11	110381	BUA	05/12/2023	05/12/2023	HCCBG	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00165760	6301		5760	HCCBG		to match adjusted budget HCCBG - Adult Day Services		33,387.00	
2	00195760	9444		5760	HCCBG		to match adjusted budget Adult Day Services	33,387.00		
3	00165240	6223	HCCBG	5760	HCCBG		to match adjusted budget Transportation Grant	33,387.00		
4	00195240	9520		5760	HCCBG		to match adjusted budget Autos & Trucks Maintenance		33,387.00	
							** 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
2023	11	110385	BUA	05/15/2023	05/15/2023	Postage	mjtardugno	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191953	9445		1953	Postage		Postage Purchased Services		9,000.00	
2	00191953	9325		1953	Postage		Postage Postage	9,000.00		
							** 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
2023	11	110430	BUA	05/16/2023	05/16/2023	HHIHR	lcruse	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00193250	9493	HHI	3250	HHIHR		Reallocate to HHIHR Operations-HHI		4,000.00	
2	00193250	9493	HHIHR	3250	HHIHR		To cover projected expense Operations	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
2023	11	110459	BUA	05/16/2023	05/16/2023	F-5	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00161910	6445		BOC	F-5		school one time expend Medicaid Hold Harmless		1,704,519.00	
2	00197110	970111		BOC	F-5		school one time expend Regular Instructional Services	1,337,292.00		
3	00197110	970124		BOC	F-5		school one time expend Technology Support Serv	183,465.00		
4	00197130	970111		BOC	F-5		school one time expend Regular Instructional Services	183,762.00		
5	00191910	9660		BOC	F-5		school one time expend Contingency		132,399.00	
6	00197110	970117		BOC	F-5		school one time expend Charter Schools	118,089.00		
7	00197130	970117		BOC	F-5		school one time expend Charter Schools	14,310.00		
8	001	5704		BOC	F-5		 Appropriations		1,704,519.00	1
9	001	5703		BOC	F-5		 Estimated Revenues	1,704,519.00		1
							** JOURNAL TOTAL	1,704,519.00	1,704,519.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110462	BUA	05/16/2023	05/16/2023	F-6	snpolitis	1	N	Hist	2023	

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
2023	11	110462	BUA	05/16/2023	05/16/2023	F-6	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195615	946001	LIWAP	BOC	F-6		funding authorized from st Low Income Energt Asst program	30,000.00		
2	00165615	6204	LIWAP	BOC	F-6		funding authorized from st Soc Service Admin Reimb		30,000.00	
3	001	5704		BOC	F-6		 Appropriations		30,000.00	1
4	001	5703		BOC	F-6		 Estimated Revenues	30,000.00		1
							** JOURNAL TOTAL	30,000.00	30,000.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110475	BUA	05/16/2023	05/16/2023	F-8	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	44061925	6384	CARES	BOC	F-8		close GL accounts with CAR Cares Act Relief Payment	7,972,670.00		
2	44061925	6701		BOC	F-8		close GL accounts with CAR Interest on Investments	3,498.70		
3	44091925	9101		BOC	F-8		close GL accounts with CAR Salaries & Wages		3,505,856.98	
4	44091925	9202		BOC	F-8		close GL accounts with CAR Medicare		2,736.76	
5	44091925	9205		BOC	F-8		close GL accounts with CAR Group Hospital Insurance		24,935.22	
6	44091925	9206		BOC	F-8		close GL accounts with CAR Vision Care		56.76	
7	44091925	9207		BOC	F-8		close GL accounts with CAR Life Insurance		89.10	
8	44091925	9210		BOC	F-8		close GL accounts with CAR Retirement		18,307.94	
9	44091925	9230		BOC	F-8		close GL accounts with CAR Workers' Compensation		4,001.31	
10	44091925	9235		BOC	F-8		close GL accounts with CAR Deferred Compensation 401k		9,437.07	
11	44091925	931501		BOC	F-8		close GL accounts with CAR Health & Safety Materials		248,794.81	
12	44091925	9342		BOC	F-8		close GL accounts with CAR Minor Technology Equipment		519,725.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110475	BUA	05/16/2023	05/16/2023	F-8	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
13	44091925	942001		BOC	F-8		close GL accounts with CAR Telecommunications		17,666.57	
14	44091925	9445		BOC	F-8		close GL accounts with CAR Purchased Services		28,334.10	
15	44091925	946101	CARES	BOC	F-8		close GL accounts with CAR Emergency Assistance		24,982.95	
16	44091925	9640		BOC	F-8		close GL accounts with CAR Insurance & Bonds		4,152.33	
17	44091925	964102		BOC	F-8		close GL accounts with CAR Covid Health Claims		106,791.41	
18	44091925	970142		BOC	F-8		close GL accounts with CAR City of Kannapolis		524,531.94	
19	44091925	970143		BOC	F-8		close GL accounts with CAR Town of Harrisburg		175,244.87	
20	44091925	970144		BOC	F-8		close GL accounts with CAR Town of Mt. Pleasant		17,209.32	
21	44091925	970145		BOC	F-8		close GL accounts with CAR Town of Locust		4,869.99	
22	44091925	970146		BOC	F-8		close GL accounts with CAR Town of Midland		5,915.38	
23	44091925	9703		BOC	F-8		close GL accounts with CAR City of Concord		1,252,112.42	
24	44091925	9860		BOC	F-8		close GL accounts with CAR Equipment & Furniture		268,714.50	
25	44091925	9705	NURSE	BOC	F-8		close GL accounts with CAR Public Health Authority		1,200,000.00	
26	44091925	9201		BOC	F-8		close GL accounts with CAR Social Security		11,701.97	
27	440	5704		BOC	F-8		Appropriations	7,976,168.70		1
28	440	5703		BOC	F-8		Estimated Revenues		7,976,168.70	1
							** JOURNAL TOTAL	7,976,168.70	7,976,168.70	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110480	BUA	05/16/2023	05/16/2023	F-9	snpolitis	1	N	Hist	2023	

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
2023	11	110480	BUA	05/16/2023	05/16/2023	F-9	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	53260000	6805		BOC	F-9		adj to aging - spec rev fu Cont and Private Donations		1,426.00	
2	53260000	6701		BOC	F-9		adj to aging - spec rev fu Interest on Investments		3,521.00	
3	53290000	9358		BOC	F-9		adj to aging - spec rev fu Special Projects	4,947.00		
4	532	5704		BOC	F-9		 Appropriations		4,947.00	1
5	532	5703		BOC	F-9		 Estimated Revenues	4,947.00		1
							** JOURNAL TOTAL	4,947.00	4,947.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110481	BUA	05/16/2023	05/16/2023	F-11	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	32067210	6444	0617	BOC	F-11		lottery fund req from DPI Lottery Proceeds		272,149.00	
2	32097210	9702	0617	BOC	F-11		lottery fund req from DPI Kannapolis City Schools	272,149.00		
3	320	5704		BOC	F-11		 Appropriations		272,149.00	1
4	320	5703		BOC	F-11		 Estimated Revenues	272,149.00		1
							** JOURNAL TOTAL	272,149.00	272,149.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110482	BUA	05/16/2023	05/16/2023	F-10	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	32067210	6444		BOC	F-10		DPI lottery fund req for d Lottery Proceeds		2,300,000.00	
2	32097210	9704		BOC	F-10		DPI lottery fund req for d Contribution to General Fund	2,300,000.00		

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110482	BUA	05/16/2023	05/16/2023	F-10	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
3	320	5704		BOC	F-10				2,300,000.00	1
							Appropriations			
4	320	5703		BOC	F-10			2,300,000.00		1
							Estimated Revenues			
							** JOURNAL TOTAL	2,300,000.00	2,300,000.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110483	BUA	05/16/2023	05/16/2023	F-12	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	46162111	6305		BOC	F-12		adj rev/exp for sheriff fu		9,288.00	
							Federal Forfeiture Sharing			
2	46162111	6701		BOC	F-12		adj rev/exp for sheriff fu		394.00	
							Interest on Investments			
3	46192111	9836		BOC	F-12		adj rev/exp for sheriff fu	9,755.00		
							Forfeiture Sharing Expenses			
4	46162111	6305	TREAS	BOC	F-12		adj rev/exp for sheriff fu	2,804.00		
							Federal Forfeiture Sharing			
5	46162111	6701	TREAS	BOC	F-12		adj rev/exp for sheriff fu		931.00	
							Interest on Investments			
6	46192111	9836	TREAS	BOC	F-12		adj rev/exp for sheriff fu		1,946.00	
							Forfeiture Sharing Expenses			
7	46162112	6306		BOC	F-12		adj rev/exp for sheriff fu		56,260.00	
							NC Substance Control Tax			
8	46162112	6701		BOC	F-12		adj rev/exp for sheriff fu		1,788.00	
							Interest on Investments			
9	46192112	9838		BOC	F-12		adj rev/exp for sheriff fu	58,048.00		
							NC Control Substance Tax Expen			
10	46162114	6694		BOC	F-12		adj rev/exp for sheriff fu		1,109.00	
							Firing Range Revenues			
11	46162114	6701		BOC	F-12		adj rev/exp for sheriff fu		118.00	
							Interest on Investments			
12	46192114	9572		BOC	F-12		adj rev/exp for sheriff fu	1,227.00		
							Range Maintenance/Repair			
13	461	5704		BOC	F-12				67,084.00	1
							Appropriations			
14	461	5703		BOC	F-12			67,084.00		1
							Estimated Revenues			
							** JOURNAL TOTAL	67,084.00	67,084.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110484	BUA	05/16/2023	05/16/2023	F-13	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	46060000	6023		BOC	F-13		adj to sm proj fund Deferred Tax Collections		257,620.00	
2	46060000	602301		BOC	F-13		adj to sm proj fund Deferred Tax Coll-Prior Years		14,354.00	
3	46060000	6024		BOC	F-13		adj to sm proj fund Deferred Tax Interest		37,720.00	
4	46060000	661401		BOC	F-13		adj to sm proj fund Lease of Land Revenue		7,500.00	
5	46060000	6701		BOC	F-13		adj to sm proj fund Interest on Investments		32,367.00	
6	46090000	9830		BOC	F-13		adj to sm proj fund Other Improvements	349,561.00		
7	46061610	6501	0258	BOC	F-13		adj to sm proj fund Register of Deeds Fees		111,942.00	
8	46061610	6701		BOC	F-13		adj to sm proj fund Interest on Investments		7,666.00	
9	46091610	9407		BOC	F-13		adj to sm proj fund Automation & Enhancement Pres	119,608.00		
10	46063270	6606	DRILL	BOC	F-13		adj to sm proj fund Program Fees		1,468.00	
11	46093270	9419	DRILL	BOC	F-13		adj to sm proj fund Repairs and Maintenance	1,468.00		
12	460	5704		BOC	F-13		 Appropriations		470,637.00	1
13	460	5703		BOC	F-13		 Estimated Revenues	470,637.00		1
							** JOURNAL TOTAL	470,637.00	470,637.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110486	BUA	05/16/2023	05/16/2023	F-18	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00163250	6226	BCBS	BOC	F-18		allocate addtl BCBSHHI fun Home Improv Grant- BCBS		10,648.28	
2	00193250	9493	BCBS	BOC	F-18		allocate addtl BCBSHHI fun Operations - Healthy Home BCBS	10,648.28		
3	001	5704		BOC	F-18		 Appropriations		10,648.28	1

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110486	BUA	05/16/2023	05/16/2023	F-18	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
4	001	5703		BOC	F-18		Estimated Revenues	10,648.28		1
							** JOURNAL TOTAL	10,648.28	10,648.28	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110487	BUA	05/16/2023	05/16/2023	F-19	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	40162740	6901		BOC	F-19		Motorola CAD/RMS/JMS Fund Balance Appropriated		1,100,000.00	
2	40162740	6932		BOC	F-19		Motorola CAD/RMS/JMS Cont from Comm Investment Fund		756,964.00	
3	40192740	9860		BOC	F-19		Motorola CAD/RMS/JMS Equipment & Furniture	1,856,964.00		
4	10090000	9721		BOC	F-19		Motorola CAD/RMS/JMS Contrib to Special Revenue Fd	756,964.00		
5	10090000	9830	AVAIL	BOC	F-19		Motorola CAD/RMS/JMS Other Improvements		756,964.00	
6	00192110	9860		BOC	F-19		Motorola CAD/RMS/JMS Equipment & Furniture	1,136,694.00		
7	00161910	6932		BOC	F-19		Motorola CAD/RMS/JMS Cont from Comm Investment Fund		1,136,694.00	
8	10099120	9704		BOC	F-19		Motorola CAD/RMS/JMS Contribution to General Fund	1,136,694.00		
9	10090000	9830	AVAIL	BOC	F-19		Motorola CAD/RMS/JMS Other Improvements		1,136,694.00	
10	001	5704		BOC	F-19		Appropriations		1,136,694.00	1
11	401	5704		BOC	F-19		Appropriations		1,856,964.00	1
12	001	5703		BOC	F-19		Estimated Revenues	1,136,694.00		1
13	401	5703		BOC	F-19		Estimated Revenues	1,856,964.00		1
							** JOURNAL TOTAL	2,993,658.00	2,993,658.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110488	BUA	05/16/2023	05/16/2023	SRT: Nightblconrad		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9331		2110	SRT: Night	T	SRT: Night Vision Minor Office Equipment & Furn	65,000.00		
2	00192110	9860		2110	SRT: Night	T	SRT: Night Vision Equipment & Furniture		65,000.00	
							** 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
2023	11	110491	BUA	05/16/2023	05/16/2023	F-7	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	39097314	9830	MOBIL	BOC	F-7		close out fund 390, addtl Other Improvements		220.00	
2	39097407	9830	ADA	BOC	F-7		close out fund 390, addtl Other Improvements		2,691.00	
3	39097407	9830	ROOF	BOC	F-7		close out fund 390, addtl Other Improvements		22,263.00	
4	39067314	6902	MOBIL	BOC	F-7		close out fund 390, addtl Contribution From General Fund	220.00		
5	39067407	6921	ADA	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	2,691.00		
6	39067407	6921	ROOF	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	22,263.00		
7	39097306	9830	0467	BOC	F-7		close out fund 390, addtl Other Improvements		89,314.00	
8	39067306	6902	0467	BOC	F-7		close out fund 390, addtl Contribution From General Fund	89,314.00		
9	39097308	9830	0467	BOC	F-7		close out fund 390, addtl Other Improvements		89,314.00	
10	39067308	6921	0467	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	89,314.00		
11	39097314	9830	MOBIL	BOC	F-7		close out fund 390, addtl Other Improvements		80,975.00	
12	39067314	6902	MOBIL	BOC	F-7		close out fund 390, addtl Contribution From General Fund	80,975.00		
13	39097404	9820	KMS	BOC	F-7		close out fund 390, addtl Construction		138,897.00	
14	39067404	6910	KMS	BOC	F-7		close out fund 390, addtl Cont From Capital Projects Fd	138,897.00		

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110491	BUA	05/16/2023	05/16/2023	F-7	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
15	39097407	9830	ADA	BOC	F-7		close out fund 390, addtl Other Improvements		225,309.00	
16	39067407	6921	ADA	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	225,309.00		
17	39097407	9830	ROOF	BOC	F-7		close out fund 390, addtl Other Improvements		167,737.00	
18	39067407	6921	ROOF	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	167,737.00		
19	39097502	9821	MEP	BOC	F-7		close out fund 390, addtl Building and Renovations		62,780.00	
20	39067502	6921	MEP	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	62,780.00		
21	39097502	9830	ROOF	BOC	F-7		close out fund 390, addtl Other Improvements		154,500.00	
22	39067502	6921	ROOF	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	154,500.00		
23	39097503	9821	HVAC	BOC	F-7		close out fund 390, addtl Building and Renovations		244,291.00	
24	39067503	6921	HVAC	BOC	F-7		close out fund 390, addtl Cont From Capital Reserve Fund	244,291.00		
25	10090000	9830	AVAIL	BOC	F-7		close out fund 390, addtl Other Improvements	25,174.00		
26	10069120	6910		BOC	F-7		close out fund 390, addtl Cont From Capital Projects Fd		25,174.00	
27	100	5704		BOC	F-7		Appropriations		25,174.00	1
28	390	5704		BOC	F-7		Appropriations	1,278,291.00		1
29	100	5703		BOC	F-7		Estimated Revenues	25,174.00		1
30	390	5703		BOC	F-7		Estimated Revenues		1,278,291.00	1
							** JOURNAL TOTAL	1,303,465.00	1,303,465.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110499	BUC	05/16/2023	05/16/2023	F-14	snpolitis	1	N	Hist	2023	

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
2023	11	110499	BUC	05/16/2023	05/16/2023	F-14	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	38068240	6918	2024B	BOC	F-14		library/ALC Afton Proceeds from COPS/LOBS		17,500,000.00	
2	38068240	6918	2026B	BOC	F-14		library/ALC Afton Proceeds from COPS/LOBS		10,500,000.00	
3	38098240	9820	LIBSC	BOC	F-14		library/ALC Afton Construction	22,009,667.00		
4	38098240	9660	LIBSC	BOC	F-14		library/ALC Afton Contingency	933,079.00		
5	38098240	9607	LIBSC	BOC	F-14		library/ALC Afton Architects	2,164,144.00		
6	38098240	9860	LIBSC	BOC	F-14		library/ALC Afton Equipment & Furniture	893,110.00		
7	38098240	9862	LIBSC	BOC	F-14		library/ALC Afton Technology	500,000.00		
8	38098240	9830	LIBSC	BOC	F-14		library/ALC Afton Other Improvements	1,500,000.00		
9	380	5704		BOC	F-14		Appropriations		22,009,667.00	1
10	380	5707		BOC	F-14		Budgetary FB - Unreserved	22,009,667.00		1
11	380	5704		BOC	F-14		Appropriations		5,990,333.00	1
12	380	5703		BOC	F-14		Estimated Revenues	28,000,000.00		1
13	380	5707		BOC	F-14		Budgetary FB - Unreserved		22,009,667.00	1
							** JOURNAL TOTAL	50,009,667.00	50,009,667.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110501	BUA	05/16/2023	05/16/2023	F-7	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	38091110	9501	0650	BOC	F-7		close out proj in fund 380 Buildings & Grounds Maintenanc		235,983.00	
2	38061110	6921	0650	BOC	F-7		close out proj in fund 380 Cont From Capital Reserve Fund	235,983.00		
3	38098140	9830	0631	BOC	F-7		close out proj in fund 380 Other Improvements		907,469.00	

JOURNAL INQUIRY

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110501	BUA	05/16/2023	05/16/2023	F-7	snpolitis	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
4	38068140	6910	0631	BOC	F-7		close out proj in fund 380 Cont From Capital Projects Fd	907,469.00		
5	38098140	9830	0628	BOC	F-7		close out proj in fund 380 Other Improvements		927,469.00	
6	38068140	6902	0628	BOC	F-7		close out proj in fund 380 Contribution From General Fund	263,966.00		
7	38068140	6910	0628	BOC	F-7		close out proj in fund 380 Cont From Capital Projects Fd	163,503.00		
8	38068140	6921	0628	BOC	F-7		close out proj in fund 380 Cont From Capital Reserve Fund	500,000.00		
9	38092110	9501	HVAC	BOC	F-7		close out proj in fund 380 Buildings & Grounds Maintenanc		193,000.00	
10	38062110	6921	HVAC	BOC	F-7		close out proj in fund 380 Cont From Capital Reserve Fund	193,000.00		
11	38091110	9830	RPAIR	BOC	F-7		close out proj in fund 380 Other Improvements		1,853,362.00	
12	38091110	9607	RPAIR	BOC	F-7		close out proj in fund 380 Architects		148,958.00	
13	38061110	6910		BOC	F-7		close out proj in fund 380 Cont From Capital Projects Fd	2,002,320.00		
14	380	5704		BOC	F-7		 Appropriations	4,266,241.00		1
15	380	5703		BOC	F-7		 Estimated Revenues		4,266,241.00	1
							** JOURNAL TOTAL	4,266,241.00	4,266,241.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	110516	BUA	05/16/2023	05/16/2023	Fuel	mnxiong	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195610	9301	310-1	5610	Off Sup		From 9445-310-1 Office Supplies	8,000.00		
2	00195610	9346	349-1	5610	Off Sup		From 9445-310-1 Fuel	8,000.00		
3	00195610	9445	310-1	5610	Off Sup		To 5610 off sup & fuel Purchased Services		16,000.00	
							** 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
2023	11	110517	BUA	05/16/2023	05/16/2023	FCSPR	mnxiong	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195760	9445		5760	9445		To 5760-9445-FCSPR Purchased Services		1,700.00	
2	00195760	9445	FCSPR	5760	9445		From 5760-9445 Purchased Services	1,700.00		
							** 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
2023	11	110534	BUA	05/17/2023	05/17/2023	One-time	ypineda	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9346		5410	One-time		Lobby Desk Fuel		1,500.00	
2	00195410	9331		5410	One-time		Lobby Desk Minor Office Equipment & Furn	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
2023	11	110550	BUA	05/17/2023	05/17/2023	Med sup	trligon	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192730	9752				T	First Responder		7,000.00	
2	00192730	9360				T	Medical Supplies	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
2023	11	110556	BUA	05/18/2023	05/18/2023	FLP Projec	msthorne	1	N	Hist	2023	

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
2023	11	110556	BUA	05/18/2023	05/18/2023	FLP Projec	msthorne	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	38098140	9830	FLP	Record	Record		Reallocate Budget to FLP Other Improvements	100,000.00		
2	38098140	9830	RWP	Record	Record		Reallocate Budget to FLP Other Improvements		100,000.00	
							** 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
2023	11	110632	BUA	05/19/2023	05/19/2023	Printing	kdbilafer	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191950	9333		9320	9320		Safety Training & Equipment		1,000.00	
2	00191950	9320		9320	9320		Printing & Binding	1,000.00		
							** 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
2023	11	110680	BUA	05/22/2023	05/22/2023	BLET mat	blconrad	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9635		2110	BLET mat	T	BLET Materials Education Programs	8,016.00		
2	00192110	9653		2110	BLET mat	T	BLET Materials Medical Consultants		8,016.00	
							** 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
2023	11	110681	BUA	05/22/2023	05/22/2023	OfficeDesk	kpgrant	1	N	Hist	2023	

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
2023	11	110681	BUA	05/22/2023	05/22/2023	OfficeDeskkpgrant		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094610	9501		4610	OfficeDesk		Landfill Office Desk Repla Buildings & Grounds Maintenanc		900.00	
2	27094610	9331		4610	OfficeDesk		Landfill Office Desk Repla Minor Office Equipment & Furn	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
2023	11	110701	BUA	05/22/2023	05/22/2023	Office Supkpgrant		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	27094620	9320		4620	Office Sup		Office Supplies		300.00	
2	27094620	9301		4620	Office Sup		Office Supplies Office Supplies	300.00		
							** 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
2023	11	110714	BUA	05/23/2023	05/23/2023	Incentivesypineda		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9109		1910	Incentives		HR Comp Proj Salary Adjustments	200,000.00		
2	00191910	9660		1910	Incentives		HR Comp Proj Contingency		200,000.00	
							** 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
2023	11	110719	BUA	05/23/2023	05/23/2023	Incentivesypineda		1	N	Hist	2023	

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
2023	11	110719	BUA	05/23/2023	05/23/2023	Incentivesypineda		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9109		1910	Incentives		HR Comp Proj Salary Adjustments	100,000.00		
2	00191910	9660		1910	Incentives		HR Comp Proj Contingency		100,000.00	
							** 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
2023	11	110720	BUA	05/23/2023	05/23/2023	Advertisinypineda		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191410	9601		1410	Advertisin		Increase in expected costs Advertising	23.00		
2	00191410	9445		1410	Advertisin		Increase in expected costs Purchased Services		23.00	
							** 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
2023	11	110741	BUA	05/23/2023	05/23/2023	JCPC	jjshuping	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00162910	6242		JCPC	JCPC	T	JCPC BUDGET REVISIONS FY23 Shift Mentoring		3,200.00	
2	00162910	6248		JCPC	JCPC	T	JCPC BUDGET REVISIONS FY23 Fostering Solutions Crisis Bed	23,700.00		
3	00162910	6278		JCPC	JCPC	T	JCPC BUDGET REVISIONS FY23 Get Hired-Youth Employability		2,900.00	
4	00162910	6288		JCPC	JCPC	T	JCPC BUDGET REVISIONS FY23 YDI Afterschool Academy		6,750.00	
5	00162910	6222	UNAL	JCPC	JCPC	T	JCPC BUDGET REVISIONS FY23 JCPC - Unallocated		10,850.00	
							** 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
2023	11	110747	BUA	05/23/2023	05/23/2023	HR Comp Pr	ypineda	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9109		1910	HR Comp Pr		HR Comp Project Salary Adjustments		300,000.00	
2	00191910	9124		1910	HR Comp Pr		HR Comp Project Sign On/Referral Bonuses	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
2023	11	110753	BUA	05/23/2023	05/23/2023	Materials	lcruse	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00193250	9493	HARP	3250	Materials		reallocate to materials Operations-HARP		270.00	
2	00193250	9384	HARP	3250	Materials		reallocate to materials Materials-HARP	270.00		
							** 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
2023	11	110759	BUA	05/23/2023	05/23/2023	Purch Serv	ypineda	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191230	9445		1230	Purch Serv		Increase Purchased Serv Purchased Services	5,000.00		
2	00191230	9610		1230	Purch Serv		Increase Purchased Serv Travel		5,000.00	
							** 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
2023	11	110760	BUA	05/23/2023	05/23/2023	PayGrStruc	ypineda	1	N	Hist	2023	

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
2023	11	110760	BUA	05/23/2023	05/23/2023	PayGrStruc	ypineda	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191230	9605		1230	PayGrStruc		Pay Grade Structure Consultants	50,000.00		
2	00191910	9109		1230	PayGrStruc		Pay Grade Structure Salary Adjustments		50,000.00	
							** 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
2023	11	110766	BUA	05/24/2023	05/24/2023	2130-YE	blconrad	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192130	9331		2130	2130-YE	T	YE Invoices Minor Office Equipment & Furn	10,716.00		
2	00192130	9363		2130	2130-YE	T	YE Invoices Personal Care Supplies		10,716.00	
							** 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
2023	11	110771	BUA	05/24/2023	05/24/2023	planner	ddgustafson	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192715	9320		2710	planner				160.00	
2	00192710	9340		2710	planner		Printing & Binding Uniforms	160.00		
							** 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
2023	11	110774	BUA	05/24/2023	05/24/2023	2130-EdMat	blconrad	1	N	Hist	2023	

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
2023	11	110774	BUA	05/24/2023	05/24/2023	2130-EdMatblconrad		1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192130	9635		2130	2130-EDMat	T	DOCC-Educ. Materials &Unif Education Programs	2,582.00		
2	00192130	9560		2130	2130-EDMat	T	DOCC-Educ. Materials &Unif Minor Equipment Maintenance		1,000.00	
3	00192130	9394		2130	2130-EDMat	T	DOCC-Educ. Materials &Unif Janitorial Supplies		1,582.00	
							** 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
2023	11	110805	BUA	05/24/2023	05/24/2023	FC Board	mnxiong	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00195610	9605	383-1	5630	FC Board		Move to 5630-9462 Consultants		30,000.00	
2	00195630	9445		5630	FC Board		Move to 5630-9462 Purchased Services		100,000.00	
3	00195630	9462		5630	FC Board		From purchased svcs Child State Foster Care	130,000.00		
							** 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
2023	11	110941	BUA	05/30/2023	05/30/2023	Ambulance	ypineda	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00191910	9109		1910	Ambulance		Ambulance Salary Adjustments		345,531.00	
2	00192730	9863		1910	Ambulance		Ambulance Motor Vehicles	345,531.00		
							** 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
2023	11	111009	BUC	05/31/2023	05/31/2023	Broadband	jmhowden	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	44091925	940004	ARP	ARPA			Broadband Contract	50,000.00		
							Broadband			
2	44091925	974914	ARP60	ARPA			Broadband Contract		50,000.00	
							Non-Profits using Cares			
3	440	5704		ARPA				50,000.00		1
							Appropriations			
4	440	5707		ARPA					50,000.00	1
							Budgetary FB - Unreserved			
5	440	5704		ARPA					50,000.00	1
							Appropriations			
6	440	5707		ARPA				50,000.00		1
							Budgetary FB - Unreserved			
							** JOURNAL TOTAL	100,000.00	100,000.00	

YEAR	PER	JOURNAL	SRC	EFF DATE	ENT DATE	JNL DESC	CLERK	ENTITY	AUTO-REV	STATUS	BUD YEAR	JNL TYPE
2023	11	111012	BUA	05/31/2023	05/31/2023	2110-YE	blconrad	1	N	Hist	2023	

LN	ORG	OBJECT	PROJ	REF1	REF2	REF3	LINE DESCRIPTION / ACCOUNT DESCRIPTION	DEBIT	CREDIT	OB
1	00192110	9301		2110	2110-YE	T	YE Invoices		10,000.00	
							Office Supplies			
2	00192110	9310		2110	2110-YE	T	YE Invoices		30,000.00	
							Ammunition			
3	00192110	9340		2110	2110-YE	T	YE Invoices	32,763.00		
							Uniforms			
4	00192110	9441		2110	2110-YE	T	YE Invoices		7,000.00	
							DARE Program Expense			
5	00192110	9560		2110	2110-YE	T	YE Invoices		9,000.00	
							Minor Equipment Maintenance			
6	00192110	9575		2110	2110-YE	T	YE Invoices		3,500.00	
							Carwashes			
7	00192110	9630		2110	2110-YE	T	YE Invoices		3,000.00	
							Dues & Subscriptions			
8	00192110	9635		2110	2110-YE	T	YE Invoices	239.00		
							Education Programs			
9	00192110	9653		2110	2110-YE	T	YE Invoices		12,000.00	
							Medical Consultants			
10	00192110	9860		2110	2110-YE	T	YE Invoices	41,498.00		
							Equipment & Furniture			
							** JOURNAL TOTAL	0.00	0.00	
							** GRAND TOTAL	71,509,183.98	71,509,183.98	

51 Journals printed

** END OF REPORT - Generated by Yesenia Pineda **

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
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:

ATTACHMENTS:

Report

Cabarrus County, North Carolina
General Fund
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2023*

*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	(226,563,987)	(226,563,987)	(225,982,358)	$ -	$ 581,629	99.7%
Other Taxes	(42,293,000)	(42,293,000)	(37,061,523)	-	5,231,477	87.6%
Intergovernmental Revenues	(25,147,250)	(34,038,423)	(28,737,747)	-	5,300,676	84.4%
Permits and Fees	(9,931,343)	(9,931,343)	(8,624,586)	-	1,306,757	86.8%
Sales and Services	(13,454,082)	(13,595,444)	(13,365,594)	-	229,849	98.3%
Investment Earnings	(200,000)	(200,000)	(6,988,568)	-	(6,788,568)	3494.3%
Miscellaneous/Other Finance Sources	(268,900)	(32,009,705)	(359,162)	-	31,650,543	1.1%
TOTAL REVENUES	**(317,858,562)**	**(358,631,901)**	**(321,119,538)**	**$ -**	**$ 37,512,364**	**89.5%**
EXPENDITURES						
GENERAL GOVERNMENT						
Board of Commissioners	$ 657,094	$ 612,094	$ 491,632	$ -	120,463	80.3%
Legal	747,869	1,232,097	1,112,455	29,795-	89,847	92.7%
County Manager	3,263,437	3,078,154	2,125,978	206,584	745,592	75.8%
Communications	881,947	873,243	532,613	1,750	338,880	61.2%
Human Resources	1,431,083	1,487,242	1,007,158	5,000	475,083	68.1%
Tax Collector	1,309,952	1,309,952	1,058,836	-	251,116	80.8%
Tax Administration	2,896,236	2,898,710	2,487,694	-	411,016	85.8%
Board of Elections	1,450,285	1,525,054	863,534	112,599	548,921	64.0%
Register of Deeds	724,395	744,395	656,105	-	88,290	88.1%
Finance	1,643,392	1,694,818	1,452,110	11,250	231,458	86.3%
Information Technology	8,409,701	11,420,126	6,854,609	890,848	3,674,669	67.8%
Non-departmental*	5,279,381	5,964,813	3,434,307	541,500	1,989,007	66.7%
COVID*	-	2,000,000	-	-	2,000,000	0.0%
Infrastructure & Asset Management						
Grounds Maintenance	3,248,549	2,177,101	1,309,735	405,765	461,601	78.8%
Administration	2,344,616	2,491,188	2,140,606	3,008	347,573	86.0%
Sign Maintenance	273,482	273,947	214,648	10,182	49,117	82.1%
Building Maintenance	3,703,494	3,680,596	2,007,906	394,335	1,278,354	65.3%
Facility Services	2,781,355	2,746,194	1,848,080	67,647	830,468	69.8%
Fleet Maintenance	1,389,398	1,915,007	1,037,324	645,853	231,830	87.9%
Contribution to Other Funds	48,300,874	68,321,406	68,311,406	-	10,000	100.0%
Total General Government	**$ 90,736,540**	**$ 116,446,138**	**$ 98,946,737**	**$ 3,326,117**	**$ 14,173,284**	**87.8%**
PUBLIC SAFETY						
Sheriff						
Administration & Operations	$ 26,415,592	$ 31,499,961	23,352,023	2,219,785	$ 5,928,154	81.2%
Jail	14,612,650	14,704,385	11,632,590	242,940	2,828,856	80.8%
Animal Control	1,030,695	1,141,399	953,429	84,693	103,277	91.0%
Animal Shelter	742,624	856,111	615,347	52,835	187,929	78.0%
Courts Maintenance	1,389,057	1,404,374	157,895	159,868	1,086,610	22.6%
Construction Standards	5,409,897	5,582,800	4,168,205	99,190	1,315,405	76.4%
Emergency Management	367,725	544,508	295,324	66,296	182,888	66.4%
Fire Services	1,715,283	1,730,064	1,439,726	39,060	251,278	85.5%
Fire Districts	1,400,000	1,400,000	1,174,285	-	225,715	83.9%
Emergency Medical Services	13,089,064	13,714,050	11,926,095	559,991	1,227,963	91.0%
Emergency Telephone	-	299,021	21,351	19,304	258,366	13.6%
Other Public Safety*	1,324,565	1,347,905	1,136,306	360,229	(148,630)	111.0%
Total Public Safety	**$ 67,497,152**	**$ 74,224,579**	**$ 56,872,575**	**$ 3,904,192**	**$ 13,447,811**	**81.9%**

* 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, 2023*

*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	752,779	761,212	$ 494,849	$ -	$ 266,363	65.0%
Community Development	761,408	1,012,040	736,155	-	275,885	72.7%
Soil & Water Conservation	372,433	385,858	291,391	-	94,466	75.5%
Zoning Administration	271,689	271,689	225,390	15	46,284	83.0%
Economic Development Corporation	830,944	855,944	744,954	19,891	91,099	89.4%
Economic Development Incentives	1,750,000	1,750,000	469,769	-	1,280,231	26.8%
Other Economic & Physical Development*	1,589,433	1,589,433	1,490,498	49,000	49,935	96.9%
Total Economic & Physical Development	**$ 6,328,686**	**$ 6,626,176**	**$ 4,453,006**	**$ 68,906**	**$ 2,104,263**	**68.2%**
ENVIRONMENTAL PROTECTION						
Waste Reduction	$ -	$ -	$ 266	$ 12,500	$ (12,766)	0.0%
Total Environmental Protection	**$ -**	**$ -**	**$ 266**	**$ 12,500**	**$ (12,766)**	**-**
HUMAN SERVICES						
Veterans Services	$ 430,425	$ 433,799	$ 303,229	$ -	$ 130,570	69.9%
Cooperative Extension	448,484	496,967	$ 332,687	-	164,281	66.9%
Human Services						
Administration	5,774,978	6,005,344	5,273,862	180,221	551,260	90.8%
Economic Family Support Services	3,525,779	3,462,346	1,938,876	-	1,523,470	56.0%
Transportation	3,585,333	4,331,465	2,445,991	110,966	1,774,507	59.0%
Child Welfare	12,037,393	12,030,808	8,739,894	213,359	3,077,555	74.4%
Child Support Services	2,167,955	2,167,955	1,849,196	5,254	313,505	85.5%
Economic Services	9,597,964	9,667,964	7,385,041	-	2,282,923	76.4%
Adult and Family Services	2,681,248	2,788,618	2,179,700	1,029	607,888	78.2%
Nutrition	849,245	950,369	676,814	13,325	260,229	72.6%
Behavioral Health Division	-	277,675	171,603	-	106,072	61.8%
Senior Services	796,081	844,480	689,271	37,960	117,249	86.1%
Cabarrus Health Alliance	10,119,709	10,975,869	9,265,587	1,710,282	-	100.0%
Other Human Services*	690,511	3,687,691	1,006,233	947,393	1,734,065	53.0%
Total Human Services	**$ 52,705,105**	**$ 58,121,350**	**$ 42,257,984**	**$ 3,219,790**	**$ 12,643,576**	**78.2%**
EDUCATION						
Cabarrus County Schools Operating	$ 79,269,580	$ 80,908,426	$ 72,663,780	$ -	$ 8,244,646	89.8%
Kannapolis City Schools Operating	9,474,469	9,778,710	8,820,265	-	958,445	90.2%
RCCC Operating	3,951,954	3,951,954	3,622,624	-	329,330	91.7%
Cabarrus County Schools Capital	36,324	111,324	30,270	-	81,054	27.2%
Kannapolis City Schools Capital	8,832	8,832	7,360	-	1,472	83.3%
RCCC Capital	-	-	-	-	-	-
Other Education*	134,405	134,405	123,204	7,034	4,167	96.9%
Total Education	**$ 92,875,564**	**$ 94,893,651**	**$ 85,267,503**	**$ 7,034**	**$ 9,619,114**	**89.9%**
CULTURE & RECREATION						
Active Living & Parks						
Parks	$ 2,296,595	$ 2,655,606	$ 1,605,116	$ 119,181	$ 931,308	64.9%
Senior Centers	862,387	883,182	651,838	12,653	218,690	75.2%
Library System	4,530,534	4,755,220	3,827,471	100,804	826,945	82.6%
Other Cultural & Recreation*	26,000	26,000	26,000	94,500	(94,500)	463.5%
Total Culture & Recreation	**$ 7,715,516**	**$ 8,320,008**	**$ 6,110,426**	**$ 327,138**	**$ 1,882,444**	**77.4%**
DEBT SERVICE						
Schools	$ -	$ -	$ -	$ -	$ -	-
Other	-	-	-	-	-	-
Total Debt Service	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**
TOTAL EXPENDITURES	**$ 317,858,562**	**$ 358,631,901**	**$ 293,908,498**	**$ 10,865,677**	**$ 53,857,727**	**85.0%**
Excess (deficiency) of revenues over (under) expenditures	**$ -**	**$ -**	**$ 27,211,040**	**$ (10,865,677)**	**$ 16,345,363**	

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Cabarrus County, North Carolina
Community Investment Fund
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2023*

***this report was pulled prior to month end close**

	Budgeted Amounts					
	Original	**Final**	**Actual Amounts**	**Encumbrances***	**Variance with Final Budget**	**% Collected or Used**
REVENUES						
Other Taxes	$ (24,900,000)	$ (24,900,000)	$ (21,782,269)	$ -	$ 3,117,731	87.5%
Intergovernmental Revenues	(720,000)	(720,000)	(729,988)	-	(9,988)	101.4%
Investement Earnings	-	-	(648,401)	-	(648,401)	100.0%
Other Finance Sources	(46,891,176)	(86,116,318)	(64,865,518)	-	21,250,800	75.3%
TOTAL REVENUES	**$ (72,511,176)**	**$ (111,736,318)**	**$ (88,026,177)**	**$ -**	**$ 23,710,141**	**78.8%**
EXPENDITURES						
Operations	$ 65,894,181	$ 90,342,275	$ 92,604,047	$ 3,400	$ (2,265,172)	102.5%
Capital Outlay	6,616,995	21,394,043	-	-	21,394,043	0.0%
TOTAL EXPENDITURES	**$ 72,511,176**	**$ 111,736,318**	**$ 92,604,047**	**$ 3,400**	**$ 19,128,871**	**82.9%**
Excess (deficiency) of revenues over (under) expenditures	**$ -**	**$ -**	**$ (4,577,870)**	**$ (3,400)**	**$ 4,581,270**	

* 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
Other Funds
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2023*
*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	$ (1,374,326)	$ (2,967,326)	$ (2,571,636)	$ -	$ 395,689	86.7%
Fair Sales and Services	(749,831)	(749,831)	(597,005)	-	152,826	79.6%
Fair Investment Earnings	(15,000)	(15,000)	(59,521)	-	(44,521)	396.8%
Fair Miscellaneous Revenue	(5,000)	(5,000)	(5,249)	-	(249)	105.0%
Total Arena and Events Center Fund	**$ (2,144,157)**	**$ (3,737,157)**	**$ (3,233,411)**	**$ -**	**$ 503,746**	**86.5%**
EXPENDITURES						
Arena and Events Center	$ 1,374,326	$ 2,967,326	$ 1,120,090	$ 394,825	$ 1,452,410	51.1%
County Fair	769,831	769,831	635,488	17,925	116,418	84.9%
Total Arena and Events Center Fund	**$ 2,144,157**	**$ 3,737,157**	**$ 1,755,578**	**$ 412,750**	**$ 1,568,828**	**58.0%**
Landfill Fund						
REVENUES						
Intergovernmental Revenues	$ (63,000)	$ (63,000)	$ (48,135)	$ -	$ 14,865	76.4%
Permits and Fees	(150,000)	(150,000)	(132,308)	-	17,692	88.2%
Sales and Services	(1,330,000)	(1,330,000)	(1,184,262)	-	145,738	89.0%
Investment Earnings	-	-	(106,509)	-	(106,509)	0.0%
Other Financing Sources	(621,872)	(728,040)	(621,872)	-	106,168	85.4%
Total Landfill Fund	**$ (2,164,872)**	**$ (2,271,040)**	**$ (2,093,087)**	**$ -**	**$ 177,953**	**339.1%**
EXPENDITURES						
Landfill Operations	$ 2,164,872	$ 2,271,040	$ 1,430,103	$ 199,389	$ 641,549	71.8%
Total Landfill Fund	**$ 2,164,872**	**$ 2,271,040**	**$ 1,430,103**	**$ 199,389**	**$ 641,549**	**71.8%**
911 Emergency Telephone Fund						
REVENUES						
Intergovernmental Revenues	$ (614,089)	$ (614,089)	$ (511,741)	$ -	$ 102,348	83.3%
Investment Earnings	(1,500)	(1,500)	(20,088)	-	(18,588)	1339.2%
Other Finance Sources	-	(1,856,964)	-	-	1,856,964	0.0%
Total 911 Emergency Telephone Fund	**$ (615,589)**	**$ (2,472,553)**	**$ (531,829)**	**$ -**	**$ 1,940,724**	**21.5%**
EXPENDITURES						
Operations	$ 615,589	$ 2,472,553	$ 261,416	$ 65,884	$ 2,145,253	13.2%
Debt Service	-	-	-	-	-	0.0%
Total 911 Emergency Telephone Fund	**$ 615,589**	**$ 2,472,553**	**$ 261,416**	**$ 65,884**	**$ 2,145,253**	**13.2%**
Self-Insured Funds						
REVENUES						
Sales and Services	$ (19,359,393)	$ (19,359,393)	$ (15,271,201)	$ -	$ 4,088,192	78.9%
Investment Earnings	(11,000)	(11,000)	(160,062)	-	(149,062)	1455.1%
Miscellaneous	(1,142,014)	(1,142,014)	(811,569)	-	330,445	71.1%
Other Finance Sources	(481,975)	(604,216)	-	-	604,216	0.0%
Total Self-Insured Funds	**$ (20,994,382)**	**$ (21,116,623)**	**$ (16,242,832)**	**$ -**	**$ 4,873,790**	**76.9%**
EXPENDITURES						
Workers Compensation Insurance	$ 1,617,305	$ 1,617,305	$ 905,409	$ -	$ 711,896	56.0%
Liability Insurance	1,685,000	1,685,000	1,068,296	-	616,704	63.4%
Dental Insurance	502,000	602,000	502,722	-	99,278	83.5%
Hospitalization Insurance	17,190,077	17,212,318	13,111,030	604,057	3,497,231	79.7%
Total Self-Insured Funds	**$ 20,994,382**	**$ 21,116,623**	**$ 15,587,457**	**$ 604,057**	**$ 4,925,109**	**76.7%**

Cabarrus County, North Carolina
Other Funds
Statement of Revenues and Expenditures - Budget and Actual
As of May 31, 2023*
*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	$ (6,497,950)	$ (6,924,450)	$ (6,435,166)	$ -	$ 489,284	92.9%
Total Fire Districts Fund	**$ (6,497,950)**	**$ (6,924,450)**	**$ (6,435,166)**	**$ -**	**$ 489,284**	**92.9%**
EXPENDITURES						
Fire Districts	$ 6,497,950	$ 6,924,450	$ 6,435,254	$ -	$ 489,196	92.9%
Total Fire Districts Fund	**$ 6,497,950**	**$ 6,924,450**	**$ 6,435,254**	**$ -**	**$ 489,196**	**92.9%**
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	$ (2,080,000)	$ (2,080,000)	$ (1,663,642)	$ -	$ 416,359	80.0%
Total Intergovernmental Fund	**$ (2,080,000)**	**$ (2,080,000)**	**$ (1,663,642)**	**$ -**	**$ 416,359**	**80.0%**
EXPENDITURES						
Operations	$ 2,080,000	$ 2,080,000	$ 1,599,698	$ -	$ 480,302	76.9%
Total Intergovernmental Fund	**$ 2,080,000**	**$ 2,080,000**	**$ 1,599,698**	**$ -**	**$ 480,302**	**76.9%**
TOTAL REVENUES	**$ (34,896,950)**	**$ (39,001,822)**	**$ (30,199,966)**	**$ -**	**$ 8,801,856**	**77.4%**
TOTAL EXPENDITURES	**$ 34,896,950**	**$ 39,001,822**	**$ 27,069,506**	**$ 1,282,079**	**$ -**	**72.7%**
Excess (deficiency) of revenues over (under) expenditures	**$ -**	**$ -**	**$ 3,130,460**	**$ (1,282,079)**	**$ 8,801,856**	

* In order to be compliant with G.S. 159-28, all p-card transactions are encumbered in the departmental functions within their budgets

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
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, Assistant County Manager

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Report
- Report

Cabarrus County Construction Standards Dodge Report 5/1/2023-5/31/2023

Jurisdiction: All

New Construction

Description	Const Code	Buildings	Housing Units	Estimated Cost
Single Family Houses Detached	101	102	102	$19,029,213.10
Single Family Houses Attached	102	85	85	$11,731,141.00
Five or More Family Buildings	105	12	198	$31,500,000.00
Manufactured Home (Mobile Homes)	106	4	0	$1,242,821.25
Hospitals and Institutional Buildings	323	1	0	$172,400.00
Office, Bank, and Professional Buildings	324	4	0	$2,415,398.00
Schools and Other Educational Buildings	326	1	0	$0.00
Stores and Customer Services	327	3	0	$619,601.00
Other Nonresidential Buildings	328	11	0	$41,587,098.00
Structures Other Than Buildings	329	16	0	$844,472.00
Other	999	9	0	$69,807.00
Sub Total (New Construction)		248	385	$109,211,951.35

Addition, Alteration, and Conversion

Description	Const Code	Buildings	Housing Units	Estimated Cost
Additions, Alterations and Conversions - Residential	434	1	0	$5,000.00
Additions, Alterations and Conversions - Nonresidential and No housekeeping	437	11	0	$1,856,345.84
Sub Total (Addition, Alteration, and Conversion)		12	0	$1,861,345.84
Grand Total		260	385	$111,073,297.19

	File Date	Address	Application Name	Description	Est Cost	Est Sq Ft
BU2023-01609	5/3/2023	3020 DERITA RD CONCORD, NC 28027	HUDSON COMPANY OF TENNESSEE	Derita Rd McDonald's (032-1641)~~Incorporating a new menu board wall, installation of new modular front counter, updating McCafe cell wall finishes, and modifying front counter ceiling/soffit as necessary.	$82,000	500
BU2023-01611	5/3/2023	2011 NC HWY 49 S CONCORD, NC 28027	NORTEK CONSTRUCTION INC	Owens-Corning Reinforcement Solutions~~Conversion of existing print room to server room. Scope of work includes addition of new interior door and frame; relocation of existing FACP; relocation/adjustment of existing fire sprinkler head; installation of new inert fire protection system in server room only. No change in use and no change in square footage. No increase in existing exit travel distance or common path of travel.	$41,900	240
BU2023-01615	5/3/2023	1743 TRINITY CHURCH RD CONCORD, NC 28027	CABARRUS COUNTY SCHOOLS	2023 RCCC ECHS Cafetorium Offices ~~ to add walls to create (3) 10x12 offices	$200,000	360
BU2023-01625	5/4/2023	8440 NC HWY 49 N MT PLEASANT, NC 28124	BARRANCO ENTERPRISES, INC.	installation of new drive thru digital menu boar with separate speaker post/canopy. two new foundations and electric circuit required.	$17,751	25
BU2023-01627	5/4/2023	140 DALE EARNHARDT BLVD KANNAPOLIS, NC 28081	NATIONAL CUSTOM CORPORATE SERVICES INC	Hardee's Kannapolis Menu Board~~includes two new footers and new electrical circuit required	$17,751	25
BU2023-01649	5/5/2023	740 CABARRUS AVE W CONCORD, NC 28027	RITE LITE SIGNS, INC.	Pizza Hut Signage~~Refurbish the current sign and re-install	$6,025	0
BU2023-01680	5/8/2023	8111 CONCORD MILLS BLVD CONCORD, NC 28027	SOUTHWOOD CORPORATION	Primark~~installing three exterior wall signs that are internally illuminated and two interior wall signs that are internally illuminated.	$200	0
BU2023-01682	5/8/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 1	SHELL ONLY BUILDING 1	$0	121,268
BU2023-01683	5/8/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 1	UPFIT FLOOR 2 ZONE A BUILDING 1	$15,000,000	10,845
BU2023-01685	5/8/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 1	FLOOR 2 UPFIT ZONE B BUILDING 1-	$15,000,000	50,396
BU2023-01686	5/8/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 5	SHELL ONLY BUILDING 5	$0	71,391
BU2023-01687	5/8/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 5	FLOOR 2-5 UPFIT BUILDING 5	$0	57,456
BU2023-01693	5/8/2023	1 CANNON BALLER WAY KANNAPOLIS, NC 28081	SYNERGY RESOURCES LLC	Batter's Eye, Centerfield Concession, and public restrooms~~1860 sf free standing commercial kitchen (smokers only) less than 2500 sf, 2 single occupancy restrooms, and associated plumbing, mechanical, and electrical infrastructure for the new building. Exterior finish over existing vertical structural steel frame (approx 2160 sf per side) "B" occupancy per NCBC 304.1 Type IIB construction.	$367,601	1,860
BU2023-01700	5/8/2023	603 CONCORD PKWY N CONCORD, NC 28027	CASCO SIGNS INC	Shoprite- sign relocation of existing pylon sign	$5,000	120
BU2023-01705	5/9/2023	2515 KANNAPOLIS HWY CONCORD, NC 28025	G.W. LILES CONSTRUCTION COMPANY, INC (RETAINING WALL)	The retaining wall is located on the mini-storage site.	$23,500	0
BU2023-01707	5/9/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC Bldg. 1	UPFIT FLOOR 3 ZONE A BUILDING 1 12 UNITS	$150,000	10,845
BU2023-01708	5/9/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 1	UPFIT FLOOR 4 ZONE A BUILDING 1 12 UNITS	$150,000	10,845
BU2023-01709	5/9/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC Bldg. 1	UPFIT FLOOR 5 ZONE A BUILDING 1 13 UNITS	$150,000	10,845
BU2023-01710	5/9/2023	199 WILSHIRE AVE SW CONCORD, NC 28025	GUY ROOFING	213 SQS Flat Roof - Mechanically Attach a 115 mil Reinforced Polyester Backed TPO Extreme roof system to the tongue and groove wood roof decks	$119,900	21,300
BU2023-01717	5/9/2023	2011 NC HWY 49 S CONCORD, NC 28027	SOUTHERN INDUSTRIAL CONSTRUCTORS, INC.	COMMERCIAL UPFIT - INSTALL MEZZANINE AND RACKING SYSTEM	$400,000	0
BU2023-01718	5/10/2023	8905 CONNOVER HALL AVE CHARLOTTE, NC 28215	GraphiCal Creations, Inc.	SCHOOL BUS SHELTER for Commons at Farmington	$11,500	129
BU2023-01726	5/10/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC	GYM 1485 SQ FT, EQUIPMENT ROOM FOR POOL 491 SQ FT, CLUBHOUSE 1709 SQ FT, LEASING 1290 SQ FT, MAILROOM 271 SQ FT, PACKAGING ROOM 134 SQ FT CORRIDORE 1485 SQ FT	$0	6,865
BU2023-01730	5/10/2023	17007 DELANEY DR CONCORD, NC 28027	NIGHT OWL NATIONAL CONTRACTORS, INC.	REPLACING WATER DAMAGED DRYWALL, INSULATION, CABINETS AND FLOOR	$9,333	1,424
BU2023-01731	5/10/2023	17115 DELANEY DR CONCORD, NC 28027	NIGHT OWL NATIONAL CONTRACTORS, INC.	REPLACING WATER DAMAGED DRYWALL, INSULATION, CABINETS AND FLOOR	$9,333	1,424
BU2023-01733	5/10/2023	17215 DELANEY DR CONCORD, NC 28027	NIGHT OWL NATIONAL CONTRACTORS, INC.	REPLACING WATER DAMAGED DRYWALL, INSULATION, CABINETS AND FLOOR	$9,333	1,424
BU2023-01734	5/10/2023	17315 DELANEY DR CONCORD, NC 28027	NIGHT OWL NATIONAL CONTRACTORS, INC.	REPLACING WATER DAMAGED DRYWALL, INSULATION, CABINETS AND FLOOR	$9,333	1,424
BU2023-01747	5/10/2023	3 GOODMAN RD CONCORD, NC 28027	William Stanley	Storage Building for Asphalt company	$60,000	5,722

	File Date	Address	Application Name	Description	Est Cost	Est Sq Ft
BU2023-01749	5/10/2023	100 GOODMAN CIR NE CONCORD, NC 28025	Alliance Dental - Wall sign	Alliance Dental~~one wall sign that is internally illuminated and one ground sign that is non illuminated.	$5,000	15
BU2023-01756	5/11/2023	50 FENWAY PL SW CONCORD, NC 28027	EVOLVE CONSTRUCTION, LLC (SIGN)	Evolve at Concord Building Banners~~Install 2 building banners at property on building walls	$2,000	0
BU2023-01758	5/11/2023	380 GEORGE W LILES PKWY NW CONCORD, NC 28027	R. A. HEATH CONSTRUCTION, INC.	Starbucks~~Tenant Interior Upfit of Shell (PRB2022-02059) for a new Starbucks coffee shop. Signage to be submitted under separate permit.	$285,113	2,500
BU2023-01773	5/11/2023	6361 GLEN AFTON BLVD CONCORD, NC 28027	Reynolds Rack Addition	Reynolds Rack Addition ~~ New structural drive in & selective pallet rack	$1,263,000	50,470
BU2023-01779	5/12/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC Bldg. 1	UPFIT FLOOR 3 ZONE B BUILDING 1 14 UNITS	$150,000	10,845
BU2023-01781	5/12/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC Bldg. 1	UPFIT FLOOR 4 ZONE B BUILDING 1 14 UNITS	$150,000	10,845
BU2023-01784	5/12/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC Bldg. 1	UPFIT FLOOR 5 ZONE B BUILDING 1 14 UNITS	$150,000	10,845
BU2023-01786	5/12/2023	3395 JACOBS CROSSING BLVD SW CONCORD, NC 28027	FINIAL CONSTRUCTION, LLC (SHELL)	Settler's Landing Commons Outparcel #3~~SHELL for Mercantile	$355,000	5,200
BU2023-01787	5/12/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 5	BUILDING 5 FLOOR 2 14 UNITS	$150,000	10,845
BU2023-01788	5/12/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 5	BUILDING 5 FLOOR 3 14 UNITS	$150,000	10,845
BU2023-01789	5/12/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 5	BUILDING 5 FLOOR 4 14 UNITS	$150,000	10,845
BU2023-01791	5/12/2023	9620 CHRISTENBURY PKWY CONCORD, NC 28027	C HERMAN CONSTRUCTION LLC BUILDING 5	BUILDING 5 FLOOR 5 14 UNITS	$150,000	10,845
BU2023-01797	5/12/2023	940 S CANNON BLVD KANNAPOLIS, NC 28083	Jko printing and Sign / EDGAR ORTIZ	EZ Beauty~~ LED Channel Letters SIGN	$3,000	0
BU2023-01802	5/12/2023	3389 JACOBS CROSSING BLVD SW CONCORD, NC 28027	FINIAL CONSTRUCTION, LLC (RETAINING WALL)	Jacobs Crossing Segmental Retaining Wall #1; 232.50'. Address Assigned by George Daniels.	$21,765	0
BU2023-01808	5/12/2023	3699 PATRIOTS PLACE DR CONCORD, NC 28025		REPLACE MONUMENT SIGN FACE	$3,500	30
BU2023-01810	5/15/2023	3049 DERITA RD CONCORD, NC 28027	STRUCTURAL COMPONENTS LLC	Extend existing dywidag to 77.5'	$13,500	0
BU2023-01812	5/15/2023	3699 PATRIOTS PLACE DR CONCORD, NC 28025		REPLACE MONUMENT SIGN FACE	$3,500	30
BU2023-01820	5/15/2023	7500 HENDRICK AUTO PLZ NW CONCORD, NC 28027	JAMES R VANNOY & SONS CONST. (SHELL, Phase 1A)	FOOTING AND FOUNDATION ONLY!!! AMC Building- Shell Phase 1A~~New 1-Story Concrete Tilt Building. Steel Frame roof. 269,500 GSF. Shell Only.	$2,000,000	269,500
BU2023-01828	5/16/2023	9101 EDENBURY DR CONCORD, NC 28027	NEW DIMENSIONS OUTDOOR SERVICES INC	Christenbury Commons Townhomes~~ INSTALLATION OF (5) MECHANICALLY STABILIZED EARTH WALLS AS SPECIFIED ON SITE PLANS AS: WALL NO. 1 WALL NO. 2 WALL NO. 3 WALL NO. 6 WALL NO. 7	$116,000	0
BU2023-01843	5/16/2023	3045 BELL SPUR AVE SW CONCORD, NC 28027	EDGEWATER POOLS, LLC (POOL)	Spring Meadows Pool~~construction of pool with equipment	$145,000	1,533
BU2023-01844	5/17/2023	560 WOODHAVEN PL NW 100 CONCORD, NC 28027	COLONY BUILDERS INC	COMMERCIAL UPFIT	$279,000	2,400
BU2023-01863	5/18/2023	5650 SANDUSKY BLVD CONCORD, NC 28027	NATIONAL COUNCIL FOR LEADERSHIP - C/O LEADERSHIP IN THE CLOUDS	STAGE - NO ZONING, NO PLAN REVIEW PER DAVID M.	$500	768
BU2023-01867	5/18/2023	466 WALKER RD MT PLEASANT, NC 28124	CABARRUS COUNTY SCHOOLS / BETH BOBREK	8 X 16 BUILDING BESIDE TRACK FOR MOUNT PLEASANT MIDDLE SCHOOL	$0	1,024
BU2023-01868	5/18/2023	118 S MAIN ST KANNAPOLIS, NC 28081	DAVID C ROWLAND (2nd floor)	Marketplace - Up-fit (2nd floor) ~~ Kannapolis ventures phase 2 marketplace~~Marketplace expansion of second floor. Architectural only, PME fire protection was approved during phase 1.	$200,000	12,044
BU2023-01877	5/19/2023	4250 MAIN ST 100 HARRISBURG, NC 28075	JNS CONSTRUCTION COMPANY, INC.	Marsh Kitchen~~~kitchen cabinet showroom to display products for customer selection with sales offices, breakroom, conference room and three restrooms. metal stud framing with drywall finish and lay-in-ceilings throughout office areas	$52,000	3,800
BU2023-01879	5/19/2023	807 NEVADA ST KANNAPOLIS, NC 28083	Terry Holmes	AT&T proposes to remove and replace antennas on the existing telecom tower. No ground work or change in tower height. All work contained in the compound.	$26,600	0
BU2023-01897	5/22/2023	540 PITTS SCHOOL RD NW C CONCORD, NC 28027	WINDSOR CONTRACTINC, LLC (UNIT C UPFIT)	BUILDING C UPFIT/ UNIT C ~~	$245,000	378,000

	File Date	Address	Application Name	Description	Est Cost	Est Sq Ft
BU2023-01900	5/22/2023	4521 MOREHEAD RD CONCORD, NC 28027	ENLOE INC	Speedway Xpress Mart Amoco~~Install new monument sign on existing foundation using existing electrical.	$9,047	32
BU2023-01908	5/22/2023	11056 RENAISSANCE DR DAVIDSON, NC 28036	CASCO SIGNS INC	Ability Chiropractor ~~ Install one wall sign and make final electrical connections	$6,300	24
BU2023-01941	5/23/2023	1420 CONCORD PKWY S CONCORD, NC 28027	Eli Lilly Concord - (Buildings 4 UPFIT)	BUILDING 4 UPFIT	$38,230,598	379,100
BU2023-01942	5/23/2023	1420 CONCORD PKWY S CONCORD, NC 28027	BE&K BUILDING GROUP INC(Building 6 UPFIT)	(Building 6 UPFIT)	$0	0
BU2023-01945	5/24/2023	1028 CENTRAL DR NW CONCORD, NC 28027	IKES CONSTRUCTION INC	DBATS~~Work includes demo, minor framing, minor flooring, paint, fencing, replacing water fountain, electrical.	$229,553	0
BU2023-01967	5/25/2023	7201 HENRY FURR DR CONCORD, NC 28025	FURR HOMES LLC, ROSS	Accessory Storage Building	$200,000	4,000
BU2023-01976	5/25/2023	13470 PLAZA RD EXT CHARLOTTE, NC 28215	SHELCO, LLC.	Plaza Road MOB 2 Approx. 15,000 sf single story medical office building shell.	$1,906,845	15,000
BU2023-01988	5/25/2023	227 NC HWY 49 S 101 CONCORD, NC 28025	WHITING-TURNER CONTRACTING COMPANY	Kroger FC11 Signage ~~ Permit submission for monument sign, Kroger building sign, way finding signage and exterior door signage	$80,000	163
BU2023-01996	5/26/2023	8601 CONCORD MILLS BLVD CONCORD, NC 28027	MASTEC NETWORK SOLUTIONS	Concord Mills Charter SWF ~~ Proposed Charter/Spectrum small wireless facility on rooftop; breaker addition, wall mounts, and conduits.	$2,000	0
BU2023-02000	5/26/2023	6056 BAYFIELD PKWY CONCORD, NC 28027	THE KIRKLAND COMPANIES, LLC	European Wax Upfit ~~ Interior Upfit to include new lighting, new power outlets, new low voltage, new plumbing layout, including underground work, new mechanical layout, new ceiling, new finishes	$25,650	1,494
BU2023-02010	5/26/2023	740 CABARRUS AVE W CONCORD, NC 28027	RITE LITE SIGNS, INC.	Pizza Hut Monument sign Cabarrus Ave~~Installation of the monument sign	$16,000	0
BU2023-02043	5/31/2023	1470 S MAIN ST MT PLEASANT, NC 28124	CASCO SIGNS INC	Buddy's Place~~ Install one wall sign that is non illuminated	$1,000	0
				Total Plans Reviewed: 66	**$393,084,655**	**7,948,875**

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
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, Assistant County Manager

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	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
Kannapolis	1302 PUMP STATION ROAD	1302 Pump Station Road	APF2022-00060	Dale Fink	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending	Single Family		11	0	11			4.224	2.123	2.816	9.163	4.224	2.123	2.816	9.163
Kannapolis	200 MAIN	200 MAIN / VIDA II	APF2022-00020	Aaron Wagoner	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Multi Family	1/18/2023	78	97	-19			0	0	0	0	-4.408	-2.204	-2.945	-9.557
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	12/29/2022	2	7	-5			0.828	0.414	0.552	1.794	-0.69	-0.345	-0.46	-1.495
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		Construction Drawing Review	Single Family	5/12/2023	157	41	116			60.288	30.301	40.192	130.781	44.544	22.388	29.696	96.628
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	12/1/2022	55	52	3							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
Kannapolis	ALL 4 U HOMES	ALL 4 U HOMES	APF2022-00056	BRIAN UPTON	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Single Family		14	0	14			5.376	2.702	3.584	11.662	5.376	2.702	3.584	11.662
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	5/18/2023	58	24	34			23.04	11.58	15.36	49.98	13.056	6.562	8.704	28.322
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	3/27/2023	300	35	265			0	0	0	0	101.76	51.145	67.84	220.745
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	1/9/2023	20	13	7	10/21/2002		7.68	3.86	5.12	16.66	2.688	1.351	1.792	5.831
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	ARDMORE AT PARKWOOD-MF	ARDMORE AT PARKWOOD-MF	APF2018-00009	BRYCE MORRISON	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Townhouse		282	0	282			43.056	21.528	28.704	93.288	38.916	19.458	25.944	84.318
Concord	ARDMORE AT PARKWOOD-SFA	ARDMORE AT PARKWOOD-SFA	APF2021-00044	BRYCE MORRISON	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Townhouse		35	0	35			4.83	2.415	3.22	10.465	4.83	2.415	3.22	10.465
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		Active Building Permitting	Multi Family		270	0	270			62.64	31.32	41.85	135.81	62.64	31.32	41.85	135.81
Kannapolis	ASHE AVENUE PROPERTY	ASHE AVENUE PROPERTY	APF2022-00047	ASHE BRADY	A L Brown High School	Kannapolis Middle School			Active Building Permitting	Single Family	2/22/2023	7	2	5			2.688	1.351	1.792	5.831	1.92	0.965	1.28	4.165
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		Closed-Built Out	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	APF2016-00012	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
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
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	9/21/2022	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		Closed-Built Out	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		Closed-Built Out	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
Cabarrus County	BOULDER RUN	BOULDER RUN	APF2023-00009	BRIAN LAFRANCHI	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending			50	0	50							11.6	5.8	7.75	25.15
Concord	BRANCHVIEW TOWNHOMES	BRANCHVIEW TOWNHOMES	APF2022-00037	TIA CARDINE	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			5	0	5							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		Void	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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
Kannapolis	BRIDGES OF CABARRUS APARTMENTS	BRIDGES OF CABARRUS APARTMENTS	APF2016-00024	KLK Properties	Concord High School	Concord Middle School	Royal Oaks Elementary School		Closed-Built Out	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	8/11/2022	72	11	61	9/12/2016	9/12/2018	9.936	4.968	6.624	21.528	8.418	4.209	5.612	18.239
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 COMMONS	BROWN MILL COMMONS	APF2023-00008	ED HOSACK	Unassigned HS Feeder Area	HD Winkler Middle School	Weddington Hills Elementary School		Pending			96	0	96							22.272	11.136	14.88	48.288
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	6/6/2023	78	78	0			18.096	9.048	12.09	39.234	0	0	0	0
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
Concord	BURRAGE ROAD	BURRAGE ROAD	APF2023-00006	KEN FOSTER	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			25	0	25							5.8	2.9	3.875	12.575
Concord	CABARRUS AVENUE MIXED USE	CABARRUS AVENUE MIXED USE	APF2019-00026	PATRICK RILEY	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending	Multi Family		199	0	199			14.848	7.424	9.92	32.192	46.168	23.084	30.845	100.097
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
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
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	6/1/2023	95	6	89			36.48	18.335	24.32	79.135	34.176	17.177	22.784	74.137
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
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							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		Closed-Built Out	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							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 DRIVE TRIPLEXES	CENTRAL DRIVE TRIPLEXES	APF2023-00007	OMO ELEFO	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Pending			12	0	12							2.784	1.392	1.86	6.036
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	CHERRY GROVE	CHERRY GROVE	APF2022-00064	BOST DANNY G LLC	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Construction Drawing Review	Townhouse		134	0	134			18.492	9.246	12.328	40.066	18.492	9.246	12.328	40.066
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	5/2/2023	92	32	60			35.328	17.756	23.552	76.636	23.04	11.58	15.36	49.98
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 Building Permitting	Townhouse	5/30/2023	181	58	123			24.978	12.489	16.652	54.119	16.974	8.487	11.316	36.777
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 Building Permitting	Single Family	5/2/2023	92	32	60			35.328	17.756	23.552	76.636	23.04	11.58	15.36	49.98
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	5/12/2023	160	198	-38			37.12	18.56	24.8	80.48	-8.816	-4.408	-5.89	-19.114
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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
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
Kannapolis	CONCORD LAKES TOWNHOMES	CONCORD LAKES TOWNHOMES	APF2022-00051	PROVIDENCE LAND GROUP, PLLC	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Pending	Townhouse		120	0	120			16.56	8.28	11.04	35.88	16.56	8.28	11.04	35.88
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
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
Concord	CORBAN SENIOR LIVING	CORBAN SENIOR LIVING	APF2023-00010	KARUIAM BOOKER	Concord High School	Concord Middle School	W M Irvin Elementary School		Pending			11	0	11							2.552	1.276	1.705	5.533
Kannapolis	COTTAGE APARTMENTS	COTTAGE APARTMENTS	APF2022-00048	DALE FINK	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Construction Drawing Review			12	0	12							2.784	1.392	1.86	6.036
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
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
Harrisburg	COURTYARDS AT HARRISBURG PHASE III	COURTYARDS AT HARRISBURG PHASE III	APF2017-00003	NEWSTYLE COMMUNITIES	Hickory Ridge High School	C C Griffin Middle School	Harrisburg Elementary School		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		Void	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	6/7/2023	142	26	116			54.528	27.406	36.352	118.286	44.544	22.388	29.696	96.628
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
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	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	5/16/2023	48	47	1							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	4/26/2023	11	6	5			1.518	0.759	1.012	3.289	0.69	0.345	0.46	1.495
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	9/28/2022	4	4	0			0.552	0.276	0.368	1.196	0	0	0	0
Kannapolis	EARNHARDT TOWN CENTER-MF	EARNHARDT TOWN CENTER-MF	APF2022-00045	ACRO DEVELOPMENT SERVICES	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Pending			557	0	557							129.224	64.612	86.335	280.171
Kannapolis	EARNHARDT TOWNCENTER-SFA	EARNHARDT TOWNCENTER-SFA	APF2022-00044	ACRO DEVELOPMENT SERVICES	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Pending			161	0	161							37.352	18.676	24.955	80.983
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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
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
Kannapolis	EVANS MULTIFAMILY	Evan Multi Family	APF2022-00062	CESI	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Winecoff Elementary School		Construction Drawing Review	Townhouse		24	0	24			0	0	0	0	3.312	1.656	2.208	7.176
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	9/7/2022	108	90	18	1/20/2005		41.472	20.844	27.648	89.964	6.912	3.474	4.608	14.994
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
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
Kannapolis	GAY STREET TOWNHOMES	GAY STREET TOWNHOMES	APF2022-00058	JARED DULLUM	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending			6	0	6							1.392	0.696	0.93	3.018
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							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 - SFA	GEORGE LILES RESIDENTIAL - SFA	APF2021-00016	KATIE BRADLEY		HD Winkler Middle School	Weddington Hills Elementary School		Pending	Multi Family		85	0	85			27.84	13.92	18.6	60.36	19.72	9.86	13.175	42.755
Concord	GEORGE LILES RESIDENTIAL - SFD	GEORGE LILES RESIDENTIAL - SFD	APF2023-00002	SCOTT KIGER		HD Winkler Middle School	Weddington Hills Elementary School		Pending			23	0	23							5.336	2.668	3.565	11.569
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	4/5/2023	741	29	712	3/1/2005		102.258	51.129	68.172	221.559	98.256	49.128	65.504	212.888
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		Construction Drawing Review	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		Construction Drawing Review	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
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	5/8/2023	51	27	24			19.584	9.843	13.056	42.483	9.216	4.632	6.144	19.992
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	5/19/2023	207	92	115			28.566	14.283	19.044	61.893	15.87	7.935	10.58	34.385
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	5/16/2023	140	129	11			53.76	27.02	35.84	116.62	4.224	2.123	2.816	9.163
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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
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	5/4/2023	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
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		Closed-Built Out	Single Family	9/29/2022	27	23	4	1/20/2003		10.368	5.211	6.912	22.491	1.536	0.772	1.024	3.332
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 CROSSING-MF	KANNAPOLIS CROSSING-MF	APF2023-00005	CAROLYN MARTIN					Pending			220	0	220							51.04	25.52	34.1	110.66
Kannapolis	KANNAPOLIS CROSSING-SFA	KANNAPOLIS CROSSING-SFA	APF2023-00004	CAROLYN MARTIN					Pending			33	0	33							7.656	3.828	5.115	16.599
Kannapolis	KANNAPOLIS CROSSING-SFD	KANNAPOLIS CROSSING-SFD	APF2023-00003	CAROLYN MARTIN					Pending			300	0	300							69.6	34.8	46.5	150.9
Kannapolis	KANNAPOLIS HWY 3 APARTMENTS	KANNAPOLIS HWY 3 APARTMENTS	APF2022-00050	V3 SOUTHEAST	A L Brown High School	Kannapolis Middle School	Fred L Wilson Elementary School		Pending	Multi Family		280	0	280			64.96	32.48	43.4	140.84	64.96	32.48	43.4	140.84
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 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
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
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	7/29/2022	960	901	59	10/27/2011	10/27/2026	368.64	185.28	245.76	799.68	22.656	11.387	15.104	49.147
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 DUPLEXES	LAKESIDE AT BEDFORD FARMS DUPLEXES	APF2022-00054	DONALD MUNDAY	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Pending	Multi Family		30	0	30			0	0	0	0	6.96	3.48	4.65	15.09
Concord	LAKESIDE AT BEDFORD FARMS SFR	LAKESIDE AT BEDFORD FARMS SFR	APF2008-00065	DONALD MUNDAY	Mt Pleasant High School	Mt Pleasant Middle School	W M Irvin Elementary School		Pending	Single Family		118	0	118	3/20/2007	9/22/2010	45.312	22.774	30.208	98.294	45.312	22.774	30.208	98.294
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
Kannapolis	LAUNDRY STREET DEVELOPMENT	LAUNDRY STREET DEVELOPMENT	APF2022-00065	KING ENGINEERING OF CONCORD	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Void			6	0	6							1.392	0.696	0.93	3.018
Kannapolis	LAUNDRY STREET EXT	Laundry Street Extension Subdivision	APF2022-00063	Sam King Jr	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Construction Drawing Review			6	0	6							1.392	0.696	0.93	3.018
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	2/28/2023	7	1	6			2.688	1.351	1.792	5.831	2.304	1.158	1.536	4.998
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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
Concord	LOWER ROCKY RIVER ROAD PROPERTIES	LOWER ROCKY RIVER PROPERTIES	APF2019-00008	SARA SHIRLEY	Central Cabarrus High School	C C Griffin Middle School	Patriots Elementary School		Sketch	Single Family		106	0	106			0	0	0	0	40.704	20.458	27.136	88.298
Concord	LUCKY DRIVE SITE	LUCKY DRIVE SITE	APF2018-00032	EDDIE MOORE	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Single Family	6/7/2023	0	10	-10			0	0	0	0	-3.84	-1.93	-2.56	-8.33
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	1/10/2023	44	41	3	5/12/2005	12/31/2013	13.992	6.116	5.456	25.564	1.152	0.579	0.768	2.499
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	3/1/2023	6	5	1			2.304	1.158	1.536	4.998	0.384	0.193	0.256	0.833
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	3/31/2023	66	76	-10			9.108	4.554	6.072	19.734	-1.38	-0.69	-0.92	-2.99
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	6/1/2023	296	14	282			68.672	34.336	45.88	148.888	65.424	32.712	43.71	141.846
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		Void	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		Void	Single Family		283	0	283			47.616	23.932	31.744	103.292	108.672	54.619	72.448	235.739
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
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
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
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	MLKJ AV MIXED USE DEVELOPMENT	MLKJ AV MIXED USE DEVELOPMENT	APF2022-00052	JEFF YOUNG	A L Brown High School	Kannapolis Middle School	Woodrow Wilson Elementary School		Pending	Single Family		12	0	12			4.608	2.316	3.072	9.996	4.608	2.316	3.072	9.996
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
Concord	MYERS RESIDENTIAL ON ODELL	MYERS RESIDENTIAL ON ODELL	APF2015-00008	UNICA U B O	Cox Mill High School	Harris Road Middle School	W R Odell Elementary School		Pending	Single Family		175	0	175			67.2	33.775	44.8	145.775	67.2	33.775	44.8	145.775
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	11/10/2022	29	16	13	8/10/2005	4/25/2012	11.136	5.597	7.424	24.157	4.992	2.509	3.328	10.829
Kannapolis	NEXUS MILL CREEK	NEXUS MILL CREEK	APF2021-00005	HUNTER OGLESBY	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		258	0	258			68.208	34.104	45.57	147.882	59.856	29.928	39.99	129.774
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
Kannapolis	OAK RIDGE II	OAK RIDGE II	APF2022-00053	DONALD M PAGE	Concord High School	Concord Middle School	Royal Oaks Elementary School		Pending	Multi Family		11	0	11			2.552	1.276	1.705	5.533	2.552	1.276	1.705	5.533
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	5/12/2023	189	8	181			26.082	13.041	17.388	56.511	24.978	12.489	16.652	54.119
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	5/26/2023	84	91	-7			11.592	5.796	7.728	25.116	-0.966	-0.483	-0.644	-2.093
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	1/30/2023	5	13	-8	1/15/2004		1.92	0.965	1.28	4.165	-3.072	-1.544	-2.048	-6.664
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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
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	5/2/2023	40	36	4			15.36	7.72	10.24	33.32	1.536	0.772	1.024	3.332
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	2/23/2023	198	71	127			76.032	38.214	50.688	164.934	48.768	24.511	32.512	105.791
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
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	5/4/2023	67	13	54			9.246	4.623	6.164	20.033	7.452	3.726	4.968	16.146
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	PIEDMONT CONCORD LAKE	PIEDMONT CONCORD LAKE	APF2014-00012	Jason Oesterreich	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School	Kannapolis Intermediate School	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	5/23/2023	268	52	216			36.984	18.492	24.656	80.132	29.808	14.904	19.872	64.584
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
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	POOL PLACE THOWNHOMES	POOL PLACE THOWNHOMES	APF2022-00055	JOSH BUTLER		Northwest Cabarrus Middle School	Winecoff Elementary School		Pending	Townhouse		38	0	38			0	0	0	0	5.244	2.622	3.496	11.362
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
Kannapolis	PROJECT KP-73	PROJECT KP-73	APF2022-00046	KEN JONMAIRE	Northwest Cabarrus High School	Northwest Cabarrus Middle School	Charles A Boger Elementary School		Pending	Multi Family		300	0	300			69.6	34.8	46.5	150.9	69.6	34.8	46.5	150.9
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		Active Building Permitting	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	6/14/2022	224	242	-18			86.016	43.232	57.344	186.592	-6.912	-3.474	-4.608	-14.994
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	10/19/2022	166	116	50			38.512	19.256	25.73	83.498	11.6	5.8	7.75	25.15
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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
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 SUBDIVISION	ROBERTA ROAD SUBDIVISION	APF2023-00001	SAM KING		J N Fries Middle School	Wolf Meadow Elementary School		Pending			7	0	7							1.624	0.812	1.085	3.521
Concord	ROBERTA ROAD SUBDIVISION SOUTH	ROBERTA ROAD SUBDIVISION 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		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
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
Kannapolis	SOUTH RIDGE MULTI FAMILY	SOUTH RIDGE MULTI FAMILY	APF2022-00057	CHRIS WATTS	A L Brown High School	Kannapolis Middle School	Forest Park Elementary School		Construction Drawing Review	Multi Family	1/24/2023	6	6	0			1.392	0.696	0.93	3.018	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	1/4/2023	15	9	6		8/8/2012	5.76	2.895	3.84	12.495	2.304	1.158	1.536	4.998
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	4/11/2023	145	73	72		8/8/2012	20.01	10.005	13.34	43.355	9.936	4.968	6.624	21.528
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	6/2/2023	169	142	27			44.16	22.195	29.44	95.795	10.368	5.211	6.912	22.491
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	5/9/2023	191	29	162			73.344	36.863	48.896	159.103	62.208	31.266	41.472	134.946
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		Closed-Built Out	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							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							55.912	27.956	37.355	121.223

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Remaining Middle	High Remaining	Remaining Total
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							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		Closed-Built Out	Single Family	10/12/2022	203	206	-3			77.952	39.179	51.968	169.099	-1.152	-0.579	-0.768	-2.499
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	6/1/2023	805	481	324	10/18/1999	1/21/2016	309.12	155.365	206.08	670.565	124.416	62.532	82.944	269.892
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 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
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	8/11/2022	115	49	66			44.16	22.195	29.44	95.795	25.344	12.738	16.896	54.978
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	5/31/2023	91	33	58			12.558	6.279	8.372	27.209	8.004	4.002	5.336	17.342
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	7/14/2022	114	51	63			43.776	22.002	29.184	94.962	24.192	12.159	16.128	52.479
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	Closed-Built Out	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

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 Log Expiration	Elementary Students	Middle Students	High Students	Total Students	Remaining Elementary	Middle Remaining	High Remaining	Remaining Total
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 APARTMENTS	WATERSTONE AT WEDDINGTON APARTMENTS	APF2008-00137	Brian Kaiser	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Closed-Built Out	Multi Family	1/17/2013	412	476	-64	11/21/2006		61.8	22.66	29.664	114.124	-14.848	-7.424	-9.92	-32.192
Concord	WEBUILD CONCORD	WEBUILD CONCORD	APF2022-00049	KARUIAM BOOKER	Jay M Robinson High School	Concord Middle School	Wolf Meadow Elementary School		Pending	Townhouse		26	0	26			3.588	1.794	2.392	7.774	3.588	1.794	2.392	7.774
Concord	WEDDINGTON HILLS OF CONCORD	WEDDINGTON HILLS OF CONCORD	APF2019-00020	HOLLY PAGEL	Jay M Robinson High School	HD Winkler Middle School	Carl A Furr Elementary School		Pending	Multi Family		144	0	144			68.904	34.452	46.035	149.391	33.408	16.704	22.32	72.432
Concord	WEDDINGTON ROAD SINGLE FAMILY DETACHED	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		Closed-Built Out	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	6/14/2022	13	2	11	9/23/2008	9/14/2012	4.992	2.509	3.328	10.829	4.224	2.123	2.816	9.163
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		127	0	127			48.384	24.318	32.256	104.958	48.768	24.511	32.512	105.791
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	7/13/2022	20	22	-2			2.76	1.38	1.84	5.98	-0.276	-0.138	-0.184	-0.598
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							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	7/11/2022	98	39	59			37.632	18.914	25.088	81.634	22.656	11.387	15.104	49.147
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
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	5/23/2023	29	10	19			11.136	5.597	7.424	24.157	7.296	3.667	4.864	15.827
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	5/23/2023	29	10	19			11.136	5.597	7.424	24.157	7.296	3.667	4.864	15.827
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	5/23/2023	29	10	19			11.136	5.597	7.424	24.157	7.296	3.667	4.864	15.827
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
												78280	**29244**	**50,003**			**22903.39**	**11475.2**	**15211.54**	**49590.12**	**13980.394**	**7013.275**	**9326.001**	**30319.67**

CABARRUS COUNTY

BOARD OF COMMISSIONERS
REGULAR MEETING

June 19, 2023
6:30 PM

AGENDA CATEGORY:
Reports

SUBJECT:
EDC - May 2023 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:

ATTACHMENTS:

- Report

Project Activity Report

MAY 2023

Current Active Projects
44

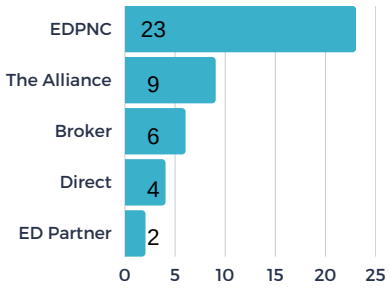
Projects Added in May
8

STATS OVER THE PAST MONTH

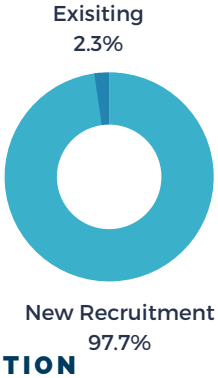
The EDC received 19 new projects/RFIs (request for information) in May and submitted sites/buildings for 8 of the new requests. There was 1 client/consultant site visit or meeting in May.

Project Activity Highlights

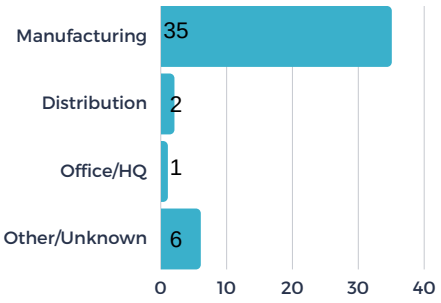
PROJECTS BY SOURCE



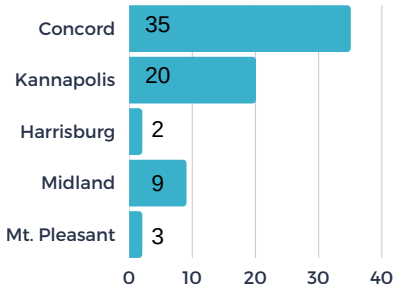
PROJECTS BY TYPE



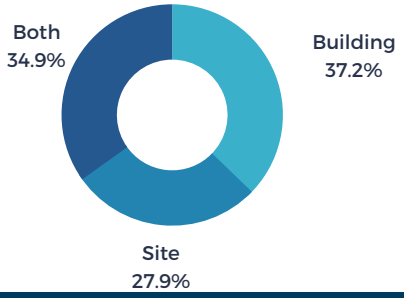
PROJECTS BY INDUSTRY



OF PROJECTS BY LOCATION



BUILDINGS VS. SITE - %



262
average jobs per project

$188M
average investment per project

139K
average square feet per project

30
average acres per project

34%
of Cabarrus EDC's projects involved companies outside of the U.S.

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