

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

1. CALL TO ORDER - CHAIRMAN

2. APPROVAL OF WORK SESSION AGENDA - CHAIRMAN

2.1. BOC - Changes to the Agenda Pg. 3

3. COMMISSIONER AGENDA REQUESTS

3.1. BOC - Public Comment Discussion Pg. 5

4. DISCUSSION ITEMS - NO ACTION

4.1. County Manager - Provider Presentations for Arena & Events Center Pg. 6

4.2. Department of Human Services (DHS) - Transportation Disadvantaged Business Enterprise (DBE) Goal Pg. 241

4.3. Infrastructure and Asset Management -Camp T.N. Spencer Park Masterplan Discussion Pg. 251

4.4. Planning & Development - Plot Plan/Survey and School Planning Capacity Report Discussion Pg. 252

5. DISCUSSION ITEMS FOR ACTION

5.1. BOC - Appointments to Boards and Committees Pg. 253

5.2. County Manager - Easement for Duke Energy on Kannapolis Middle School Property Pg. 255

5.3. Department of Human Services - Approval of Medicaid Expansion Positions Pg. 261

5.4. Department of Human Services - Energy Programs Outreach Plan Pg. 273

5.5. Finance - Occupancy Tax Late Penalty Waiver Requests Pg. 278

5.6. Infrastructure and Asset Management -Cabarrus County Behavioral Health Center Project Update Pg. 280

5.7. Infrastructure and Asset Management -Vietnam Veterans Park Land Lease Amendment Pg. 281

5.8. Juvenile Crime Prevention Council - Allocation of FY 2023-24 Funding Pg. 286

5.9. Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 4040 Mills Circle, Further Identified as PIN 5651-14-2940 Pg. 289

5.10. Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 3868 Highway 200, Further Identified as PIN 5547-87-8632 Pg. 295

5.11. Legal - Central Area Land Use Plan Interlocal Agreement Update Pg. 302

5.12. Sheriff's Office - Acceptance of Governor's Highway Safety Program (GHSP) Grant Award Pg. 309

5.13. Sheriff's Office - Awarding of Service Weapon to Deputy Michael Elliott Upon his Retirement Pg. 328

5.14. Solid Waste - Landfill - Replacement of Landfill Compactor Pg. 332

5.15. Tax Administration - Tax Collector's Annual Settlement and Order Authorizing Collection of FY 2023-2024 Taxes Pg. 343

6. APPROVAL OF REGULAR MEETING AGENDA

6.1. BOC - Approval of Regular Meeting Agenda Pg. 348

7. ADJOURN

In accordance with ADA regulations, anyone in need of an accommodation to participate in the meeting should notify the ADA coordinator at 704-920-2100 at least 48 hours prior to the meeting.

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Approval of Work Session Agenda - Chairman

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
July 10, 2023**

ADDITIONS:

Discussion Items for Action

- 5.5 Infrastructure and Asset Management – Cabarrus County Behavioral health Center Project Update
- 5.8 Juvenile Crime Prevention Council – Allocation of FY2023-24 Funding

UPDATED:

Discussion Items for Action

- 5.3 Department of Human Services - Approval of Medicaid Expansion Positions

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:
COMMISSIONER AGENDA REQUESTS

SUBJECT:
BOC - Public Comment Discussion

BRIEF SUMMARY:
Commissioner Measmer has requested a discussion to add a public comment opportunity to the July 10th Work Session, in light of current events.

REQUESTED ACTION:
Receive input.

EXPECTED LENGTH OF PRESENTATION:
5 Minutes

SUBMITTED BY:
Commissioner Chris Measmer

BUDGET AMENDMENT REQUIRED:
No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items - No Action

SUBJECT:

County Manager - Provider Presentations for Arena & Events Center

BRIEF SUMMARY:

A Request for Proposals (RFP) was issued on February 6, 2023 to obtain responses from parties interested in providing overall management of the Cabarrus Arena and Event Center. Two providers - ASM Global and The Sports Facilities Companies - submitted proposals by the April 28, 2023. Each company will present key highlights from their proposal to the board for consideration.

REQUESTED ACTION:

Receive input.

EXPECTED LENGTH OF PRESENTATION:

1 Hour or More

SUBMITTED BY:

Rodney Harris, Deputy County Manager

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▣ The Sports Facilities Companies RFP Response
- ▣ ASM Global RFP Response

THE SPORTS FACILITIES COMPANIES // SPORTS FACILITIES MANAGEMENT, LLC

THE SPORTS FACILITIES COMPANIES



CABARRUS COUNTY // REQUEST FOR PROPOSAL



MANAGEMENT SERVICES FOR CABARRUS ARENA & EVENTS CENTER

APRIL 28, 2023

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TRANSMITTAL LETTER

Dear Cabarrus County Selection Committee:

We are thrilled to present the Selection Committee with the enclosed information, including an overview of our scope, a glimpse into how we will approach the project and ultimately the differentiators that set us apart from other management companies in the industry. It is our sincere hope that this document is the first step toward a partnership that will bring an immediate impact to Cabarrus County and develop the region into a sports destination through innovative, strategic, and sustainable growth.

Since 2003, our mission has been *“to improve the health and the economic vitality of the communities we serve”*, and that mission is our commitment to Cabarrus County. We hope that with this submission, you will learn more about our experience, breadth, team, and purpose-driven approach differentiating us as your best partner for transitioning the focus of the Cabarrus Arena & Events Center. That said, I prefer to begin this letter more focused on what we will accomplish together and why you can have confidence in Sports Facilities Companies to deliver:

1. Economic Development. SFC will immediately put Cabarrus County on the regional and national sports tourism scene. We will utilize SFC's already existing national media reach to create a campaign for the market and upgraded facilities. In addition, Cabarrus County will join the industry's Largest Network of Events led by the longest running management team in the industry. Our managed venues (www.thesfnetwork.com) currently produce more than \$285M in overnight hotel stays annually with more than \$500M forecasted for year-end 2022. As part of the network, Cabarrus will immediately be put in front the biggest brands and the best events in the industry. With the shift to a sports tourism focus and under SFC management, the facility will drive larger events, attract a higher caliber consumer, and drive visitation from a larger radius. Ultimately for the County, this means faster fill rates and greater amounts of direct spending, economic impact and hotel room nights.

2. Increased Local Opportunities. In partnership with Cabarrus County, we will create opportunities for local residents and partners to engage in the facility. While tourism and economic impact is at the forefront of the project, these types of venues will not be successful without local engagement, opportunity and buy-in. We will work immediately to identify local organizations and user groups that can benefit from activation within the facility and then develop in-house programming to cover any needs or gaps. Our team stands prepared to develop all local programming in-house if necessary/requested and has experience ranging from league development to full community parks and recreation partnership. Not only do we understand how important these facilities and programs are to the local community; we also understand how to properly market and operate them in order to maximize participation.

3. Operational Efficiency. With SFC, you are securing a proven partner. We operate the highest performing sports tourism assets in the country and pride ourselves on building great relationships with public leadership, officials, and staff. We are purpose-built for public engagements as attested by our multiple references, portfolio, and proven track record of performance. Immediately at your disposal, the County will be provided with a professional team comprised of marketing, sales, HR, legal, risk management, accounting, and development experts with a background in sports and entertainment assets. This experience provides the ability to drive revenue and maximize efficiencies - ultimately leading to an improved operational bottom line at the facility.

On behalf of our 1800+ SFC team members, we are ready and excited to explore this opportunity with Cabarrus County. With our team, we believe through this transition, the Cabarrus Arena & Events Center can spur economic development, drive record breaking economic impact, maximize operational sustainability, and cement its place as an incredible resource for the quality of life for your community. This is not a dream, but a vision cast by a fully capable team with the proven ability to create these types of venues and experiences around the country.

We hope our services proposal resonates with you and your team and the detail included provides enthusiasm for meeting the SFC team! We are passionate about the impact these types of facilities make in communities. We are eager to contribute to the quality of life and quantity of economic impact in Cabarrus County! Thank you for the consideration and if given the opportunity, we will serve you well!

Sincerely,



JASON CLEMENT | CEO AND FOUNDER
C: 727.474.3845
jclement@sportsfacilities.com



JIM ARNOLD | PARTNER
C: 404.984.6682
jarnold@sportsfacilities.com



EXECUTIVE SUMMARY

FIRM OVERVIEW

PLAN & FUND

SPORTS FACILITIES ADVISORY

Founded in 2003, we have served more than 2,500 communities and assisted with more than \$10 billion in planned projects. Our plan-to-fund approach means we can deliver much more than the industry's leading research and financial forecast documents, we can deliver projects that are attractive to finance sources, capital partners, and municipal funding sources.

DEVELOP

SPORTS FACILITIES DEVELOPMENT

The services provided by the Development Team were born out of customer demand for better alignment between facility design and operations. Our owner's representation, procurement, and venue planning services not only achieve this goal by pairing proven operators with clients' design teams, but save money in procurement, reduce risk, and streamline the process for everyone involved.

PERFORM

SPORTS FACILITIES MANAGEMENT

Sports Facilities Management is the youth and amateur sports industry leader in outsourced facility management. We are purpose built to serve the goals and visions of our clients and produce results. We are the ultimate partner for clients who want to maintain control of their assets without the headaches, expense, and risk of daily operations. Our proven performance has led us to represent the SF Network, the largest and fastest growing network of sports and recreation facilities in the country.

YEARS IN OPERATION: 20 years

COMMUNITIES SERVED: 2,500+

MANAGEMENT CORE SERVICES:

- Start-Up Operational Development
- Facility Operations
- Operational Timelines
- Strategic Planning
- Revenue Generation Services
- Facility Optimization Services
- Project Finance Strategy

CORPORATE HEADQUARTERS:

600 Cleveland St, Suite 910
Clearwater, FL 33755

SOUGHT-AFTER RESOURCE TO:

- International City & County Manager's Association (ICMA)
- National Recreation & Parks Association (NRPA)
- Sports ETA (Sports Tourism)
- Aspen Institute Project Play 2024

NUMBER OF EMPLOYEES: 1800+

CORPORATE STRUCTURE:

Limited Liability Company (LLC)

CONTRACTING FIRM:

Sports Facilities Management, LLC

EXECUTIVE SUMMARY

OPERATIONS

- The Cabarrus Arena & Events Center is currently operating at a \$500,000+ loss
- Current operations are performing well with regards to revenue production
- The facility does not currently show any revenue associated with sponsorships or naming rights
- Current expenses are high in comparison to industry averages and based off of revenue production.
- Additional investment in marketing and advertising could potentially result in higher usage rights and further draw.

ECONOMIC IMPACT

- Based on mobile analytic data, the facility is currently drawing over 65% of visitors from the local area and 83% of their visitors from within the state of North Carolina. This positions the facility as a local-use venue by industry standards.
- A large percentage of visitors to the facility have consumer profiles not associated with high levels of disposable income.
- A majority of “Event Days” at the facility were filled by event types that do not historically drive large amounts of economic impact (meetings, consumer shows, and miscellaneous).

MARKET OPPORTUNITY

- SFC believes there is a clear opportunity to transition the arena and events center into a regional sports tourism destination
- The current facility floor plans could hold 7 basketball courts and 14 volleyball courts along with a family entertainment center that would support tournament programming and also provide a high-quality, local-use amenity.
- A focus on sports tourism could generate nearly 200,000 visits per year without affecting the ability to host many of the existing “Event Days” currently utilizing the facility as well as the Fair and related activities.

RESULTS

- ***Sports tourism events could generate over \$18M in additional direct spending and 42,000 room nights in the market.***
- ***SFC’s sports tourism focused operations could improve operational Net Income by \$400,000 - \$800,000 per year***

“ UNDER SFC'S LEADERSHIP, OUR FACILITIES HAVE ACHIEVED ALL BOTTOM LINE BUDGET OBJECTIVES FOR EACH FISCAL YEAR INCLUDING 2020 PANDEMIC YEAR ”

JOHN LYDA
CITY COUNCIL PRESIDENT
HOOVER, AL
HOOVER MET COMPLEX



OPERATIONAL PLAN

UNIQUELY CAPABLE

SFC's vision is to develop and manage the highest performing youth and amateur sport, recreation, wellness and entertainment facilities in the industry. You won't find a team more dedicated, passionate, and capable of producing extraordinary results than ours.

For 20 years and in more than 2,500 communities, Sports Facilities Companies have been a leading force in the growth of sports tourism in America. However, highest performing means so much more than simply tourism and event-driven programming. Over the next section of this response, we will highlight our experience and approach to put Cabarrus County on the sports tourism map while also delivering an incredible local programming asset to all residents, creating non-traditional events to truly turn the facilities into community-based gathering places.

OUR MISSION:
**TO IMPROVE THE HEALTH AND ECONOMIC VITALITY OF THE
COMMUNITIES WE SERVE.**

On the following pages we will highlight our approach to running successful venues across the country and fulfilling our mission to the Cabarrus County area.

- Administration
- Financial Management & Reporting
- Risk Management & Insurance
- Facility Operations, SOPs, Operational Systems
- Food & Beverage, Catering Options
- Merchandise
- Sponsorship
- Community Engagement
- SFC Marketing Approach
- Marketing & Event Promotion/Production
- Community Access to Sport
- Event Ticketing
- Hotel Booking



25 MILLION GUEST VISITS ANNUALLY

\$250 MILLION ECONOMIC IMPACT ANNUALLY

1800 + TEAM MEMBERS READY TO SERVE

COMMITMENT TO LOCAL PROGRAMS & RESIDENTS

SPORTS TOURISM FOCUSED OPERATIONS

APPROACH

As explored through this proposal, SFC believes there is an opportunity to reinvent the existing Arena & Events Center into a regional/national sports tourism destination. In order to accomplish this, there is a number of renovations and FF&E additions that would be necessary. As shown in this financial plan of this response, the financial performance will be greatly improved once the sports tourism pieces are in place.

If brought into manage the facility, SFC is confident in our ability to produce a better bottom-line performance with the current program in place through avenues explored in the operations and financial sections (primarily through cost management and a focus on sponsorship/naming rights sales).

During the first year of operations, SFC would also act as the Owner's Representative for the County and oversee the planning, design and installation of necessary renovations at the facility. As your owner's representative, SFC becomes an extension of your staff. Our qualified team will provide Cabarrus County with a direct line into how the project is developing as well as guidance, project management, and operating perspective along the way. As your partner, SFC will manage the design process and construction progress, ensuring the renovations come in on-time and on-budget. What sets SFC apart from other owner's representative service providers is our expertise in sport, recreation and

event operations. Our focus, dedication and proven track record of successful facility operations in concert with our development services, makes our team uniquely capable of providing the necessary services to convert the facility into a successful sports tourism destination on-time and on-budget while also ensuring long-term success through efficiency, marketability and operational sustainability.

During this same time period, SFC will develop a full re-branding and re-opening strategy for the venue as a sports tourism destination. This will include all marketing at a local, regional and national level to secure the events to fill the facility in advance of the first year of sports tourism operations.

Our vision is a completely re-invented and re-energized facility that will quickly become a local, regional and national sports and entertainment destination. We will immediately put Cabarrus County at the center of the industry's largest sports tourism network and thousands of event rights holders. The following pages will provide a high-level overview of our vision for the Cabarrus Arena & Event Center along with an early opinion of costs.

We are confident that there is an opportunity to create a new program within the walls of the existing venue that will enhance to health and economic viability of Cabarrus County while providing a tangible ROI for the County.



ADMINISTRATION

SFC has developed extensive resources with in-house expertise in finance, marketing, legal & risk, human resources, financial forecasting, event booking, and more. This team will support every aspect of Cabarrus Arena & Events Center, ensuring that we are able to attract the very best talent to the facilities and that the on-site staff is supported by the very best resources and tools to be successful in their jobs.

ONE TEAM, ONE NETWORK

People are the lifeblood of any organization, but it is never truer than in a sports, recreation, or events facility. Our People & Culture team is dedicated to ensuring all 1800+ SFC team members in the SF Network have the support, development, and leadership they need to be successful. We also manage the tactical and operational elements of traditional HR duties.

Our People & Culture team will provide:

- Recruiting/Talent Acquisition Services
- Document Resources including Employee Handbooks
- Benefits Management
- SFC Cultural Onboarding
- Ongoing Leadership Training & SFC Summits
- Staff Change Management
- Succession Planning

GROWTH & INNOVATION RESOURCES

SFC brings a culture of creativity and innovation. We create incentive for team members to share process improvement, ideas, best practices and celebrate those who excel in innovation. This includes technology, sponsorship partners, services, philanthropic initiatives, processes and programs. The sports and entertainment industry is evolving rapidly and SFC dedicates capital and human resources to keeping Cabarrus County at the forefront of service and guest experience.

STAFF ON-BOARDING

Along with in-person/on-site training, SFC utilizes an online on-boarding process that will introduce the team member to both the facility and the SF Network. As part of this system, SFC will work with Cabarrus County to develop venue specific training videos and messaging that will ensure the vision, processes and expectations of the County remain front and center. The goal of this process is to ensure that we find the right fit for each and every hire (full time and hourly), reducing turnover and minimizing costs.

STAFF TRAINING & DEVELOPMENT

SFC full-time facility staff have custom on-boarding plans and leadership training at our corporate headquarters in Clearwater, FL where they have access to our specialty support departments within their first month with SFC. For General Managers and select leadership staff, SFC also hosts on-site leadership training at our Spring GM Summit and the SFC Leadership Summit each fall. These events offer time for best practice sharing among all senior leadership in the SF Network as well as new policy roll-out, process/change review, best practices, inspirational speakers, and more tactical development sessions (e.g. booking best practices). Our corporate offices and subject matter experts also offer a variety of training and think tank sessions to collaborate on ways to innovate and improve processes. In addition, SFC hosts corporate-wide manager and account executive calls and meetings to encourage collaboration and idea sharing across our venues.



“WE WIN WITH PEOPLE. SUCCESS IN CABARRUS COUNTY STARTS WITH A GREAT TEAM. WE RECRUIT, TRAIN, AND DEVELOP OUR PEOPLE SO WE CAN DO EXTRAORDINARY THINGS WITH & FOR YOU.”

TAMI SWANSON
VP OF HUMAN RESOURCES

OPERATIONAL STANDARDS

With over 25 million guests visits to SF Network facilities, SFC knows that the guest experience can make - or break - a facility's success. In every SFC-managed facility, we recognize the importance of making a positive impact, understanding that a great experience not only leads to return visits, but also increased ROI for the facility.

TRACKING IMPACT

In addition to quantitative analysis captured through our on-site visitor tracking, SFC will also employ staff and intern teams throughout the year to survey participants and visitors in each area of the facility. This feedback will be used to help measure more qualitative impacts such as guest experience, customer service, quality of facilities, food quality, etc. It is the tracking of, and reaction to, guest experience performance that will ultimately give our collective team the opportunity to turn each and every visit to the Cabarrus Arena & Events Center into a positive experience, driving return visits and additional ROI.

SFC is not learning on the job - we provide this service in all of our managed venues and will immediately work with the Cabarrus Arena & Events Center to design custom reporting based on the facility's definitions of success. Moreover, SFC is the standard and trusted resource to the industry for creating benchmarking and KPI on facility operations. Our KPI reporting is designed to provide transparency to our partner facilities and offer up-to-date information on overall program, event, or membership success.

ANNUAL REPORT

SFC will deliver an annual report to Cabarrus County which will look at the overall success of the facility in all areas, including local activation and membership, event booking and creation, and financial performance. At the conclusion of this annual report, SFC will utilize the previous years' results to immediately start the process over again by working directly with Cabarrus County to create the following years' business plan.

YOUR GOALS ARE OUR GOALS

In this collaborative process, SFC and Cabarrus County will work to redefine the facility's definitions of success, revisit facility goals, and ensure that our SFC staff is focused on Cabarrus County's guiding principles and overall vision. Your goals are our goals and it is our commitment to ensure that, as the facility develops and grows, we consistently have an open line of communication with HSEA staff and stakeholders to not only meet, but exceed, expectations.



GUEST FIRST

SFC employs a company-wide Guest First policy and training to ensure all SFC employees provide the best service to anyone visiting our facilities. Company-wide, we have a 90% retention rate on tournaments and events that return year-after-year. This success stems from our ability to focus on providing the best possible guest experience to every person that visits our facilities.

To ensure that our Guest First policy is consistent across all venues, each SFC team member is introduced to Guest First training during on-boarding with our corporate People & Culture team on their first day of employment. In addition to the initial training, each venue hosts regular, venue-specific re-training to ensure Guest First is always front and center in daily operations

All SF Network venues are provided with signage to instill reminders about the importance of guest service and overall guest satisfaction.



OPERATING MANUAL

COMPLEX OPERATING MANUAL

Once selected we will work with Cabarrus County to develop a custom operating manual. Together, SFC and HSEA will determine at a minimum, the following:

- Hours of operation
- Food and beverage
- Standard operating procedures for facility and recreational staff
- Minimum maintenance standards and guidelines
- Quality assurance/quality control procedures
- Guidelines for merchandise/food and beverage sales
- Workflows for programming and registration
- Purchasing policies
- Miscellaneous

Once completed, Cabarrus County will own the Operating Manual.

A SAMPLE OF SFC'S OPERATING MANUAL IS AVAILABLE FOR REVIEW UPON REQUEST.

EMERGENCY TRAINING

Along with complex operating manuals and procedures, our teams actively train for emergency situations and are fully prepared to handle them when they arise. Our staff has dealt with missing children, active shooters, cardiac arrests, weather emergencies and a long laundry list of other situations. When it comes to these types of situations, Cabarrus County cannot afford to put the facility in the hands of operators who do not have this proven, hands-on experience.

ADDRESSING NEW CHALLENGES HEAD ON

COVID is not the first or the last challenge that will face the sports tourism industry. Throughout COVID, the industry looked to SFC for leadership and we responded by authoring and sharing COVID re-opening guidelines for our venues and provided to the industry at no charge. We applied for and received PPP and small business loans/grants for all of our venues and have come out of COVID stronger than how our venues went in.

Cabarrus County can be confident with SFC as your partner that you will be in the best position possible to address any situation that arises - whether a one-time occurrence or an entire shift to the industry.



“EVERY DAY IN FACILITY MANAGEMENT BRINGS NEW CHALLENGES FOR OUR STAFF. THROUGH PROPER PLANNING AND TRAINING WE CAN ASSURE OUR TEAM IS READY TO FACE CHALLENGES BIG AND SMALL.”

DAVE PRITCHETT
Chief Operating Officer



MAINTENANCE AND UPKEEP

STANDARD OPERATING PROCEDURES

In addition to general maintenance and housekeeping for the facility, SFC will develop standard operating procedures for facility-specific needs.

As a facility operator for over 35+ facilities, SFC recognizes there is not a one-size-fits-all approach to facility maintenance. As a result, the Account Executive and General Manager will work with Cabarrus County to ensure all facility areas, as well as an specialized equipment, have individualized SOPs for facility staff to use as a guideline for proper maintenance and upkeep.

Individual SOPs for Cabarrus Arena & Events Center may include, but not limited to:

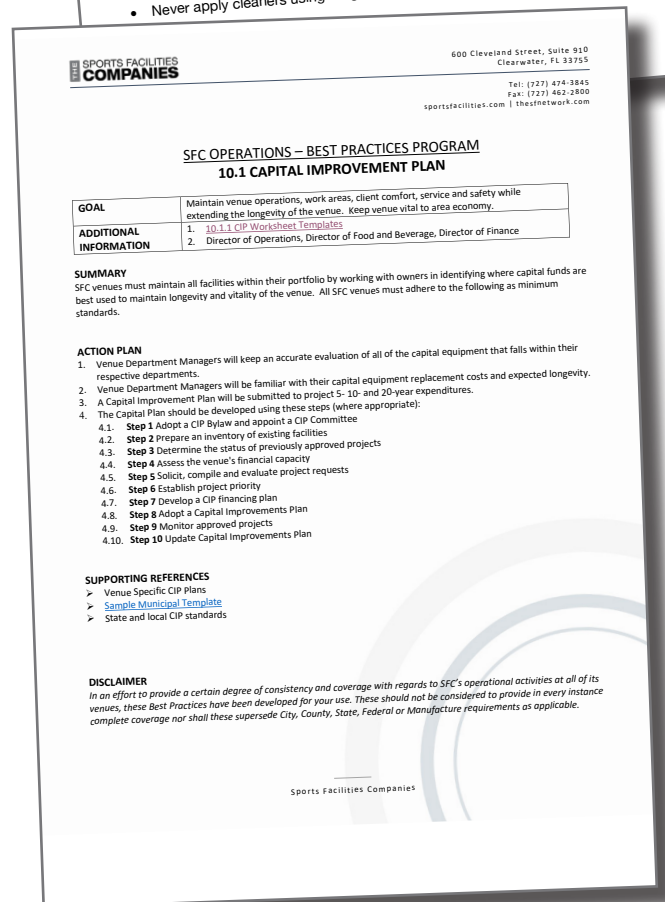
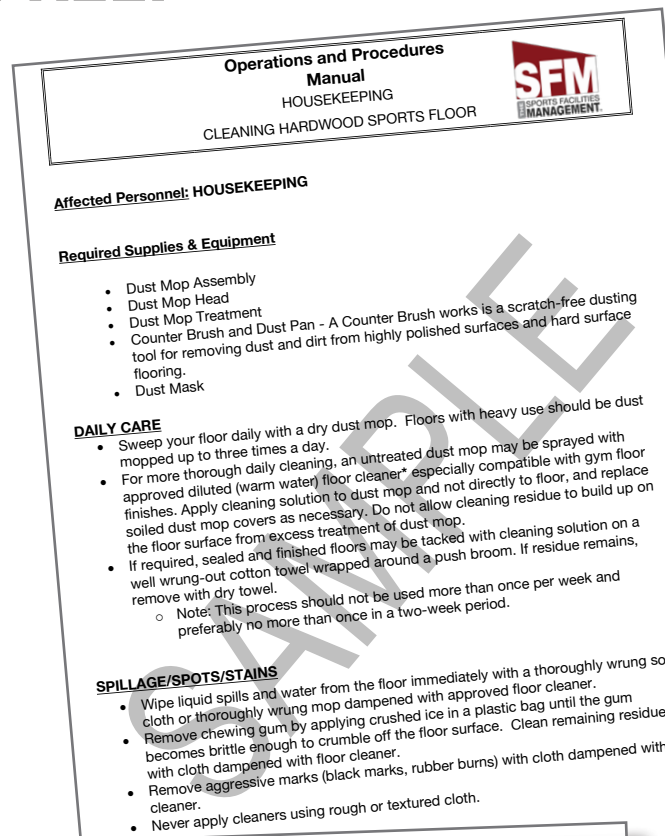
- General Office Equipment
- General Maintenance Equipment
- Hardwood Court Floor
- Floor Protection
- Scoreboard Operation
- Kitchen Equipment
- Events, Staffing Plans, Programming

CAPITAL IMPROVEMENT PLAN

SFC will work with Cabarrus County, facility employees, and other stakeholders to develop a Capital Improvement Plan that fits the needs and goals of the Cabarrus Arena & Events Center. This customized plan will include, but may not be limited to, the following categories:

- Life Safety/Code/ADA
- Maintenance
- Equipment Replacement
- Contractual Agreements
- Cost Savings
- Revenue Enhancing
- General

The General Manager and Department Supervisors will be responsible for maintaining an accurate evaluation of all materials and equipment, including capital replacement costs and expected lifespan. These findings will be projected in the facility pro forma's 5-, 10- and 15-year expenditures and built into the facility's annual budget after discussion with Cabarrus County.



SFC REVENUE LEVERS & PROFIT CENTERS

Regardless of the ultimate operations model created in partnership with Cabarrus Arena & Events Center, there will be a focus on driving economic impact, creating local use opportunities, improving quality of life, and ultimately driving success for the County. The following pages will highlight SFC's focus and expertise in a number of revenue areas as we lead the way in facility development and operational profitability.

FOOD & BEVERAGE

Concessions should be a major revenue source and we are confident that we can deliver successful Food & Beverage (F&B) through creative operations. SFC is at the cutting edge of food and beverage development in the youth sports industry. Our team has been behind many of the most recent trends that are creating record levels of per cap spending and facility ROI through innovative and creative offerings and outlet structures. Concessions rank highly among the most influential decision makers for families on whether they want to return to a facility. Incorrect pricing, poor quality and any number of issues can create an interaction that taints the overall tournament or event experience.

We will also explore the addition of new points of sale and creative food and beverage outlets throughout the two facilities. In SFC developed facilities, we have created everything from on-site grab-and-go convenience stores which minimize staff while increasing product offerings to self-operated and 3rd party food truck parks which provide call-to-action spending as well as a continually revolving menu throughout an event.

CREATIVE PROGRAMS & MARKETING

Concessions will never maximize themselves. SFC will implement programs and marketing that will drive people to our points of sale, put product in front of them throughout an event and create calls-to-action for guests to interact with our offerings. One simple implementation is by providing each and every guest with a food/drink coupon in return for their gate/admission payment. A free fountain drink or bottle of water has an incredibly low price, whereas increased foot traffic to a concession POS drives per cap and spending decisions.



DWELL TIME

The complex itself must create an environment that encourages people to stay and ultimately people want to stay in places where they feel comfortable and entertained. Creating a festive environment with things to do for all members of the family will be critical to the guest experience as well as keeping people, and their spending, on-site.

MENU OPTIONS

If you can create the environment where people want to be, the next step is providing a quality range of products that can appeal to the entire family. SFC will incorporate a wide variety of options that range from traditional ballpark fare to healthy sandwiches and salads in order to serve all ranges of preferences as well as providing the opportunity for the same guest to have multiple culinary experiences throughout an event. SFC will also work with local vendors and offerings that bring local flare to the venue from the community.

MERCHANDISE

While merchandise will never be the top performing revenue line at a facility, it is not something to be overlooked as a key revenue driver.

BRAND

There is an opportunity to take advantage of new branding and logo development that could lead to higher retail opportunities. This branding should connect all items including digital and on-site presence. We are proud of the brand that we helped the County create for the Cabarrus Arena & Events Center. We anticipate great success with facility branded apparel and merchandise!

CUSTOM APPAREL

SFC is working with each of our facilities to create a custom apparel shop that can take advantage of event specific apparel while also providing additional revenue opportunities through local leagues and teams. Custom apparel when matched with creative partnership alignment has the opportunity to drive six figures into the facility on an annual basis on its own.

PHOTOGRAPHY

Capturing memories is still a huge revenue opportunity and experience factor when families come to sporting events. SFC would immediately look into installing photography services for larger events with the ability sell everything from posters and calendars to key chains and mobile downloads. This is an easy-to-place opportunity that only enhance future operations and customer experience.

UNIQUE PARTNERSHIPS

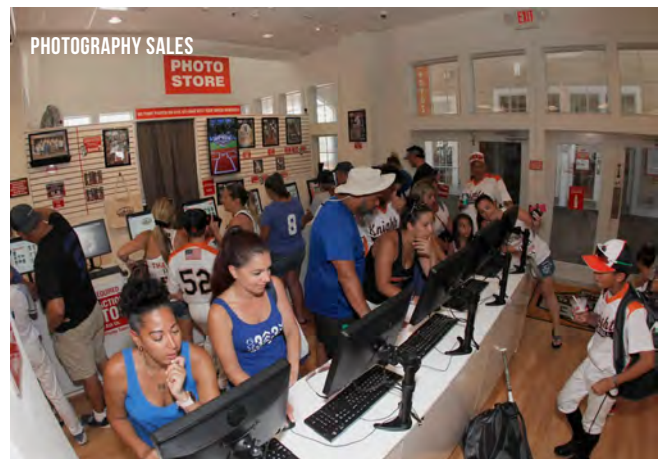
SFC searches out unique partnership opportunities at both a local and national level to add to our venues. When families are traveling for sporting events, they are prone to spend more money and make special purchases. SFC sees creative partnerships with companies such as Baseballism as a huge opportunity at sports facilities. Not only do brands such as this carry a "cool-factor" they also create the opportunity to capture additional revenue when guests inevitably hit the point where they don't want to spend more money with the facility itself.



FACILITY BRANDING



CUSTOM APPAREL



PHOTOGRAPHY SALES



BASEBALLISM RETAIL PARTNERSHIP - BRANSON, MO

SPONSORSHIP

SFC brings a unique perspective to maximizing sponsorship revenue and separates our focus into categories of local partnerships, and regional/national relationships.

LOCAL SPONSORSHIP

Local sponsorship is all about relationships, community engagement and boots on the ground. SFC purposefully builds and trains our venue staff to be actively engaged and seen within the community. We cultivate a wide array of sponsorship deals from entry level signage packages to on-site activation and engagement.

REGIONAL SPONSORSHIP

The regional sponsorship market is traditionally the sweet spot for large scale deals within youth sports complexes around the country. Our venue teams work directly with our regional account executives to identify potential sponsorship targets that share similar customer bases as well as drive-times/markets. Once identified, our network creates opportunities for initial conversations while our national marketing and branding team works with the venue to create strategic packages.

NATIONAL SPONSORSHIPS

Very few facilities have the true ability to tie into a national sponsorship deal with their customer base and struggle to secure any type of national footing in the sponsorship market. While we will not suggest relying on national sponsorship revenue, the ability for the facilities to tie into the SF Network will put Cabarrus County on the map as a destination, thus opening up the opportunity for national sponsorship reach.



**SPORTS FACILITIES COMPANIES HAS
SOLD EIGHT (8) NAMING RIGHTS
DEALS IN THE PAST 24 MONTHS.**

HOTEL BOOKING & TICKETING OPERATIONS

HOTEL BOOKING PLATFORM FOR EVENTS

SFC is prepared to provide a number of different turn-key lodging solutions that create the best outcome for visitors, hotels, the venue, and the County. For each event, post event recaps of results related to hotel bookings and revenues will be tracked and reported. SFC will collaborate with the County and local hotels to establish standards for cost controls in revenue share models for booked hotel rooms. In most markets within the SF Network, there is an average of \$5-15 of rebate and/or commission per booked hotel room to be negotiated between the event owner and venue. If a third-party housing company is used, their revenue per booked room night is traditionally capped at \$10. These standards will vary based on what the hotel market supports and will ensure the best rate options offered to visitors.

Hotel booking structure is not a one-size-fits all approach and is a decision we make at each venue in collaboration with our partners. Throughout our network we have facilities that:

- Work with third party booking companies
- Run hotel booking internally utilizing our own in house software
- Run hotel booking through our CVB partners
- Stay completely independent from hotel booking

TICKETING OPERATIONS

To achieve stronger financial performance and capture data of the visitors to the complex, SFC would look to implement a strategy that would standardize how tickets are purchased by visitors of the complex.

Our process for facilities hosting or operating ticketed events is to require the use of a dedicated ticket service for gate fees with the venue retaining a fee for each ticket sold. An example of this recognized revenue might be \$1 for every \$10 ticket, or \$2 for every ticket sold at more than \$20.

In addition to participating in ticket-based revenue, a ticketing system can provide valuable data and contact information for teams and visitors to be utilized prior to, during, and after events. This data can be used to promote coupons/deals and send notifications while on-site, as well as providing an opportunity to communicate with attendees to promote future programs/events/services after the event, as well as activation of sponsorships. SFC can offer an internal ticketing solution that can service all ticketing requirements.

Capabilities and advantages of the ticketing solution:

- Quickly and effortlessly check-in attendees with barcode readers or mobile phones
- Sell tickets online and deliver them digitally to buyers
- Presell admission, parking, food and beverage, merchandise and other amenities
- Collect valuable data on attendees
- Point of sale management and control
- Event promotion
- Sponsorship activation



COMMUNITY ACCESS TO SPORT

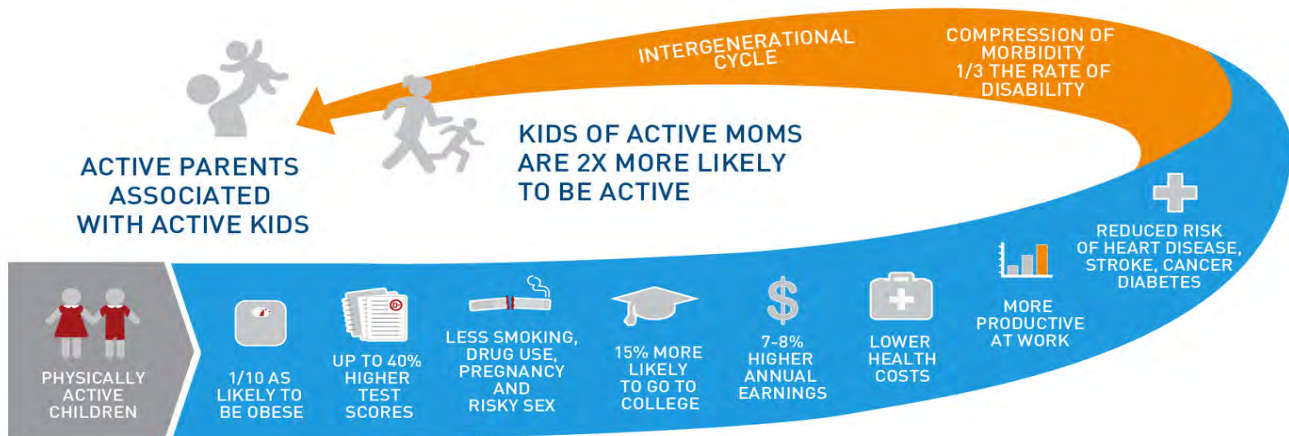
At SFC, we truly believe in the impact that our facilities have on our communities. Each and every one of our 1800+ employees has a story of how sports impacted their lives. It is critical to our mission to ensure that every resident in our communities have access to sports, regardless of age, ability, gender or income level. This is not a mantra we simply talk about, but one that we put into practice and one that we financially support across the industry, both inside and outside of our managed facilities.

SF ACCESS PROGRAM

The Access Program with SFC launched in Hoover, AL and Rocky Mount, NC in 2018. Our team is currently expanding this program across our entire network of facilities. The Access Program teams local sponsors with good-will marketing and branding opportunities to cover player registration fees and dues. All proceeds from the Access Program go to ensuring that kids within our communities who do not traditionally have access to sports are provided with the opportunity to participate within our venues. SFC will immediately institute our Access Program in Cabarrus County.

ASPEN INSTITUTE PROJECT PLAY

SFC is a proud partner of The Aspen Institute's Project Play. The Aspen Institute has often been referred to as the "conscience of youth sports." Project Play's mission is to develop, apply and share knowledge that helps build healthy communities through sports. The program identifies gaps in sports access and works with leading organizations such as SFC. Together, we can fill the gaps so that every child in America can access sports, regardless of zip code or ability.



EARLY CHILDHOOD

ADOLESCENCE

ADULTHOOD

QUALITY CONTROL

YOUR GOALS ARE OUR GOALS

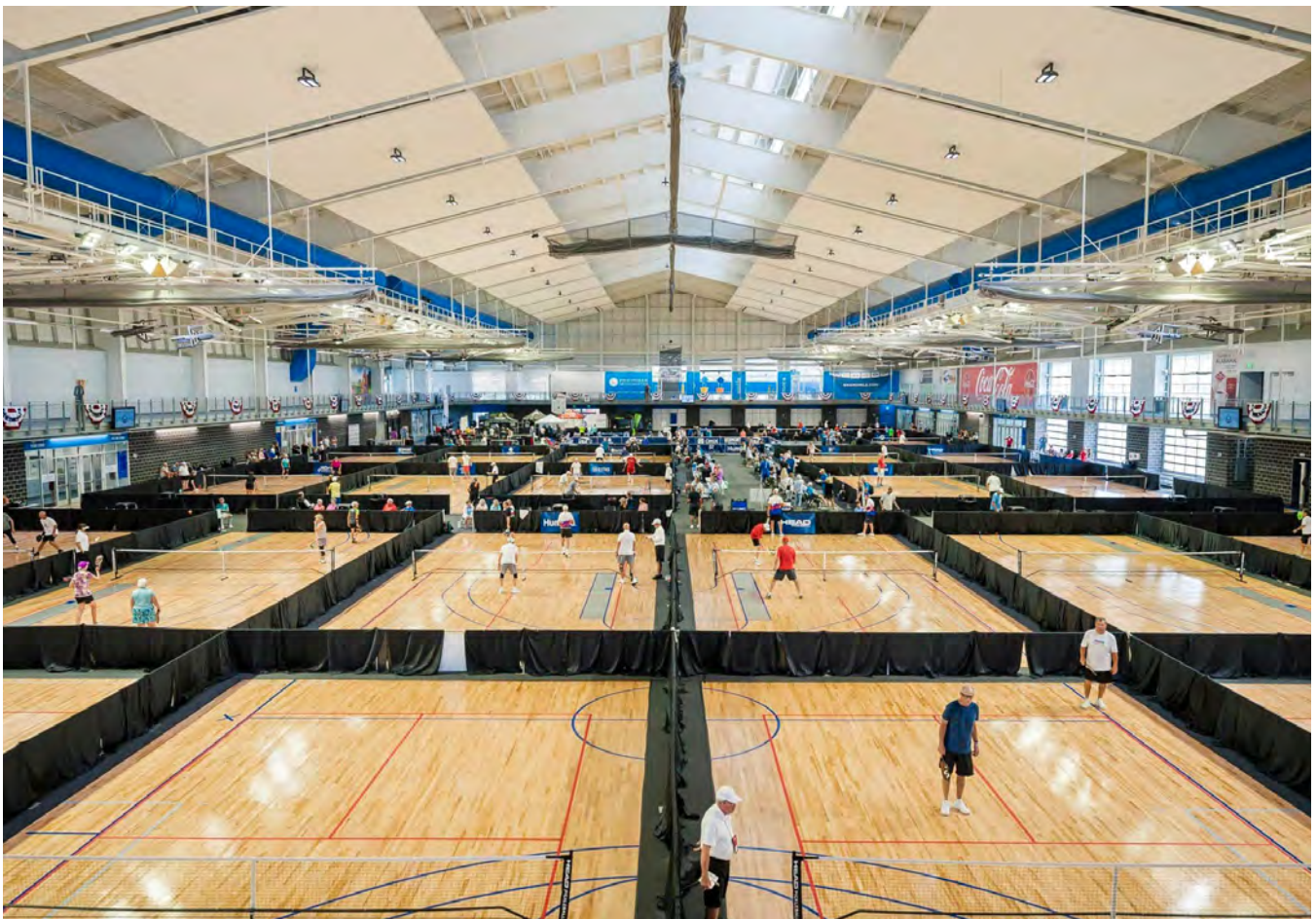
This project is a huge investment for Cabarrus County and we do not take our responsibility to perform lightly. At every step of the process - from the first kick-off call to Grand Re-Opening and beyond - your goals are our goals and will work to ensure our focus remains on you. Part of this focus is ensuring the best possible service to Cabarrus County, your staff, and the future users of the facility.

For the entire Concept-to-Concrete process, SFC will assign a Principal-in-Charge to ensure the project moves smoothly through each of the development phases. This constant leadership ensures that there are no missed hand-offs between phases and no dropped balls. It ensures that communication, quality, and service remain at the same level throughout the entire project. In each phase of the project, SFC will assign an executive level team member who will lead organization, communication, scheduling, strategy, and quality control throughout their respective phase/expertise. In partnership

with the client, the Principal-in-Charge and the Phase leader will manage all necessary project resources, which is often comprised of dozens of team members dedicated to fulfilling the necessary scope of work. This leadership approach ensures that we have consistency across our services, a primary project lead point of contact, and a specialty expert focused on each phase.

On the technical side of organization and communication, we provide working project timelines and weekly updates (at a minimum) to ensure that Cabarrus County is constantly aware progress and areas of focus. We will work with Cabarrus County to outline and deliver on the organization and communication plan that works for you and your staff, adapting as necessary to ensure that our processes are reflective of your communications strategies and expectations.

Listed on the following page is our management transition timeline to showcase how SFC will work alongside Cabarrus County to ensure a seamless transition.



MANAGEMENT TRANSITION TIMELINE

FIRST 30 DAYS

- 1. Immediate (48 Hrs) - Introductory Web Call**
 - a. Introductions
 - b. Clients introduce facilities to SFC Team
 - c. Transition expectations
 - d. Schedule in market “kickoff meeting” - discussion & goals
- 2. In Market Operations Kickoff (Week 2/3)**
 - c. SFC inquiry – learn history and goals of each location
 - d. Introduction to SFC Operations
 - e. Key Performance Indicators (KPI's) & financial history review
 - f. Interview staff
- 3. Pre In-Market Kickoff Work - Ongoing**
- 4. Programming Evaluation**
 - a. Membership
 - b. Local programming - camps, leagues, classes, clinics, etc.
 - c. Tournaments / events (sport and non-sport)
 - d. Parties & entertainment
 - e. Rentals
 - f. Corporate partnerships
 - g. Other Services (i.e., study hall, childcare, etc.)
- 5. Revenue, Expenses, Margins Review**
 - a. All revenue streams (i.e., programming, sponsor, F&B, membership, etc.)
 - b. COGS vs Expenses
 - c. Margins & profit
- 6. Marketing Assessment**
 - a. Brand
 - b. Website
 - c. Digital
 - d. Social
- 7. Partnerships & Relationships**
 - a. Corporate
 - b. Municipal
 - c. Community
 - d. Vendor
 - e. Industry
- 8. Facilities & FFE Review**
 - a. Facilities condition assessment
 - b. Maintenance review (service history, contracts)
 - c. FFE condition review

- 9. Business Disciplines Review - Standard Operating Procedures (SOPs)**
 - a. Operations
 - b. Marketing
 - c. Programming
 - d. Finance
 - e. Safety / Risk Mgt
 - f. Legal
 - g. Human Resources / Training
 - h. Systems
- 10. Systemic Infrastructure Review**
- 11. Financial Management – Accounting & Bookkeeping, Capital Plan, Banking, Etc.**
- 12. Legal – Current Contracts, Entity Structure, Insurance (Property, Liability, Work Comp), Etc.**

DAYS 31 - 45

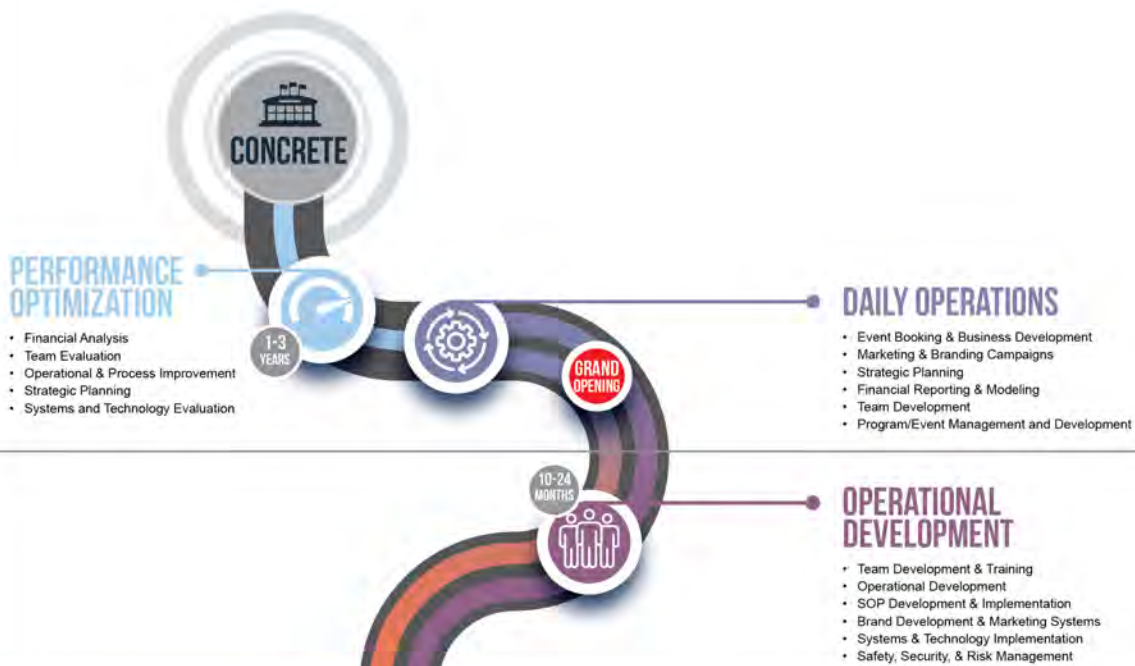
- 1. SFC will provide Client recommendations for all areas of business operations**
- 2. SFC will present Client a full action plan for transition of operations**

DAYS 45+

- 1. SFC will provide management and oversight of facility operation teams with support on a weekly and monthly basis at the Ownership level, GM/ Director level, and management-level staff.**
 - b. Lead weekly management calls for business development & operations with the Client
 - c. Participate in “Monthly Executive Review” meetings (facilities performance review)
 - d. Facilitation of an Annual Business Plan for Cabarrus County utilizing input and current research from SFC regarding current trends in the market and industry
 - e. SFC assist in creating a budget, business plan, and marketing action plans
 - f. SFC will provide regular support where needed, including supplier recommendation, new software or any other services that may assist facility operations

CONCEPT TO CONCRETE SERVICES

MANAGEMENT SERVICES



DEVELOPMENT SERVICES

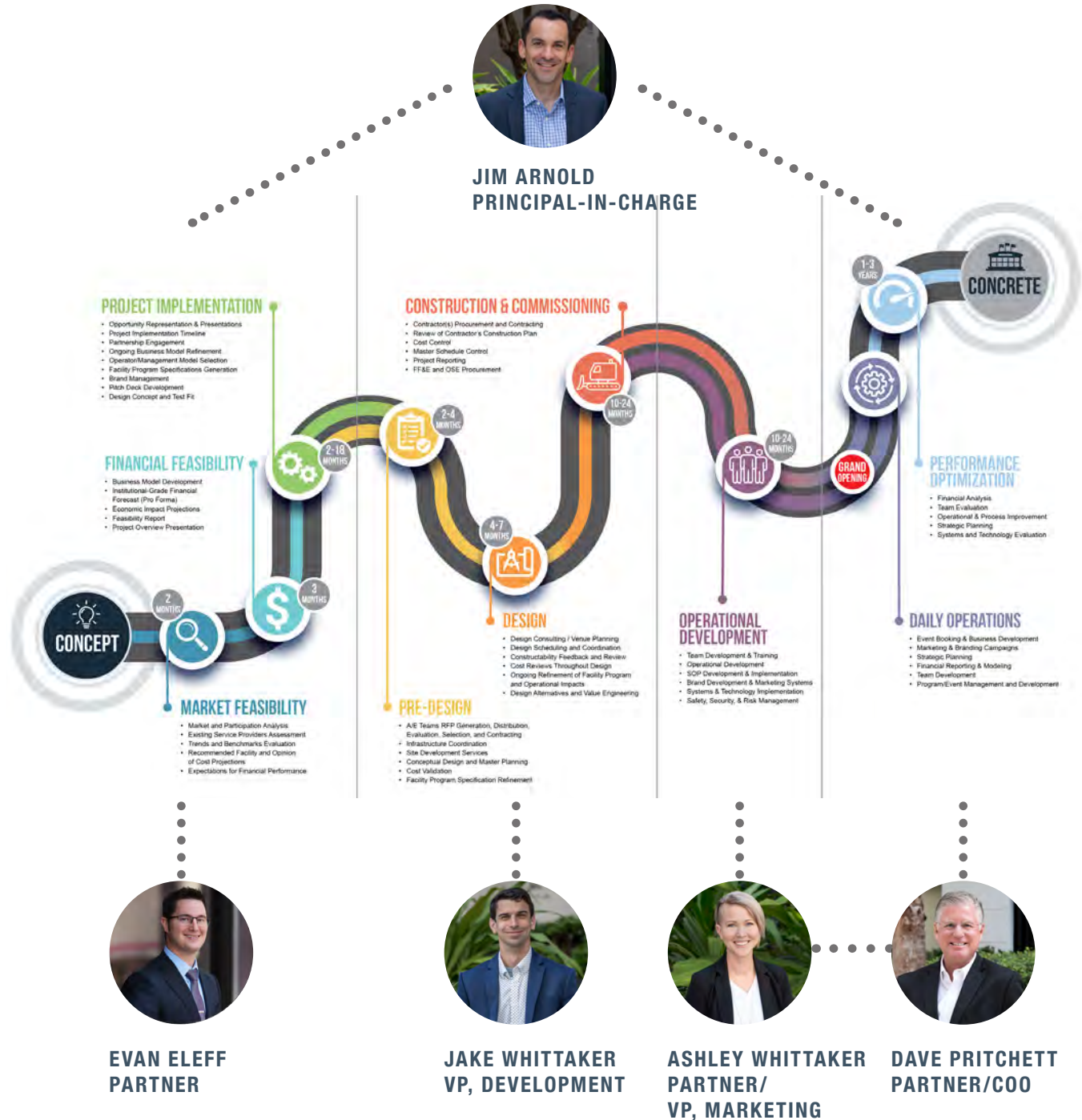


ADVISORY - SERVICES



PROJECT ORGANIZATION CHART

With the largest back-of-house team in the industry, SFC's Concept to Concrete process is led by an experienced team that has guided the creation of many of the nation's most successful sports tourism and recreation venues. Our team includes financial analysts, facility operators, architects, construction professionals, creatives, and a host of talented people that offer their expertise at each phase of venue development. SFC will not only provide a Principal-in-Charge that will lead the Cabarrus County effort, but each of the phases will be led by industry experts and a dedicated team.





Under Jason's leadership, the SF Companies have opened more successful sports and recreation venues than any organization in the country. As an experienced advisor he has provided planning, strategy, finance, and operational leadership to projects throughout the world.

CEO & FOUNDER JASON CLEMENT

SPECIALTIES:

SFC leadership and oversight,
long-term strategic direction, partnership
management

YEARS IN INDUSTRY: 21

The Sports Facilities' firms have become globally recognized leaders focusing on transforming the health and economic vitality of communities around the world. As the Chief Executive Officer of SFC, Jason leads the strategic direction, culture, and service standards that define SFC in the public sector and private sector markets we serve.

Under Jason's leadership, SF Companies recently launched new products to serve communities focused on economic development and the youth and amateur sports industry. The initiatives include an event company, new technology platforms, food & beverage and gaming options. The firm is also focused on merchandising, purchasing, and leveraging social capital to improve access to sport. Formally trained and licensed as an architect, Jason began his career in sports architecture before transitioning into commercial development and corporate real estate management. The experience was the spark to bring similar professional management services to the youth & amateur sports industry.

Jason is a passionate and faith driven contributor to causes that positively impact families and communities. He has founded, supported, and lead the growth as board chair to multiple organizations including Habitat for Humanity, Man Up and Go, Calvary Christian High School, Florida Small Business Development Center, and others.

NOTEWORTHY MEMBERSHIPS, ACCREDITATIONS, & ACHIEVEMENTS

ICMA - Strategic Partner & Speaker

NRPA - Speaker

SportsETA - Featured Speaker & Content Contributor

Board Chair - Habitat for Humanity, Man Up & Go

Tampa Bay Business Journal "Hall of Fame"

NOTABLE PROJECTS

Aviator Sports & Events Center-Brooklyn NY Hoover Met Complex - Hoover, AL

Pelican Bay Aquatic Center-Edmond, OK Spooky Nook Sports - Lancaster, PA

Salvation Army KROC Center-South Bend IN Eugene Civic Alliance - Eugene OR

The HUB Recreation Center-Marion, IL Panama City Beach Sports Park - PCB, FL

Sand Mountain Park-Albertville, AL Paradise Coast Sports Complex - Naples, FL



Jim is widely recognized as one of the leading designers and developers of youth sports complexes in the United States. In his role as the National Business Development Director, Jim Arnold leads the expansion of the SF Network of sports and recreation destinations across the country.

NATIONAL DIRECTOR OF BUSINESS DEVELOPMENT

**JIM
ARNOLD**

SPECIALTIES:

business development, program
planning, experiential design, sustainability

YEARS IN INDUSTRY: 20

EDUCATION

St. Bonaventure University
MBA-International Business

With over 20 years of experience in the industry, Jim has overseen the planning, design, development, and operations of many of the most innovative and successful facilities in the country.

Notable has been his role in the development and growth of two of the largest brands in youth sports, Ripken Baseball and Sports Force Parks. As part of this role, Jim was instrumental in developing the company's youth facilities from one park to three, with the additions of the Ripken Experience Myrtle Beach and the Ripken Experience Pigeon Forge. Jim's projects are highly regarded for their ability to drive profitability throughout creative design and self-operations.

While his career has been focused primarily on youth sports facility development, Jim has been involved in projects that touch all levels of sports across the world. From his role in the design of SRP Park (2018 Minor League Baseball Ballpark of the Year) to overseeing the development of a country-wide growth and development strategy for New Zealand Baseball; his experience across the sports landscape has an influential role in helping clients develop the most innovative, unique and sustainable sports facilities in the industry.

NOTEWORTHY MEMBERSHIPS, ACCREDITATIONS, & ACHIEVEMENTS

2019 Connect Sports Game Changer

Baltimore's 35 Under 35

MILB Stadium of the Year

Champion of Economic Impact

NOTABLE PROJECTS

Ripken Experience, Myrtle Beach, SC

Ripken Experience, Pigeon Forge, TN

Ripken Experience, Aberdeen, MD

Panama City Beach Sports Complex, PCB, FL

Cornerstone Park, Starkville, MS

Paradise Coast Sports Complex, Naples, FL

Rocky Top Sports World, Gatlinburg, TN

Launch Pad Sports, Cocoa Beach, FL

Cedar Point Sports Center, Sandusky, OH

Ballparks of America, Branson, MO

Elizabethtown Sports Park, Etown, KY

UTPB Sports Park, Odessa, TX

Cyclone Ballparks, Pecos, TX

Vicksburg on the Mississippi, Vicksburg, MS

ANALYTICS TEAM



DEPARTMENT HEAD
FINANCIAL FORECAST
& ANALYSIS

EVAN
ELEFF

PROJECT ROLE:
financial forecasting, budget
creation, program plan
optimization

Our financial forecast and analysis team will provide Cabarrus County with the expertise, experience, and real-world data necessary to understand how successful venues are planned as well as the guidance needed to generate better results, overcome operational challenges, and maximize marketing and business development opportunities.

Experts in financial forecasts and strategic plans, reports and communication policies as well as attend on-site user group meetings, staff engagement interviews, and oversight/client interviews.

KEY CAPABILITIES

- Financial Forecasting
- Economic Impact Calculations
- Market Research & Analysis



DAN MORTON,
DIRECTOR OF RESEARCH
& ANALYSIS



KEVIN SCHUH
ACCOUNT EXECUTIVE



SUZY FISHER REEDER,
ACCOUNT EXECUTIVE



RYAN SCHMIDTKE,
BUSINESS WRITER



KALIEGH HINCMAN,
PROJECT MANAGER



NIC FRAME,
BUSINESS ANALYST

DEVELOPMENT TEAM



DEPARTMENT HEAD
DEVELOPMENT

JAKE
WHITTAKER

PROJECT ROLE:
venue planning & procurement
management, design efficiencies,
vendor relations

Our qualified development team will partner with Cabarrus County to review the vision, financial forecasts and business plan, programming and space requirements, provide an initial design and project schedule review for future phases. SFC will provide not only a direct line into how the project is developing, but guidance, project management, and operating perspective along the way.

Our team uses real-world operational expertise and access to the leading sports facility planning firm in the country, our design and project management principles are centered around creating facilities that are operationally efficient, meets the project's and community's unique goals, and is in line with the original project vision.

KEY CAPABILITIES

- FFE/OSE Procurement
- Vendor Engagement / Resolution
- Venue Planning Services
- Owner's Representation Services



KEVIN GREENE
PROJECT EXECUTIVE



MIKE MAYS,
PROJECT MANAGER



JOHN WOLFE
PROJECT EXECUTIVE



DYLAN LOWDERMILK,
PROJECT MANAGER



ISHAN PATEL
PROJECT COORDINATOR

MARKETING TEAM



**DEPARTMENT HEAD
MARKETING & BRAND
DEVELOPMENT**

**ASHLEY
WHITTAKER**

PROJECT ROLE:
marketing strategy, brand development,
& business development

Our marketing and brand development team will innovate and develop new systems specific to your facilities. This effort will include regional and national press releases, proper budgeting for bid fees (minimal when necessary), and hosting of visits in partnership with the Cabarrus County.

SFC completes detailed plans that include deployment of proven digital, social media, direct sales, and other marketing systems. Furthermore, marketing plans include digital and social media, public relations, hard hat tours, and key stakeholder meetings. This step is highly collaborative with local partners and local recreation or CVBs.

KEY CAPABILITIES

- Annual Marketing Plan & Strategy
- Co-op Marketing Opportunities
- Sponsorship Sales
- Facility Branding / Internal Cross-Marketing
- Event Creation / Support
- Graphic Design Support



**KATRINA SALITROS
PROJECT MANAGER**



**ALI YENCHICK
CONTENT MANAGER**



**CRISTINA MCCOLLUM
EVENTS MANAGER**



**TRISTAN MAKAROFF,
SR GRAPHIC DESIGNER**



**STEPHEN SHAFII
DIGITAL MARKETING MGR**



**MAKENNA PARKS,
GRAPHIC DESIGNER**

HUMAN RESOURCES TEAM



DEPARTMENT HEAD
HUMAN RESOURCES

TAMI
SWANSON

PROJECT ROLE:
talent acquisition, employee
performance oversight, professional
development

Our HR team with work with Cabarrus County for sourcing, hiring, and placement of the leadership team and all hourly staff with clear job responsibilities and training. This process will be outlined in the hire and placement dates outlined in the operating/financial plan.

SFC's Human Resource team has recruited, hired, and trained successful leadership staff in 40+ venues across the SF Network. Our team develops and activates brand and marketing systems for HR, legal, risk, finance, maintenance, and other key systems the Client identifies.

KEY CAPABILITIES

- Recruiting & Talent Development
- Staff Training / Performance Management
- Culture Building / Values
- Benefits Administration



CAITLYN ALBERTS
HR BUSINESS PARTNER



CARLY BEAULIEU
HR ASSISTANT



REBECCA MURRAY
HR COORDINATOR



MICHELLE YBARRA
HR COORDINATOR

FINANCE TEAM



DEPARTMENT HEAD
FINANCE

BOB
STOUT

PROJECT ROLE:
financial forecasting, budget creation,
risk management

Our accounting team will partner with the Cabarrus County for a monthly top-to-bottom review of the operation including a line item review of “Budget vs. Actual” results. This “variance” process drives performance and accountability while providing your team with the expertise and resources of SFC advisors.

Our team reduces overhead through customized reporting based on client standards. We complete pace-to-goal sessions as well as a month to month performance report.

KEY CAPABILITIES

- Monthly BVA Reporting
- Financial Analysis & Bookkeeping
- Annual Budget Creation/Management



KYLE MOLINE
CONTROLLER



DENIS KIBBY
VENUE CONTROLLER



JENNIFER MARTIN
PAYROLL & BENEFITS



CHRISTY PHLIEGER
REGIONAL FINANCE MGR

OPERATIONS TEAM



DEPARTMENT HEAD VENUE OPERATIONS

MIKE
KELLY

PROJECT ROLE:
operational development, executive
strategy implementation

Our operations team will provide a service model that includes reporting to Cabarrus County with full transparency and control. We provide guidance on all things involving the day-to-day oversight of all aspects of the venue. We will be a extension of your team to serve Cabarrus County, the surrounding community, and guests.

Our Team executes tasks and processes so that facilities open on-time, on-budget, and on-brand. We will report weekly, monthly, and annually on progress in each area as needed. SFC representatives will meet with the team and other key stakeholder representatives through an agreed upon schedule of weekly and monthly meetings.

KEY CAPABILITIES

- Staff Management / Team Development
- Venue Leadership
- Technology Integration & Expansion



JOHN SPARKS
VP, ACCOUNT MGMT



JACK ADAMS
VP, SPORTS & ENTERTAINMENT



LORI MOORE
ACCOUNT EXECUTIVE



WES HALL
ACCOUNT EXECUTIVE



JESS KUHL
ACCOUNT EXECUTIVE



TODD YANCEY
ACCOUNT EXECUTIVE

EVENTS & PROGRAMMING TEAM



DEPARTMENT HEAD
VENUE OPERATIONS

DAVE
PRITCHETT

PROJECT ROLE:
event oversight, programming
development

Our events and programming team work with Cabarrus County to drive impact through successful development and execution of events and programming. From SFC event brands to national event organizers, our team will support the facility to maximize economic impact by bringing the biggest events and best programming to the facility

Our team leverages our relationships with thousands of events rights holders to maximize ROI, fill the calendar with impactful events, and provide industry-leading programming to venues across the SF Network. Additionally, the team works with municipalities, CVBs and hotels partners to encourage team booking and driving profitability back to the venue.

KEY CAPABILITIES

- Event Management
- Programming Development
- Additional Revenue Levers



DONALD ENGSTROM
DIR, PROGRAMMING



BRIANA PADRON
EVENTS MANAGER



BRITTANY SHERMAN
CUST SERVICE COORD.



CRISTINA VINCENTE
EVENTS MANAGER



WHITNEY HOLLAND
CUST SERVICE COORD.

SAMPLE FINANCIAL REPORT

SF SPORTS FACILITIES
MANAGEMENTTM



July 2022 Report



LETTER OF INTRODUCTION

August 24, 2022

[REDACTED]
[REDACTED]
[REDACTED]

Reference: [REDACTED] – Owner's Report – July 2022

Dear [REDACTED]

In accordance with our Management Agreement, please find the month of July 2022 Owner's Report for the [REDACTED]. This report is subject to the assumptions and limiting conditions of our contract and is intended for the use and benefit of the [REDACTED]. This report will serve as the basis for monitoring and modifying business plan objectives to improve facility and financial performance.

Regards,

[REDACTED]

[REDACTED]

[REDACTED]

Sports Facilities Management

[REDACTED]

[REDACTED]

EXECUTIVE SUMMARY

MONTHLY

- ✓ July 2022 revenues totaled \$370,849.57, against a total budget of \$378,500.
- ✓ Cost of Goods Sold came in under budget by \$20,335.2
- ✓ Expenses were budgeted at \$154,876.26.00 for the month with an actual total of \$159,969.48 resulting in a variance of (\$5093.22).
- ✓ The P&L reflects net operating income over budget by \$7,591.64

- ✓ 'Field Revenue' exceeded budget by 33.21% as a direct result of more events showing interest in the facility.
- ✓ 'Other Revenue' missed budget by (\$23,744), which is due [REDACTED] sponsorship agreement not coming online, which also impacted 'Other Costs of Goods Sold'. [REDACTED] budgeted in July but was recorded in June.
- ✓ 'Cost of Labor Wages' and 'F&B COGS' were a result of additional field [REDACTED] that were rented as well as taking advantage of the in-kind sponsorships within Food & beverage sectors. It is expected that the % COGS will normalize back to the 45% - 55% range within the coming months.
- ✓ We did not anticipate having the "Pro-Shop" open for events in July - however staff were able to create "Pop-Up" merchandise areas during events- creating an increase over budget of \$3,208.50
- ✓ 'General Administrative Expenses' exceeded budget due to GM trip to Clearwater FL for onboarding.
- ✓ 'Supplies and Services' Expense was kept lower than budgeted due to more rental events vs. in-house events
- ✓ 'Repairs and Maintenance' controlled their expenses due to field rental vs event revenue - leading to less foot traffic and wear/tear in common areas

- ✓ Current YTD revenues totaled \$370,849.7 vs PY of \$239,251.75, a increase of \$131,597.82
- ✓ YTD Cost of Goods sold is \$125,414 compared to PY of \$105,549.
- ✓ YTD Expenses are \$159,969.48, an increase of 27.8% over PY expenses of \$1125,171. Expense control was a direct result of programming revenues being driven by field rental vs. self-operated events.
- ✓ Current YTD Net Income is \$85,465.38 vs PY Net Income of \$8,530.83

July 2022 Reporting

APPENDIX I: MONTHLY FINANCIALS – BUDGET VS ACTUAL

	Actual	Budget	over Budget	% of Budget
Income				
40800 Recreational Programs - Youth & Adult		-	-	
41100 Field Revenue	86,589 00	65,000 00	21,589 00	133 21%
41500 Food and Beverage	191,087 57	200,000 00	(8,912 43)	95 54%
41600 Pro/Merch Shop	8,417 00	5,000 00	3,417 00	168 34%
41900 Other Revenues	84,756 00	108,500 00	(23,744 00)	78 12%
Total Income	370,849.57	378,500.00	(7,650.43)	97.98%
Cost of Goods Sold				
50000 Cost of Labor Wages - SFM Labor Costs	55,615 00	50,750 00	4,865 00	109 59%
51100 Facility Rental COGS	20,665 00		20,665 00	
51500 Food & Beverage	38,408 21	74,000 00	(35,591 79)	51 90%
51600 Pro Shop	4,208 50	1,000 00	3,208 50	420 85%
51900 Other Cost of Goods Sold	6,518 00	20,000 00	(13,482 00)	32 59%
Total Cost of Goods Sold	125,414.71	145,750.00	(20,335.29)	86.05%
Gross Profit	245,434.86	232,750.00	12,684.86	105.45%
Expenses				
60000 Advertising / Marketing	2,291 17	2,500 00	(208 83)	91 65%
60400 Bank Service Charges & Other Fees	(855 83)	1,500 00	(2,355 83)	-57 06%
60500 Business Licenses and Permits	-	150 00	(150 00)	0 00%
61000 Legal & Professional Fees	-	100 00	(100 00)	0 00%
62000 General & Administrative Expenses	6,718 00	3,750 00	2,968 00	179 15%
62400 Depreciation Expense	1,315 08	1,250 00	65 08	105 21%
63300 Insurance Expense	3,541 22	4,500 00	(958 78)	78 69%
64000 Supplies and Services	5,433 60	6,000 00	(566 40)	90 56%
65000 Salaries and Wages	56,871 56	51,333 00	5,538 56	110 79%
66000 Other Payroll Expenses	13,196 51	11,293 26	1,903 25	116 85%
67200 Repairs and Maintenance	46,581 53	55,000 00	(8,418 47)	84 69%
68600 Utilities	24,876 64	17,500 00	7,376 64	142 15%
Total Expenses	159,969.48	154,876.26	5,093.22	103.29%
Net Operating Income	85,465.38	77,873.74	7,591.64	109.75%

el (727) 474-384
5
Fax (727) 462-280

Sports Facilities Management LLC
sportadvisory.com

July 2022 Reporting

APPENDIX II: PRIOR YR COMPARISON (MONTH) – PROFIT & LOSS

	Jul 2022	Jul 2021 (PY)	Change	% Change
Income				
41100 Field Revenue	86,589.00	65,000.00	8,589.00	133.21%
41500 Food and Beverage	191,087.57	200,000.00	(68,912.43)	95.54%
41600 Pro/Merch Shop	8,417.00	5,000.00	(5,000.00)	168.34%
41900 Other Revenues	84,756.00	108,500.00	(78,910.73)	78.12%
Total Income	370,849.57	378,500.00	(144,234.16)	97.98%
Cost of Goods Sold				
50000 Cost of Labor Wages - SFM Labor	55,615.00	50,750.00	(15,133.55)	109.59%
51100 Facility Rental COGS	20,665.00	-	5,665.70	0.00%
51500 Food & Beverage	38,408.21	74,000.00	(35,591.79)	51.90%
51600 Pro Shop	4,208.50	1,000.00	(1,000.00)	420.85%
51900 Other Cost of Goods Sold	6,518.00	20,000.00	(19,750.00)	32.59%
Total Cost of Goods Sold	125,414.71	145,750.00	(65,809.64)	86.05%
Gross Profit	245,434.86	232,750.00	(78,424.52)	105.45%
Expenses				
60000 Advertising / Marketing	2,291.17	2,500.00	(208.83)	91.65%
60400 Bank Service Charges & Other Fees	(855.83)	1,500.00	(2,355.83)	-57.06%
62000 General & Administrative Expenses	6,718.00	3,750.00	2,968.00	179.15%
62400 Depreciation Expense	1,315.08	1,250.00	65.08	105.21%
63300 Insurance Expense	3,541.22	4,500.00	(958.78)	78.69%
64000 Supplies and Services	5,433.60	6,000.00	(566.40)	90.56%
65000 Salaries and Wages	56,871.56	51,333.00	5,538.56	110.79%
66000 Other Payroll Expenses	13,196.51	11,293.26	1,903.25	116.85%
67200 Repairs and Maintenance	46,581.53	55,000.00	(8,418.47)	84.69%
68600 Utilities	24,876.64	17,500.00	7,376.64	142.15%
Total Expenses	159,969.48	154,876.26	5,093.22	103.29%
Net Operating Income	85,465.38	77,873.74	7,591.64	109.75%

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APPENDIX III: YTD FINANCIALS – BUDGET VS ACTUAL (JULY '22–JUNE '23)

Income	Actual	Budget	over Budget	% of Budget
40800 Recreational Programs - Youth & Adult	-	-	-	
41100 Field Revenue	86,589.00	65,000.00	21,589.00	133.21%
41500 Food and Beverage	191,087.57	200,000.00	(8,912.43)	95.54%
41600 Pro/Merch Shop	8,417.00	5,000.00	3,417.00	168.34%
41900 Other Revenues	84,756.00	108,500.00	(23,744.00)	78.12%
Total Income	370,849.57	\$ 378,500.00	(7,650.43)	97.98%
Cost of Goods Sold				
50000 Cost of Labor Wages - SFM Labor	55,615.00	50,750.00	4,865.00	109.59%
51100 Facility Rental COGS	20,665.00		20,665.00	
51500 Food & Beverage	38,408.21	74,000.00	(35,591.79)	51.90%
51600 Pro Shop	4,208.50	1,000.00	3,208.50	420.85%
51900 Other Cost of Goods Sold	6,518.00	20,000.00	(13,482.00)	32.59%
Total Cost of Goods Sold	125,414.71	\$ 145,750.00	(20,335.29)	86.05%
Gross Profit	245,434.86	\$ 232,750.00	12,684.86	105.45%
Expenses				
60000 Advertising / Marketing	2,291.17	2,500.00	(208.83)	91.65%
60400 Bank Service Charges & Other Fees	(855.83)	1,500.00	(2,355.83)	-57.06%
60500 Business Licenses and Permits	-	150.00	(150.00)	0.00%
61000 Legal & Professional Fees	-	100.00	(100.00)	0.00%
62000 General & Administrative Expenses	6,718.00	3,750.00	2,968.00	179.15%
62400 Depreciation Expense	1,315.08	1,250.00	65.08	105.21%
63300 Insurance Expense	3,541.22	4,500.00	(958.78)	78.69%
64000 Supplies and Services	5,433.60	6,000.00	(566.40)	90.56%
65000 Salaries and Wages	56,871.56	51,333.00	5,538.56	110.79%
66000 Other Payroll Expenses	13,196.51	11,293.26	1,903.25	116.85%
67200 Repairs and Maintenance	46,581.53	55,000.00	(8,418.47)	84.69%
68600 Utilities	24,876.64	17,500.00	7,376.64	142.15%
Total Expenses	159,969.48	154,876.26	5,093.22	103.29%
Net Operating Income	85,465.38	77,873.74	7,591.64	109.75%

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APPENDIX IV: PY COMPARISON (YTD) – PROFIT & LOSS (JULY '22–JUNE '23)

	2022	2021 (PY)	Change	% Change	
Income					
41100 Field Revenue	86,589.00	59,363.61	27,225.39	45.86%	45.86%
41500 Food and Beverage	191,087.57	168,255.87	22,831.70	13.57%	
41600 Pro/Merch Shop	8,417.00	7,837.95	579.05	7.39%	
41900 Other Revenues	84,756.00	3,794.32	80,961.68	2133.76%	
Total Income	370,849.57	\$ 239,251.75	131,597.82	55.00%	
Cost of Goods Sold					
50000 Cost of Labor Wages - SFM Labor Costs	55,615.00	41,394.30	14,220.70	34.35%	
51100 Facility Rental COGS	20,665.00	4,042.83	16,622.17	411.15%	
51500 Food & Beverage	38,408.21	57,387.94	(18,979.73)	-33.07%	
51600 Pro Shop	4,208.50	1,399.65	2,808.85	200.68%	
51900 Other Cost of Goods Sold	6,518.00	1,324.98	5,193.02	391.93%	
Total Cost of Goods Sold	125,414.71	\$ 105,549.70	19,865.01	18.82%	
Gross Profit	245,434.86	\$ 133,702.05	111,732.81	83.57%	
Expenses					
60000 Advertising / Marketing	2,291.17	1,456.41	834.76	57.32%	
60400 Bank Service Charges & Other Fees	(855.83)	2,254.89	(3,110.72)	-137.95%	
62000 General & Administrative Expenses	6,718.00	1,463.06	5,254.94	359.17%	
62400 Depreciation Expense	1,315.08	1,139.04	176.04	15.46%	
63300 Insurance Expense	3,541.22	3,409.47	131.75	3.86%	
64000 Supplies and Services	5,433.60	1,963.21	3,470.39	176.77%	
65000 Salaries and Wages	56,871.56	40,313.85	16,557.71	41.07%	
66000 Other Payroll Expenses	13,196.51	7,270.17	5,926.34	81.52%	
67200 Repairs and Maintenance	46,581.53	49,051.04	(2,469.51)	-5.03%	
68600 Utilities	24,876.64	16,850.08	8,026.56	47.64%	
Total Expenses	159,969.48	125,171.22	34,798.26	27.80%	
Net Operating Income	85,465.38	8,530.83	76,934.55	901.84%	

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APPENDIX VI: ASSET MANAGEMENT

Maintenance & Physical Property – All equipment is operating and in fair condition.

EQUIPMENT

3/4 Ton Pickup w/ Snowplow	John Deere Gator
Field 5 Reel Mowers	John Deere CX Gator
Field 5 Rotary Deck Mower	John Deere Mid Duty Utility Vehicle
Utility / Field 3 - Deck Rotary Mower	John Deere Mid Duty Utility Vehicle
4Wd ZTR - General Grounds Mower	Multi Terrain Track Loader
General Grounds Mower	New Holland Tractor
HD Turf Utility Vehicles	New Holland
Infield Groomers	Synthetic Turf Groomer
Pull Behind Blower	Synthetic Turf Sweeper W/Magnet
Turf Sweeper Vacuum	Top dresser
Turf Chemical Tank Sprayer	Pull Behind Aerator
Deep Tine Aerator	Pull Behind Roller
Pull Behind Granular Spreader	Verticutter
Seeder	

- ✓ Developing a long-term capital improvement strategy to ensure proper upkeep of our park.
- ✓ Evaluating all current equipment and developing long-term replacement strategies.
- ✓ Maintenance & Physical Property – All equipment is in fair shape. All equipment is currently up and running properly. In-depth inspection of all equipment and maintenance continues to take place monthly.
- ✓ Due to current market conditions we continue to stock up on normal wear and tear parts/tires.

APPENDIX VII: FORECAST TRACKING

Local user group rentals are ramping up, bringing in additional revenue without much expense to host. Expect USSSA fall tournaments to be strong and bring between 50-80 teams each weekend.

CONCLUSION

Revenue was slightly behind pace as a direct result of expected sponsorships closings being pushed into August. These items are still on pace and we expect to make up the revenue in July. All other revenue has exceeded budget which is a good sign as we have not yet launched internally operated programming which traditionally has a higher Gross Profit.

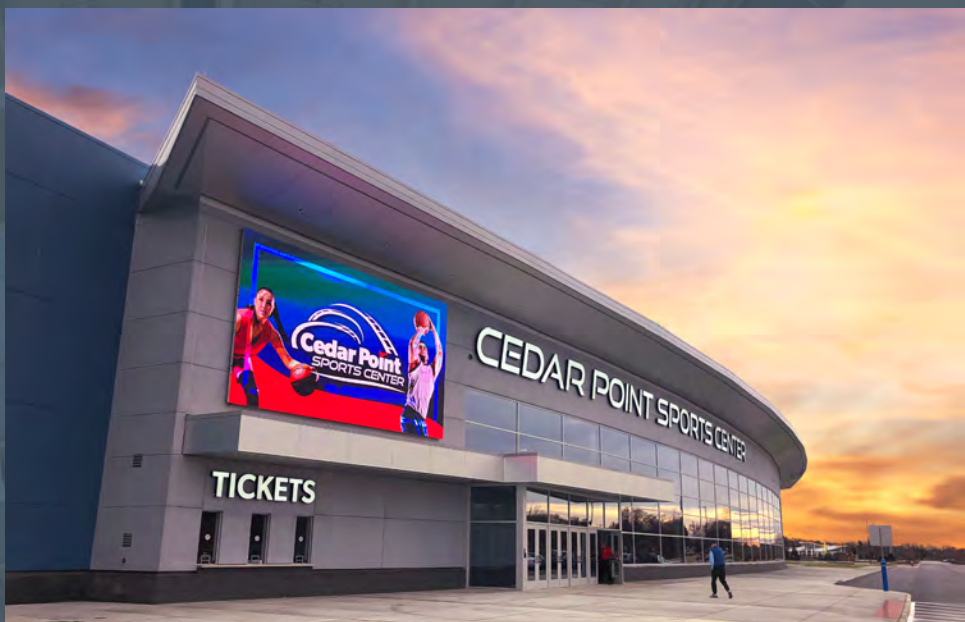
Cost of Goods Sold was low with regards to % of revenue. This is due to the use of product provided as part of food and beverage sponsorship deals. We have currently sold approximately 73% of the product provided in these sponsorship deals. We expect food and beverage COGS to increase in August and normalize in September.

Expense management is on pace and maintenance of facility assets continues to be a top priority for our team as we look to push out the capital improvement dates.

ECONOMIC IMPACT PROJECTIONS

The information below highlights the economic impact performance of venues that have similar programs as the proposed adjustments to the program at the Cabarrus Arena & Events Center. The first section provides detailed economic impact data from five (5) sports tourism focused facilities with eight (8) hard courts.

The second section provides the median economic impact performance of all indoor facilities within The SFNetwork. In order to understand the impact of each court, SFC has pulled court related event data only from all of the facilities within our network. Applied to Cabarrus, our key performance indicator data would suggest that the facility has the ability to drive \$18.2M in direct spending through court programming alone, with the ability to generate upwards of \$40M with added/ancillary programs.



SIMILAR COURT VENUE IMPACT PERFORMANCE:



CEDAR POINT
SPORTS CENTER



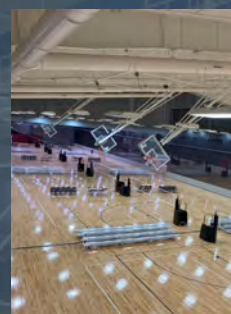
HOOVER MET
SPORTS COMPLEX



ROCKY TOP
SPORTS WORLD



MYRTLE BEACH
SPORTS CENTER



ROCKY MOUNT
EVENT CENTER

ECONOMIC IMPACT	\$17M	\$68M	\$56M	\$25M	\$14.5M
HOTEL NIGHTS	15,000	86,324	81,661	49,000	25,544
TOTAL VISITORS	59,680	219,806	155,030	195,000	131,202
DIRECT JOBS/YR	73	175	40	80	245

SFNETWORK FACILITY MEDIAN IMPACT STATISTICS*

\$17M	30K	120K	94
DIRECT SPENDING	ROOM NIGHTS	ANNUAL VISITS	DIRECT JOBS

*Median impact statistics pulled from all indoor, court based venues within The SFNetwork

CABARRUS ARENA & EVENT IMPACT OPPORTUNITY*

\$18M	42K	194K	125
DIRECT SPENDING	ROOM NIGHTS	ANNUAL VISITS	DIRECT JOBS

*Impact based on event assumptions and metrics based from all indoor, court based venues within The SFNetwork

SFNETWORK ECONOMIC IMPACT PER COURT: \$2.6M

*The industry average of economic impact per court is slightly below \$1M

A full-page photograph of a gymnast in a red and black leotard performing on a blue balance beam in a large gymnasium. The gymnast is in a split leap position with one arm raised high. In the background, spectators are seated in blue bleachers. A semi-transparent dark blue rectangle is centered over the image, containing the text "FINANCIAL PLAN" in white.

FINANCIAL PLAN

FINANCIAL MANAGEMENT & REPORTING

WE WORK FOR YOU

The ability to work effectively and with the level of transparency essential in a public-private partnership requires relevant experience, high-quality service processes, accurate and timely financial reporting, and constant communication. We believe that this is a foundational element of a successful partnership and a unique advantage for SFC based on our real-world experience in serving public sector clients and operating the nation's leading sports tourism complexes over the past 19 years.

TRANSPARENCY

We can not stress this enough - ***our model has full transparency.*** In addition to professional monthly, quarterly and annual reporting, the County will have full access to all financial and accounting records at any time during our partnership. Every dollar that is generated at the facility will run through a publicly controlled POS system while every dollar out is rigorously tracked and reported in our monthly ledger. You will not find a more thorough and transparent financial planning, tracking and reporting process than SFC will provide your team.

ANNUAL BUSINESS PLAN

Each year SFC will facilitate an in-depth strategy session with the County and facility staff to refine and expand the definitions of success and desired outcomes. This is especially important over the first few years as future phases are developed. This discussion can also include how other parks and recreation assets in the community can fit into the overall short-term and long-term operational strategy.

ANNUAL OPERATING BUDGET

Using the annual business plan as the foundation, SFC will work with the County to create a detailed annual operating budget. SFC's proven budgeting process based on expected revenue provides the framework for the most successful and profitable operating model possible. The budget may be adjusted over time in coordination with the County as partnerships are developed and opportunities are discovered based on current market and community conditions, while still referencing the original pro forma. The County will have full authority over the operating budget and it will not be finalized until it receives full County sign-off and support.

MONTHLY VARIANCE REPORTING

With SFC your facility will undergo a rigorous monthly "Budget Versus Actual" (variance) review. Led by your Account Executive and General Manager, SFC will perform a monthly top-to-bottom review of the operation including a line item review of "Budget vs. Actual" results. The process includes a review of the prior month performance, a forward-looking discussion of critical action items, marketing initiatives, and a pace-to-goal session. This "variance" process drives performance and accountability while providing the facility team with the expertise and resources of SFC advisors.

QUARTERLY ECONOMIC IMPACT REPORTING

One of the main success factors of the project is driving economic impact and hotel room nights. Rather than relying solely on event operators, SFC will bring our own internal proprietary economic impact tracking results. This ensures objective results that also match up with all other visitation and impact calculators currently used.

ANNUAL REPORT

SFC will deliver an annual report to the County which will look at the overall success of the facility in all areas, including local activation, economic impact and financial performance. At the conclusion of this annual report, SFC will immediately start the process over again by working directly with the County to create the following years business plan.

WORKING WITH SFC'S MANAGEMENT MODEL HAS PROVIDED US WITH CONTROL OF OUR ASSETS, FINANCIALS, AND FULL TRANSPARENCY INTO OUR OPERATIONS...THEIR TRACK RECORD IS ACHIEVING THE FINANCIAL AND QUALITATIVE OUTCOMES TO WHICH THEY COMMIT.

DUFF MILKIE

Former Executive Vice President,
General Counsel of Cedar Fair,
Cedar Point Indoor Sports Center

FINANCIAL PERFORMANCE RANGE

The facility is currently producing revenues at a high level compared to industry average across the country. Each area is performing in this category with the exception of sponsorships and naming rights, which are currently both unaccounted for. Sponsorship/Naming rights are a major opportunity, specifically as sports tourism venues have traditionally outperformed event centers of similar sizes in these areas. In addition, revenues associated with sponsorships and naming rights have a much lower COGS than other revenue areas, allowing a large portion to flow to the operational bottom-line.

The largest opportunity for financial improvement at the facility lies in the reduction of COGS and management of indirect expenses. When reviewing the current expense detail there were a number of concerns as well as areas for improved financial performance.

- Current operations spends 37% of revenues to cover the costs of goods sold. The industry average is 35% with top performing venues spending 26-30%
- Facility & Operational Expenses are currently at 41% of revenue which is significantly higher than the industry average of 28%.

- Management and payroll are currently at 41% of revenue which is right at the industry average of 42%. High-performing and top-performing venues are at 38% and 32% respectively.
- The current indirect expenses include a total of \$24,381 for marketing and advertising which is incredibly low for a venue of this size. In order to drive bigger events and draw from a larger radius, we would expect to see this number at 2-3X; which in turn would take the operations even further out of the expected range of expenses.

CONCLUSION

The chart below looks at the 2022 operational performance of the Cabarrus Arena & Events Center versus more than 700 facilities across the country who's financial data is tracked by SFC (including 40+ venues managed by SFC). The average creates a benchmark and then the more successful facilities are put into high-performing and top-performing tiers.

Under SFC management, and with a shift in focus to sports tourism, we believe there is an opportunity to quickly move the facility in to the high-performing category. **For the County this means an increase of over \$400,000 in bottom-line performance with a long-term opportunity to target sustainable operations.**

CABARRUS COUNTY ARENA & EVENT CENTER OPERATIONAL ANALYSIS & PERFORMANCE RANGE OPPORTUNITY				
	ACTUAL	INDUSTRY AVERAGE	HIGH-PERFORMING	TOP-PERFORMING
REVENUE				
Event & Service Revenue	\$ 1,403,984			
Food & Beverage	\$ 585,366			
Retail Sales	\$ 500			
Parking	\$ 231,897			
Sponsorship	\$ -	\$ 115,500.00	\$ 225,000.00	\$ 450,000.00
TOTAL REVENUE	\$ 2,221,747	\$ 750,000.00	\$ 2,250,000.00	\$ 3,000,000.00
COGS				
Event Services	\$ 503,762			
Food & Beverage	\$ 319,831			
TOTAL COGS	\$ 823,593	\$ 262,500.00	\$ 675,000.00	\$ 780,000.00
OTHER INCOME	\$ 28,484	\$ -	\$ -	\$ -
GROSS PROFIT	\$ 1,426,638	\$ 487,500	\$ 1,575,000	\$ 2,220,000
INDIRECT EXPENSES				
Payroll, Salaries, & Wages	\$ 873,918	\$ 315,000.00	\$ 855,000.00	\$ 960,000.00
Facility & Operating Expenses	\$ 910,839	\$ 210,000.00	\$ 562,500.00	\$ 630,000.00
Management Fees	\$ 142,945	\$ 240,000.00	\$ 240,000.00	\$ 240,000.00
TOTAL INDIRECT EXPENSES	\$ 1,927,702	\$ 765,000	\$ 1,657,500	\$ 1,830,000
EBITDA	\$ (501,064)	\$ (277,500)	\$ (82,500)	\$ 390,000

EXPANDING A NATIONAL DESTINATION

Expanding the reach and economic impact of the Cabarrus Arena & Events Center begins with developing a full understanding of the existing customer and defining the potential drawing radius of sports tourism. Mobile analytics provides the ability to see where visitors are coming from as well as full socioeconomic profile of the average visitor.

Using SFC mobile device data, we have been able to create a visitor profile for the Cabarrus Arena & Event Center. This sample set of mobile device data allows us to understand the visitor origin as well as demographic and consumer attributes of the device household. For the purposes of this exercise, we are using this data to track where facility visitors have been coming from to gain a better understanding of what level of true economic impact is being generated at the facility. We have then compared the data to the visitation data over the same date range to the Hoover Met Complex in Hoover, AL. We have selected the Hoover Met due to a number of similarities between the locations and venues, including

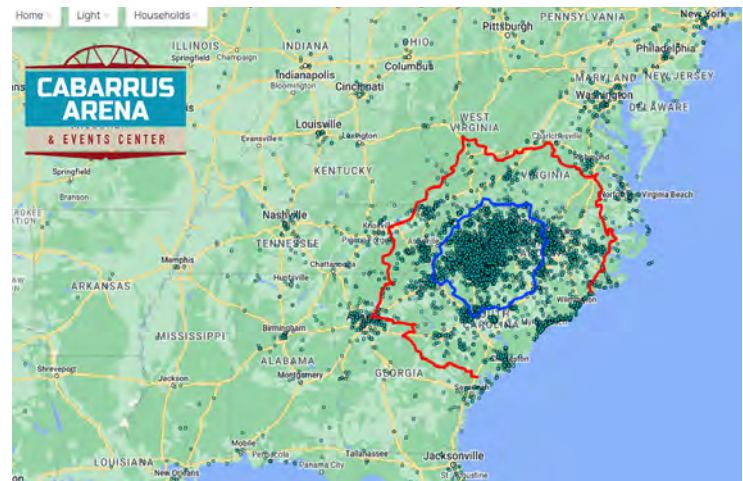
1. Total Population (Concord 107k/Hoover 92k)
2. Proximity to major market (Charlotte/Birmingham)
3. 4 hour drive time population (Concord 18M/Hoover 21M)
4. Similar program (Hoover 8 Courts / Concord 7 Proposed)
5. Similar focus on local use programming and opportunities along with economic impact generating events

As you can see from the origination maps and drive-time radii, Cabarrus Arena & Events Center is currently drawing from a local and small regional market. While the complex does host some notable events, and pulls from limited households outside the 4 hour drive time (red), an unbalanced number of visitors are coming from within a 40-mile radius of the facility.

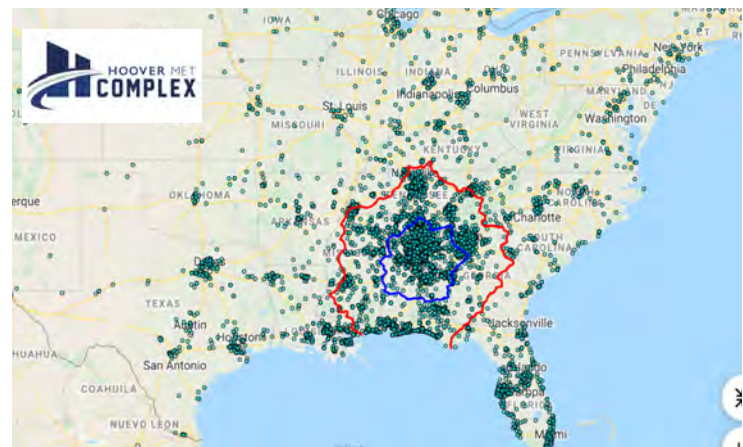
- 66% of visitors to are coming from within a 40-mile radius as compared to only 46% at the Hoover Met. The reason this is important is that it shows that a majority participants and visitors in events in Cabarrus do not provide hotel stays or create high levels of economic impact
- 61% of visitors to the Arena & Events Center came from Cabarrus County or neighboring counties as compared to Hoover who's surrounding county visitation percentages were 47%.

Based on the initial visitation and impact analysis, we believe there is a significant opportunity to increase the amount of true economic impact being driven to Cabarrus County by shifting to a sports tourism focus. While event and meeting business has continued to struggle coming out of COVID, sports tourism has continue to explode across the country. 2022 saw a majority of venues in the SFNetwork achieve their most successful years in terms of economic impact. **For the County this will expand the drawing radius of the facility, improve the number of out-of-market guests, and dramatically increase the direct spending and economic impact generated by the facility.**

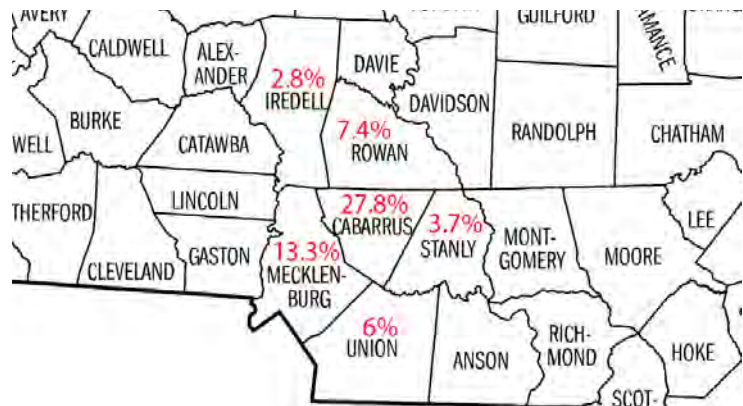
Arena & Event Center Visitor Origination Map with Drive-Time



Hoover Met Visitor Origination Map with Drive-Time



Cabarrus County - Surrounding County Visitor %



VISITOR PROFILE





Through mobile data, we are able to develop a full understanding of the socioeconomic profile of visitors to the Arena & Event Center, creating visitor segments based on lifestyle, life stage, behavioral, and consumer characteristics. Each of these segments is identified by a letter and a number. Simplified down, communities and facilities seeking high economic impact return on investment should be typically seeking lower letter and number combos. For instance, the two customer profiled below show the highest percentage visitor segment to Hoover Met (A03 Kids and Cabernet) as compared to Cabarrus (D15 Sport Utility Family). While the title of the consumer seems to fit the profile, as you can see below, the Hoover visitor profile has a much higher estimated household income while also having a higher likelihood of having children within the preferred range of sports tourism.

A03: Kids and Cabernet			
Prosperous, middle-aged married couples living child-focused lives in affluent suburbs			
Who We Are			
		HOVER	CABARRUS
Age of children:	13-18	410	52.8%
Estimated Household Income:	\$250,000+	726	39.5%
Head of household age:	36-45	296	45.6%
Home ownership:	Homeowner	117	95.5%
Household size:	2 persons	139	59.2%
Type of property:	Single family	107	99.3%





D15: Sport Utility Families			
Upscale, middle-aged couples with school-aged children living active family lifestyles in outlying suburbs			
Who We Are			
		HOVER	CABARRUS
Age of children:	7-9	370	43.7%
Estimated Household Income:	\$125,000-\$149,999	316	25.6%
Head of household age:	36-45	380	58.6%
Home ownership:	Homeowner	116	95%
Household size:	2 persons	139	59.2%
Type of property:	Single family	107	99.1%

Below is a breakdown of the top four visitor segments for Cabarrus County as well as Hoover. As you can see, the visitor segments paint a different picture between the three venues. The top tiers of the Cabarrus Arena & Events Center point to older visitors with household incomes between \$75K and \$150,000; whereas all four top categories at Hoover are categorized as families likely to have children between 13 and 18 with household income above \$250K. These categories match perfectly to the defining characteristics of households most likely to travel for youth sports. This data shows that while visitation numbers are good at the facilities, a majority of visitors are not in the upper tier of consumers most likely to have the ability and willingness to spend large amounts of disposable income. Combined with the high level of local visitors shown on the previous page, the current operations of the Arena & Events Center is not capitalizing on the opportunity to bring direct spending, economic impact, and room night generation to the region.

Cabarrus Highest Visitation Segments

 D15: Sport Utility Families Upscale, middle-aged couples with school-aged children living active family lifestyles in outlying suburbs View Details	7.87% of visitors
 B07: Across the Ages Flourishing couples and multi-generational families living a wide range of lifestyles in suburban View Details	3.79% of visitors
 C11: Sophisticated City Dwellers Wealthy boomer-aged couples living in cities and closed-in suburbs View Details	3.65% of visitors
 C13: Philanthropic Sophisticates Mature, upscale couples in suburban homes View Details	3.32% of visitors

Hoover Highest Visitation Segments

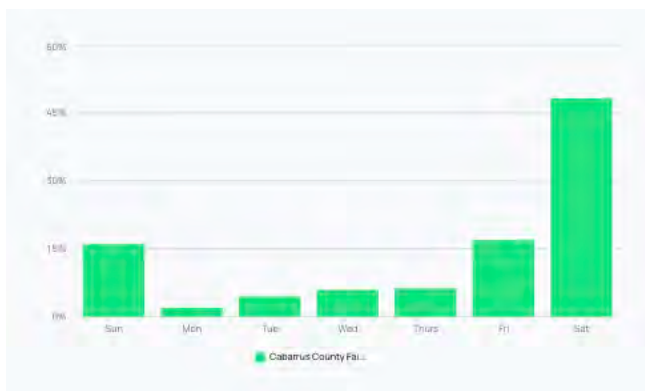
 A03: Kids and Cabernet Prosperous, middle-aged married couples living child-focused lives in affluent suburbs View Details	8.29% of visitors
 A01: American Royalty Affluent, influential and successful couples and families living in prestigious suburbs View Details	5.72% of visitors
 A05: Couples with Clout Highly-educated mobile couples living life to the fullest in affluent neighborhoods View Details	4.2% of visitors
 A04: Picture Perfect Families Established families on the go, living in wealthy suburbs View Details	4.1% of visitors

VISITATION TRENDS

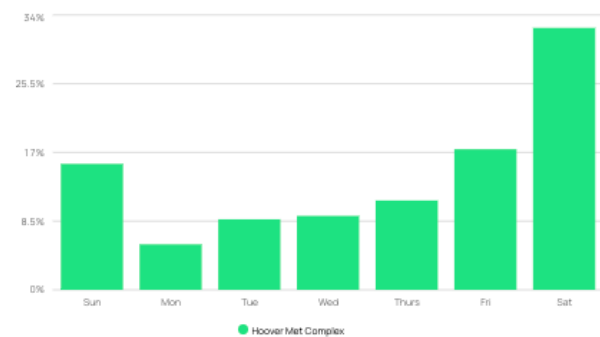
The charts below look at the percentage of visitors by day to the facility. As you can see, the current program is heavily leaning towards Saturday and Sunday programming, with 65% of guests attending events on those days. While this matches up with the understanding of how events and tourism venues work, it does highlight that the facility has not adapted to one of the biggest changes in the industry. Whereas three years ago facilities split local use and economic impact generating activities between parts of the week (Mon-Fri and Saturday/Sunday respectively), the industry has swiftly adjusted, and the most successful complexes are generating economic impact and providing local use opportunities throughout the entire week.

Between the two facilities, you can clearly see that Hoover has been able to create a more balanced schedule of events and visitors throughout the entire week. In 2022, Hoover created \$68M in economic impact and was responsible for nearly 70,000 room nights in the area. During the same fiscal year, the facility was able to hit budget goals while also donating nearly \$500,000 of time to local community groups.

Cabarrus Daily Visitation %



Hoover Daily Visitation %



CONCLUSION

The visitor profile data and behaviors and the visitor origin explored in this report show that the Cabarrus Arena & Events Center has a large amount of growth opportunity in terms of driving tourism and economic impact. In 2022, the facility welcomed 177,000 guests, which is a relatively good visitation number for a complex of its size. However, when digging into the visitation data, a number of things have become apparent:

1. The facility is struggling to drive large amounts of traffic from outside the local area
2. The events held at the facility are not attracting guests in categories with high ability and propensity to spend discretionary income
3. The facility does not maximize its weekly calendar - leaving a large number of days and times unused.
4. The facility seems to be one-dimensional with regards to hosting events for visitation versus creating a venue that provides a wide array of local-use opportunities

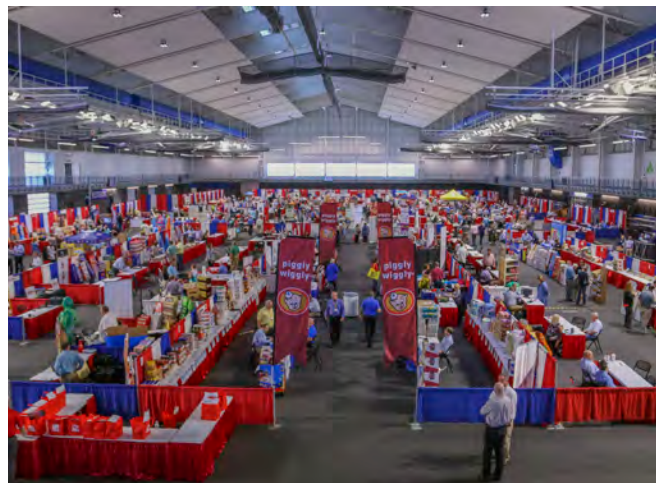
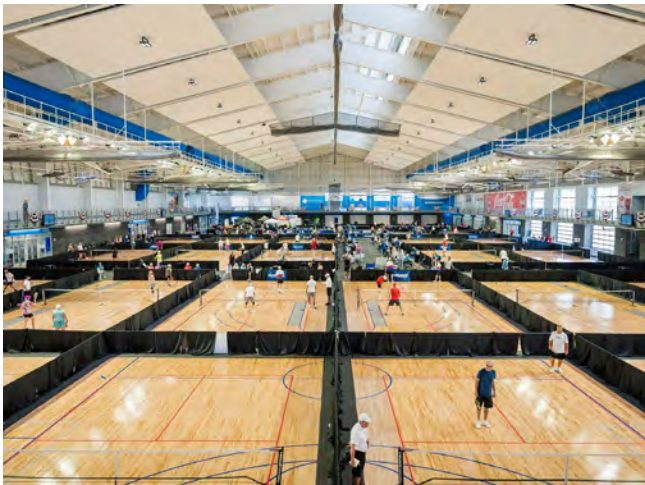
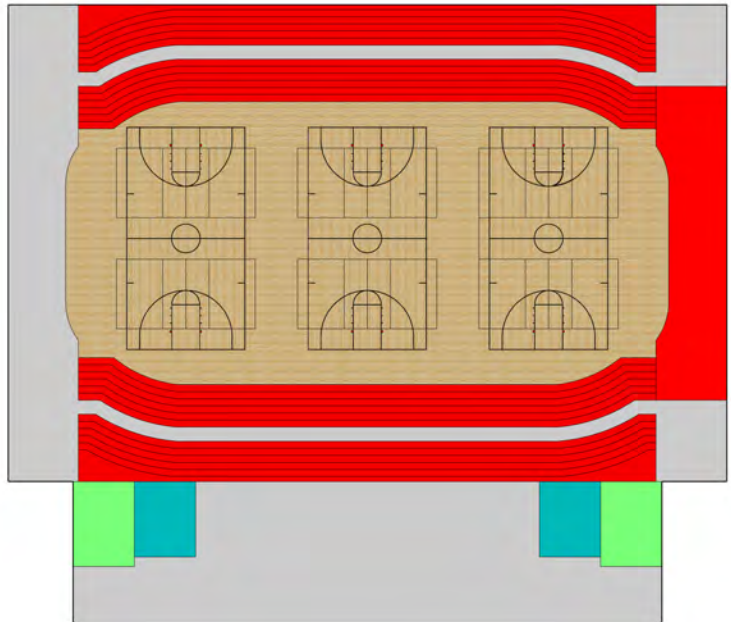
With a switch to a sports tourism focus and under SFC management, there is an opportunity to:

- ***Expand the reach of the facility resulting in higher levels of economic impact while also introducing tourists to Concord and Cabarrus County - creating the opportunity for return visitation.***
- ***Attract a higher-end consumer which will drive a higher per-person spend in market as well as a longer length of stay***
- ***Drive upwards of \$40M in economic impact***
- ***Generate over 40,000 room nights***
- ***Create more local programming opportunities for residents of Cabarrus County - enhancing the quality of life for residents while also helping improve the sustainability of operations.***

SCHEMATIC FLOOR PLANS - MAIN ARENA

ARENA PROGRAM

- Hardwood flooring
- 3 high school basketball courts
- 6 volleyball courts
- 12,000 square foot arena lobby
- Seating capacity 5,000 (2,200 fixed seats)
- 7 executive suites
- 2 dressing rooms with lockers and showers
- Full, half, and quarter house stage orientation
- 2 lobby concession stands
- Portable concessions stands

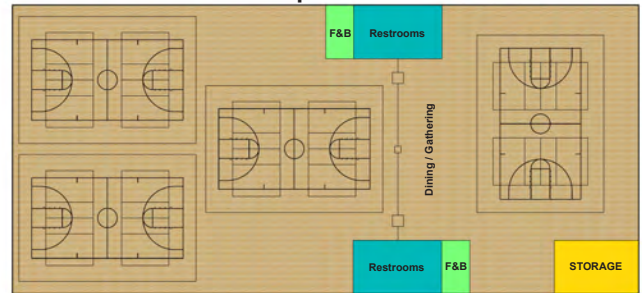


SCHEMATIC FLOOR PLANS - EVENT CENTER

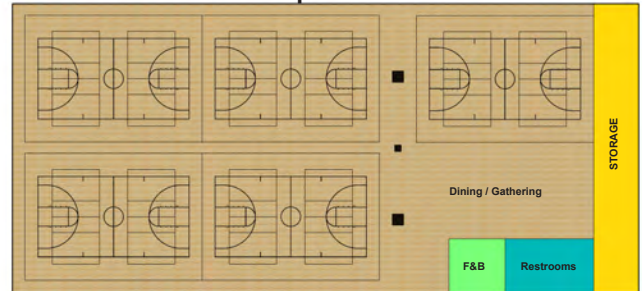
ARENA PROGRAM

- Hardwood flooring
- 70,000 square feet total
- 4 high school basketball courts (potential for 5)
- 8 volleyball courts (potential for 10)
- Two permanent concession stands
- Loading dock remains (storage locations flexible)
- Roll up doors remain - potential reduction to introduce glazing
- Three 10' x 10 1/2' roll up entrance doors
- Upgraded concessions - multiple options

Option 1



Option 2



SCHEMATIC FLOOR PLANS - GOLD HALL

ARENA PROGRAM

- 30,000 square feet total
- 20,000 square foot family entertainment center
- 10,000 square foot concessions and party room area
- 5 party/flex rooms
- Restrooms
- Direct access to parking and fairgrounds
- Storage

FAMILY ENTERTAINMENT OPTIONS

- Virtual reality (i.e. golf simulators)
- Arcade
- Party rooms
- Boutique bowling
- Redemption store



CONCEPTUAL OPINION OF COST

The budget below was developed to give an early conceptual opinion of costs for the renovations necessary to transition to the Arena & Events Center into a sports tourism destination facility. The costs do not include any infrastructure, additional utility needs, HVAC, necessary building repairs (i.e. roof), or similar (if necessary). This budget includes the installation of FF&E, sporting equipment and allowances for signage and general updating of the spaces.

	Quantity	Unit	Cost/Unit	Budgeted Cost
Field and Sport Equipment Cost				
Court Area				
Hardwood Flooring	95,000	SF	\$11	\$1,045,000
Basketball Net & Stanchion System	14	Ea.	\$15,000	\$210,000
Volleyball Net System	14	Ea.	\$4,000	\$56,000
Pickleball Net System	16	Ea.	\$150	\$2,400
Wall Padding	7	Ea.	\$4,000	\$28,000
Scoreboards	7	Ea.	\$10,000	\$70,000
Court Seats (Participants)	322	Ea.	\$125	\$40,250
Bleachers (Spectators)	28	Ea.	\$3,000	\$84,000
Curtains (Court)	6	Ea.	\$20,000	\$120,000
Vinyl Floor Covering	95,000	SF	\$1.70	\$161,500
Athletic Equipment	1	LS	\$20,000	\$20,000
FEC				
Arcade	4,300	SF	\$154	\$662,200
Redemption Store	400	SF	\$80	\$32,000
Virtual Reality/Simulators (Teather VR)	400	SF	\$200	\$80,000
Boutique Bowling	6,400	SF	\$90	\$576,000
POS Playcard	1	LS	\$50,000	\$50,000
Shipping & Tax			9.00%	\$291,362
Contingency			10.00%	\$352,871
Escalation			9.00%	\$349,342
Field and Sport Equipment Cost Total				\$4,230,925
Furniture, Fixtures and Equipment Cost				
FOOD & BEVERAGE				
Concessions Equipment	1	LS	\$225,000	\$225,000
New Bar Area	1	LS	\$200,000	\$200,000
Concessions Equipment	0	LS	\$0	\$0
Finish Out	1	LS	\$40,000	\$40,000
FURNISHINGS				
Furnishings	15,650	SF	\$2	\$31,300
Hardware - Security/Access Control	152,688	SF	\$0.75	\$114,516
Hardware - POS	1	LS	\$8,000	\$8,000
Hardware - Telecommunications	152,688	SF	\$1.00	\$152,688
Software	1	LS	\$5,000	\$5,000
MISCELLANEOUS				
Marquee Signage	1	LS	\$300,000	\$300,000
Graphics Package	152,688	SF	\$2.00	\$305,375
Audio/Video	1	LS	\$300,000	\$300,000
Maintenance Equipment	152,688	SF	\$0.50	\$76,344
Shipping & Tax			9.00%	\$158,240
Contingency			10.00%	\$191,646
Escalation			9.00%	\$189,730
Furniture, Fixtures and Equipment Cost Total				\$2,297,838
Soft Costs Construction				
Owner's Rep Services			2.5%	\$163,219
Permits/Inspections			0.50%	\$0
Additional Services			10.00%	\$16,322
Soft Cost Total				\$179,541
Total Construction Costs - Indoor Facility				\$6,708,304

COMPENSATION PROPOSAL

Dear Selection Committee,

As I said at the opening of this response, I am personally inspired and motivated by the potential to continue partnering with you. You are building a special facility and I believe that in partnership with Sports Facilities Companies, the sky is the limit. On behalf of my partners and our entire team, I am excited to offer a true partnership with the Complex for the management and operations of Cabarrus Arena & Events Center. We believe in this project, we believe in the market and we trust in our ability to turn the facility into the top regional sports tourism destination. With that said, we are proposing the following structure that ensures that we win together. If the County prefers a different or modified direction, our team stands ready to adjust as needed to ensure the County is comfortable with the approach.

SERVICES

SFC will provide all necessary services to manage the Cabarrus Arena & Events Center and provide all services described in the RFP. We stand ready to take on additional tasks and management opportunities as they arise.

FULL-TIME MANAGEMENT FEES

\$20,000/month for 5 years

SPONSORSHIP

30% SFC-Led Activation & Sourcing / 20% Cabarrus-led Sourcing with SFC-supported Activation

DEFERRED MANAGEMENT

TBD to align with the County's goals

This is what a true partnership looks like. We are aligned from the beginning and look forward to celebrating our success together. We win when Cabarrus Arena & Events Center wins. Thank you again for this opportunity and I look forward to the opportunity to discuss this structure in more detail with your team.



A stylized, handwritten signature in black ink, appearing to read 'Jim Arnold'.

JIM ARNOLD | PARTNER
C: 404.984.6682
jarnold@sportsfacilities.com



COMPENSATION PROPOSAL DETAILS

FULL TIME MANAGEMENT

SFC can provide Full-Time Management (FTM) for the facility involving the day-to-day oversight of all aspects of the venue including:

1. Sales
2. Staffing
3. Scheduling
4. Program Development and Management
5. Events Booking and Events Management
6. Event Economic Impact and Financial Tracking
7. Monthly Financial Reporting
8. Human Resources Oversight
9. Legal and Risk Management Advisory Services
10. Bookkeeping
11. National marketing utilizing SFC's national Marketing Network to drive overnight stays for the portion of the Venue that SFC will be managing

A COMPREHENSIVE SOLUTION

SFC Full-Time Management Services includes the selection, placement, and ongoing development of a full-time SFC -employed General Manager and leadership staff at your facility. As an SFC -managed facility, your facility will be led by an individual who is fully accountable to SFC and who views their role in optimizing your facility as a true career path. SFC culture attracts and develops ambitious, outcome-oriented managers. SFC managers are professionals who have previously managed operations for Disney's Wide World of Sports, Gaylord Entertainment, the House of Blues, Lifetime Fitness, the YMCA, SMG, NBC Comcast Global Spectrum, Westin Resorts, The United States Army, The United States Marine Corps, and a wide range of sport and recreation centers.

THE SFC NATIONAL NETWORK

Additionally, only SFC General Managers and leadership teams are part of the SFC network of GM's. This means that your facility will be led by a GM and leadership team that participates in the SFC weekly tele-conference and video-conference meetings with other SFC-employed GM's and the team of SFC operations advisors. This call requires each facility manager to report in on the progress they are making against established goals, and it provides opportunity for each of our GM's to seek perspective from other managers who are dealing with or have already overcome similar

challenges. All of these centers deal with the same challenges and opportunities inherent to the sports/fitness/ recreation/ entertainment facility industry. These managers are also benchmarked against one another and against the highest revenue producing and highest EBITDA-producing facilities in the country.

The result is that your facility will be managed to utilize the culture of accountability, best practices, proven strategies, and profit-focused tactics that are constantly honed within the SFC FTM network.

MONTHLY VARIANCE REPORTING (BUDGET VERSUS ACTUAL)

With SFC your facility will undergo a rigorous monthly "Budget Versus Actual" (variance) review. Led by a full-time SFC Management Advisor, your GM, leadership team, and staff will be part of a monthly top-to-bottom review of the operation including a line item review of "Budget vs. Actual" results. The process includes a review of the prior month performance, a forward-looking discussion of critical action items, marketing initiatives, and a pace-to-goal session. This "variance" process drives performance and accountability while providing your team with the expertise and resources of SFC advisors.

ACCOUNTABILITY

With Full-Time Management, your GM/leadership team reports directly to the Vice President of SFC and the CEO of SFC. The GM is fully accountable to employing SFC best practices and executing on every action item identified in your annual business plan and monthly action plan. This accountability allows for no excuses and no gap between the plan, the goal, and the on-the-ground execution.

FINAL SAY

Approval of SFC's GM is 100% up to the Client. If you desire, SFC will present the candidate we have selected and the rationale for the selection. Your team will then approve or reject the candidate. Finally, with SFC's FTM program, you will be guaranteed temporary management and replacement of any position in the event of a future unexpected GM/leadership team departure. With the FTM program you benefit from:

1. Full-time SFC General Manager and leadership team
2. Constant learning and accountability through the SFC national network
3. Replacement of the GM and placement of a temporary

and experienced GM in the event of a departure

4. A career-minded industry professional
5. A culture of accountability
6. Annual Business Plan written for your facility by SFC
7. Monthly “budget vs. actual” meeting and monthly action planning session
8. Weekly participation in FTM network
9. Transparent financial and bank reconciliation reporting
10. Unlimited access to the SFC library of Customer Service, Group Events Sales, Revenue Optimization resources
11. Monthly owners’ report and stakeholder/County meeting to include the GM and an SFC Account Executive
12. Direct reporting of your GM into SFC ownership

MANAGEMENT SERVICES

As with all of SFC’s management services, Full-Time Management involves SFC acting as a representative of your group to lead and directly influence optimized performance and accountability throughout the organization and the business. Full-Time Management Services will include:

1. Creation and annual review/updating of business plan, marketing action plan, and budgets
2. Seasonal budget and marketing action plans
3. Marketing and advertising plan and campaigns
 - Website optimization and social media campaign
 - PR campaign
 - Tradeshow and conference schedule (as applicable)
 - Direct sales and direct calls to event and tournament organizers
 - Familiarization visits
 - Integration and collaboration with local Parks & Rec department and local CVB
 - Site-specific tournament and event development
 - Direct Mail campaign
 - Article writing and print advertising
4. Detailed timeline and action items for development and facility/operation updates
5. Annual review of the business year prior and identification of new programming
6. Capital improvements suggestions and review
7. Identification of new investments
8. Monthly “Budget vs. Actual” (Variance) review
9. Routine review/recommendations for programming, marketing, reporting, organization updates
10. Action plan for local/regional alliances and agreements

with sports/recreation organizations to bolster and maintain utilization through recurring leagues and programs as well as tournaments and events

11. Weekly management calls with SFC management and SFC’s GM network for business development and operations
12. Recurring coaching and collaboration sessions with SFC management and SFC’s GM network.

As it is SFC’s experience that more corporate support is needed during the first few years of facility operations, SFC will employ a tiered structure whereby the services and support offerings provided above taper to a degree over time.

ADDITIONAL SERVICES

As a result of staffing the leadership team, the following services are also included in SFC’s Full-Time Management option in order to recruit, train, and develop the team members:

1. Recruiting: Job analysis, candidate screening, interviewing, selection, and finalizing of job offers
2. Induction, onboarding, and training of new employees
3. Computer & IT services and support
4. Payroll administration and support
5. Provide and administer health insurance program
6. Provide worker’s compensation insurance
7. Share ‘best-practices’ policies and procedures, acquired instructions and forms
8. Identify and recommend qualified vendors, programs and software, and proven hardware solutions
9. Annual updating of Business Plan
10. Employment Plan
11. Food & Beverage Plan
12. Financial Tracking and Monitoring (collection of monies, books and records, insurance, taxes and assessments, compliance with legal requirements, other fees, and costs, etc.

RISK MANAGEMENT & INSURANCE

Our risk management program is broken down into 4 important elements:



01

APPOINTMENT OF A CORPORATE RISK MANAGEMENT OFFICER:

Bruce Rector, SFC General Counsel, is responsible for the implementation, monitoring, and response/correction to all risk management related issues within our facilities. He trains and monitors facility staff on SFC's risk management procedures so they are an extension of his team, present at all facility events and programming. Bruce is kept up-to-date on any potential risk or hazards at the venues and provides feedback on the correct course of action.



02

INSURANCE POLICIES:

SFC carries comprehensive insurance policies at all of our venues that meet or exceed the standards of our Client's COI requirements. Depending on the facility and management structure, these coverages may include: accident, general liability, workers' compensation, auto, and property insurance. Due to SFC's extensive list of unique facilities and features, we are also capable of sourcing innovative insurance solutions for FECs (climbing) and aquatics.



03

WAIVERS & AGREEMENTS

If needed, SFC's risk management program includes waivers and agreements for facility participants, subcontractors, and event owners to mitigate or transfer the financial responsibility if an incident should occur. Examples of these waivers are: participant waiver and release of liability, medical consent form, image release, facility use agreements (containing SFC as an additional insured), subcontractor and vendor agreements.



04

FACILITY POLICY & PROCEDURES:

SFC facility staff is routinely trained on SFC's risk management policies and procedures and the appropriate resources to use when and if an incident does occur. This includes:

- Daily Facility Walk-Throughs
- Equipment Inspections
- Kitchen Safety
- First Aid
- Accident Reports
- Fire and Severe Weather Procedures
- Fall Prevention

SECURITY

The safety of our guests is the number one priority in all of our venues. In a time where facilities of all shapes and sizes are dealing with threats ranging from small incidents to mass casualty situations, it is imperative that all staff is trained in a wide range of scenarios. Seconds and minutes matter. SFC repeatedly trains our staff in a multitude of situations to react swiftly and correctly in any situation.

A MULTITUDE OF EVENTS

SFC is well versed in events of all shapes and sizes - each of which comes with their own unique challenges, such as:

- Large, controlled/ticketed events such as the SEC championships and concerts that draw crowds in excess of 20,000 people.
- Open facility events such as festivals that drive large crowds without secured entrances.
- Multiple concurrent events that can bring in a mix of different crowd types that must be controlled together or independently.
- Day-to-day operational events. Not all issues occur in big events. SFC is well versed in controlling and securing facilities at all times, including low volume or standard schedule facility usage.

CREATING THE PLAN

Within our standard operating procedures, SFC will work with Cabarrus County to create a process for both internal events as well as external third party events. This process will include a minimum level of security expected for events based on size as well as a formal documentation of security to be put in place. Along with Cabarrus County, SFC will work with the local emergency departments to ensure that plans will integrate seamlessly into first responder plans.

TRAINING

Standard operating procedures provide structure, however regular training provides proper response when security situations become real. SFC continually trains our staff in a multitude of different scenarios, including but not limited to: active shooter, missing child, physical altercation situations, natural disasters.

COMMUNICATION

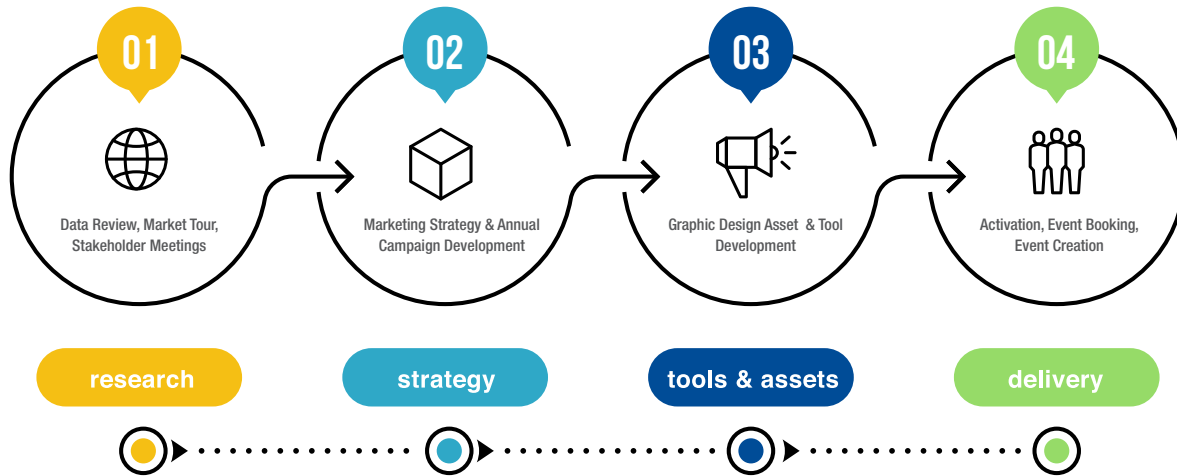
From maintaining security to controlling active situations, communication is absolutely essential in all security situations. SFC will set up and continually assess/evaluate all communication protocols internally, with Cabarrus County, and with outside agencies.





BOOKING SERVICES

MARKETING: HOW WE'LL GET TO WORK FOR YOU



PHASE 1: RESEARCH & ANALYSIS

Our approach to brand development and marketing strategy is deeply rooted in research and analysis. Our in-house marketing team uses a proven method of stakeholder engagement, market tour & research, and existing data review to create a data-rich foundation for the creative and strategic steps to follow.

Step 1 - Kick-Off Call

Prior to an on-site market visit, meeting, and tour, the Project Team will begin with an introductory call with the project stakeholders. This meeting will include team introductions, data review needs for Step 2 (below), project goals, and to schedule the in-market visit, approximately 2 weeks from project kick-off.

Step 2 - Existing Data Review

The Project Team will perform a thorough analysis of existing available data, as supplied by the County, in order to become familiar with current marketing performance including:

- Event Attendance Metrics & Annual Event Calendar
- Program Registration – Actual Versus Goal
- Marketing Budget & Associated Goals
- Existing Vendor Information & Pricing
- Past/Current Annual Marketing Budget, Marketing Plans & Strategies
- Past/Current Results by campaign, revenue stream, or channel
- Google Analytics & SEO Analytics
- Social Media Benchmarks & Email Database

Step 3 - Stakeholder Meetings & Market Tour

SFC will host a strategic planning session to be facilitated on-site to help provide insights into the project history, scope, needs, purpose, goals, and constraints. This step also assists in learning potential contributors to success for the market, potential challenges, and factors that could lead to a greater likelihood of success. This initial session also ensures that SFC and the County are aligned regarding goals, visions, communication and timelines. The strategic meetings will encompass discussions related to brand vision, existing financial projections, project goals, and current marketing plans, as well as topics such program plans, alliances with sports and other user groups, utilization, competition analysis and market share, the marketing staffing/execution plan, and much more.

Step 4: Market Demographics & Local Competition Research

SFC will conduct preliminary market research, which will encompass demographic and socio-economic data, sport participation data for the region, and an analysis of existing service providers (regional competition). This initial work will culminate with a market and demographics study to encompass drive time analysis, population and density, income and spending, growth trends, etc. This step will also include an inventory and programmatic review of the current offerings in the city. This review will leverage SFC's experience in over 2,000 communities across the country, including analysis for many other comparable cities.



strategy

PHASE II: STRATEGY

Using the existing data, reports, and analytics provided by the County and reports/results from SFC's 40+ currently managed sports destinations, our Team will build the following comprehensive marketing strategy.

Master Marketing Strategy Document will include:

- Brand Strategy & Calendar
- Year 1 Marketing Objectives Listed By Month
- Target Market Personas
- Executive Summary
- Annual Campaign Calendar
- Social Media Strategy, Calendar, Best Practices
- Email Calendar
- SEO Strategy
- Reporting Standards & Recommendations
- Annual Plan Overview For Years 2-3

theory

SFC marketing plans begin with an explanation of the theory of the approach. This is the 'why' that drives the details of the plan.

goals

The goal of the plans needed to be clearly defined and stated in a way that drives action at every level.

market

We define the target market by looking at your goals, revenue streams, and market demographics. Then we create personas for the top 3-5 targets to bring a sense of authenticity.

budget

The budget is broken down by major marketing channel such as: website, SEO, social media, print, radio, digital assets, billboards, and more.

calendar

The marketing plan defines standard monthly, semi-annual, and annual activities. Development goals for large projects are layered on top (video production, web development).

campaign

Each season, event, or program is assigned a campaign - a series of activities designed to produce a desired outcome.



tools & assets

PHASE IV: TOOLS & ASSETS

SFC will create the tools and assets designed to support the County's effort in creating a sports tourism destination Marketing Strategy and Campaign Roll Out. These will be unique and original designs created for the Cabarrus Arena & Events Center using messaging and campaign guidelines to demonstrate execution and the standard of excellence in design. Additionally, associated typefaces, design elements, and stock photography will be supplied to the County. To support the creation of these deliverables, the County may provide their own photographic or design assets for incorporation.

Design Assets Example:

- Social Media Assets
- Downloadable Content - Guides, Whitepapers
- Print Materials
- Postcards/Flyers
- Tradeshow Banners/Materials
- Facility/Destination Guides
- Event Logos/Design Elements

Marketing Tools:

- Event and Program Marketing Campaign Tracker
- Social Media Calendar
- Budget Planner
- Marketing Report
- Accountability Chart
- Press Release Template
- Project Management Tools
- Annual Plan/Strategy Document

delivery

PHASE V: EXECUTION, DELIVERY & REPORTING

With planning complete, assets developed, and strategy defined we will get to WORK. We will work tirelessly to ensure the plan is executed with excellence and we produce the results you are counting on. SFC will plan market visits and virtual presentations for major delivery points during the process. We will meet bi-weekly or monthly during the project and send out notes on progress, timeline, milestones, and action items after each. We will provide a monthly report of activity and results with a year-end comprehensive summary report.

KEY PERFORMANCE INDICATORS WE WILL USE TO MEASURE SUCCESS:

Awareness:

- Impressions
- Ad Recall
- Watch Time

Digital Engagement:

- Likes, Comments, Shares
- Downloads
- Database Growth
- CTR
- CPC

Event Booking:

- RFP Win/Bid Rate
- Outbound Calls/Meetings
- Verbal Commitments
- Contracts

Conversion:

- Sales
- Registrations
- Economic Impact - Direct

KEYS TO CABARRUS ARENA & EVENTS CENTER MARKETING APPROACH

Marketing is an ever-evolving mix of art and science. We will leverage our tried-and-true marketing and event booking practices from the 40+ communities/facilities we operate. Our in-house agency leverages webinars, whitepapers, conferences, and sports marketing groups to stay on trend.

RELATIONSHIPS

RELATIONSHIPS, RELATIONSHIPS, RELATIONSHIPS

Collaboration is in our DNA and that makes us great at developing relationships that create the win-win scenario. We are excited to collaborate with existing event providers, local clubs and leagues, City/county officials, and facility operators to develop new business, create new events, inspire new thinking, and drive results.

DIGITAL

DIGITAL IS THE NEW FRONT DOOR.

We believe in a strong, strategic digital marketing strategy. This puts your destination at the fingertips of thousands of sports families, athletes, and spectators. Developing strong digital assets, marketing funnels, social media presence, and conversion points is key to the strategy.

- Website/Online Presence - SEO, SEM, Review Sites, Travel Sites, Booking Sites (PlayEasy, HUG Scout Platform)
- Digital Assets - Videos, Photos, Downloadable Content (Travel Guides, etc)
- Marketing Funnels - Define and create the marketing funnel from discovery to conversion
- Social Media Presence - Developing authentic sports related content with personality to engage audiences.
- Conversion Points - Online Booking, Inquiry, Database Building Strategies

PRESS

LEVERAGING THE POWER OF PR.

Nothing tells a story quite like, well... a story. Our firm is well versed in creating earned media through industry relationships with major sports publications like Sports Destinations Management, SportsEvents, and Sports Travel as well as paid editorial coverage. We will bring our successful track record of elevating stories and creating a thoughtful, consistent press campaign to the Cabarrus Arena & Events Center.

We earned interviews for SFC for youth sports with these major news outlets:



PLACEMAKING

CREATING CONNECTION TO THE DESTINATION

Placemaking is a mix of art and science. It's about creating memorable experiences. We look at accessibility, sociability, uses/activities, and comfort/image when helping to define a sense of place. Our goal is to create an emotional connection to the destination that drives the desire to extend the stay, attend another event, or book a tournament.

PARTNERSHIPS

CORPORATE PARTNERSHIPS WITH POWER

Collaboration, not competition is our motto for local and regional partnerships. We don't want to cannibalize existing local events, but rather build with them or create a complement where possible. For corporate partnerships, we first approach local business ready to invest in the community and the success of tourism. We will incorporate the Cabarrus Arena & Events Center into our already powerful outreach and network of brands looking to event in the sports space.

BUILDING AND MAINTAINING AN AUDIENCE.

WEBSITE:

SFC will lead the development, design, and maintenance of a website for the Cabarrus Arena & Events Center with our preferred vendor or a vendor of the client's choice. This website will be built on Wordpress, the platform on which nearly half the internet is built (42.6%) using an editor that is easy to use, train, and edit. This will allow easy integration for our CRM, linking to any additional client sites such as Cabarrus County site or others. We recommend a 'Plan Your Visit' section of the website to ensure we are able to market the entire destination as well as any local business partners.

The site we build will have integration capability with ticketing software, CRM, and will have an up-to-date event calendar function. For any local programming options, registration links and program information will be listed online and kept current as well as link to the registration software in coordination with our operating team.

DATABASE:

We believe the CRM/user database is the lifeblood of marketing in a facility. A neat and tidy, segmented database/CRM helps maximize marketing spend, sales effectivity, and coordination of digital systems. Our teams are familiar with low-cost and high-service solutions. Where possible, we recommend the enterprise solution of HubSpot for its integrated marketing solution and reporting capabilities. We will provide log-in and permissions to HSEA staff for whatever CRM is determined to be the mutual best-fit.

SPORTS TOURISM MARKETING & EVENT PROMOTION / PRODUCTION

MARKETING APPROACH

To expand on Cabarrus Arena & Events Center's sports tourism brand and market position, we will split our approach in the B2B and B2C spaces.

To attract new events to Cabarrus County we will leverage a Regional/National Business to Business (B2B) Approach:

- Industry Conferences (TEAMS, SportsETA)
- Event Sales & Business Development
- Familiarization Visits/Market Tours
- Targeted Destination Marketing Campaign
- SFNetwork Booking Platform Inclusion
- Press Releases, Editorials
- Bid/RFP Responses
- PlayEasy/Huddle Up Group's SCOUT Booking platform

To expand on existing opportunities and inventory, SFC will leverage a Local/Semi-Regional B2B Approach:

- Work with existing local event organizers to expand or increase their reach/draw to Cabarrus County. Locally incubated events are a head-start to drawing more overnight hotel stays.

To attract families and athletes from the local community as well as throughout the region to the programs and opportunities at the Cabarrus County facilities, we will utilize a Business to Consumer (B2C) Approach:

- Social Media - Organic and Paid
- Video Campaigns
- Destination Branding for Sports
- Press Releases, Editorials
- Google AdWords
- Traditional Media

To attract additional partners or sponsors, we will leverage a B2B Approach and expand upon our existing brand relationships in the youth and amateur sports industry:

- Business Development
- Custom Destination Marketing Materials
- Custom Pitch Decks
- Stats and Visitor Information, Projections, & Data Sets

“THE TOURNAMENT WAS TWO YEARS IN THE MAKING AND FROM THE START, WE WERE IMPRESSED BY THE PROFESSIONALISM, CAN-DO SPIRIT, AND CONSTANT COMMUNICATION FROM SFC. **TO SAY WE COULDN'T HAVE DONE IT WITHOUT THEM AS A PART OF OUR TEAM WOULD BE AN UNDERSTATEMENT.**”

KAREN PARISH
MANAGING DIRECTOR OF COMPETITION
USA PICKLEBALL

EVENT PROMOTION & PRODUCTION

The SFC strategy for building a successful event calendar involves understanding the state and regional competitive landscape, identifying key stakeholders, and intentionally planning specific sports for specific weekends. These calendar planning decisions will be influenced by understanding which existing events within the region can be relocated to Cabarrus Arena & Events Center, or where we need to build or partner to create new events to fill gaps within the market.

This process also includes building relationships with local and regional influencers in each sport to make the most informed decisions to maximize results. SFC will leverage its relationships with trusted national event organizations operating within the SF Network and create the best partnership structure based on our experience with each group. These partnership structures are diverse, but are proven to create the best outcome for the venue, destination, and event partner.

1000'S OF EVENTS - ONE NETWORK

BELOW IS JUST A SMALL SAMPLING OF THE EVENTS RUN THROUGH THE SF NETWORK. A VAST MAJORITY OF THESE EVENTS WE WERE ABLE TO SECURE BEFORE THE EVENTS WENT TO A BID SYSTEM BASED ON OUR RELATIONSHIPS AND QUALITY OF VENUE.

2020 Lincoln Trail Walk to End Alzheimer's	BIG SHOTS ROCKY TOP TIPOFF	First Carolina Bank Holiday Party
2020 USSSA Kentucky State Tournament	Big Time Hoops	First Responders Dinner
2D Baseball: Youth World Series	Bishop England HS Cheer Practice	Flag Football World Championship Tour
30A Lacrosse Play Date	Blaze Pro BB	Florida Elite Gulf Coast Softball Showcase
3V3 Live Soccer Regional Championship	Blaze Volleyball Tournament	SPIKE FEST DYNAMIC EVENTZ
5 Tool Baseball-Playcations World Series	BORDER BOWL	Fox River Freeze
AAHA Squirt	Breakthrough Basketball	Futsal - Brent Ridenour
AAU Swarm Basketball Camp	BREAKTHROUGH BASKETBALL CAMP	FYSA: Presidents Cup (Soccer)
Achieve Medical Retreat	Cabin Fever Pickleball Tournament	Gameday USA Super Regional
Aggie Invitational	Cap Classic Kentucky	GATLINBURG ALL AMERICAN BOWL
AHS Section 4 Tennis Tournament	CCRESA Equity Council	Golden Leaf Foundation
AHS Swim Meet	CCU Basketball	USFA Softball: Battle on the Border
AHS Tri Swim Meet	CENTRAL HS VOLLEYBALL	GrandSlam Baseball Tournament World Series
AL Fighting Championship	Central KY Run for the Gold	Greater Joy Bapt. Church Ministries
Alabama Soccer Association: Across Borders Spring Festival	National Home School Football Champs.	Greater Midwest Baseball
Albertville Chamber Banquet	Coast to Coast Sports	Hanson Aggregate Health And Wellness
ARPA State Basketball	Coastal Carolina Pickleball	Youth Football Playoffs
ARPA Swimming	Coastal Classic Gymnastics Meet	Harlem Brewery- Blacktoberfest
Athletx Softball Fall World Championships	College National Cornhole Tournament	Heat Volleyball Scrimmage
Atlantic Coast AAU Volleyball	Vintage Market Days	Hi-Rise Basketball
Atlantic Coast Baseball Classic Series	Commonwealth Cup (KYSA)	Javanon Cup 2021
Aletico Flames Halloween Tournament	Corks & Chefs (Taste of Marshall Co.)	Jehovah Witness Basketball
ATTACK AT THE ROCK	COURTSIDE	John Hardin Football Training
AutismSPECT 5k Run/walk	Crown Town Volleyball Tournament	NC USA Wrestling
Aviators Wrestling	Defense Soap Duals	Jr All Star Basketball
AWYBA Tournament	Doug Taylor Basketball 3 v 3	Juneteenth Scholarship Gala
Axe Championship Series	Drumline Competition	Justice for Alzheimer's 5K by Harden
AYF Midwest Regional	East Coast Volleyball Academy	KCAA State Finals
Badger Region Volleyball Power League	Eastern Ministerial Alliance	Kentucky American Cup (KYSA)
Baseball Youth - All-American Games	EAYF Adult Flag Football Fundraiser	Kentucky Trails Classic, powered by ESP
Battle at the Beach Cheerleading	EAYF Ironman Allstar Tryouts	KOHL'S KICKING NATIONAL ELITE CAMP
Scare Etown 3v3 Soccer Tournament	EAYS Heartland Fastpitch League Games	KY State 7v7 Championship
BATTLE IN ROCKY TOP CHEER	Perfect Game Deep South Fall Series	KYSA Adult State Cup
SMOKY MOUNTAIN SHOOTOUT	Erie County Craft & Vendor	Lady Panther Lacrosse Girls Tournament
Battle of the Thrown: Kickball Championships	ESPN Myrtle Beach Invitational Practice	LAX Bash Lacrosse Tournament
Championships	Etown Panther Pinkman Lincoln High School Fastpitch Classic	Maumee Bay Spiketacular
Beach Ball Classic	Fall Javanon Cup	WSL Slow Pitch COED Champ
Beach Bash Volleyball	FCA FALL CLASSIC	USSSA SOCCER
Big East Volleyball Tournament	FCA PREMIER CUP Boys & Girls	US National Indoor Pickleball
Young Ladies Empowerment Series	Feast Of Tabernacles Conference	
BIG SHOTS MOUNTAIN MAYHEM	Firelands Symphony Orchestra	

CREATING, MARKETING & PROMOTING IN- HOUSE EVENTS

ORGANIC EVENT IMPLEMENTATION

While the focus will be filling the venue throughout the year with the best local programming and largest events from around the country, we also know that there will be opportunities to build and create events at the facility. These organically grown events offer the opportunity to fill traditional off-peak times or to complement an existing large event by utilizing all areas of the facility (i.e. hosting a large BBQ festival in the common areas of the facility at the same time as a traditional sports event is filling the fields).

We have deep “organic” programs and event experience. The “home grown” programming is an important and critical contribution to a well-balanced schedule, maximizing financial opportunity, and managing the guest experience. The proper balance of organic versus rental events is different for each facility’s goals, market and location. We will work with the County to strike the proper balance.

The following list is not comprehensive but provides examples of the type of organically grown and operated events that SFC has created to support our facilities around the country.



ORGANIC SPORTS EVENTS

- “Rumble at the Rock” – Premier Basketball Event
- “Smoky Mountain Showdown” - Series of clinics and tournaments
- “I-85 Elite Basketball Circuit” – restricted to 60 most elite teams for college recruiting
- “Carolina’s Basketball Cup” – 490+ team event
- “Fulmer Hall of Fame Football Camp” - one example of various sport camps during summer in multiple venues.
- “Attack at the Rock” – High School Volleyball event
- “Queen of the Mountain Volleyball Tournament” – Partner with Volleyball Clubs
- “CDC Special Event” – Disabled children’s event
- Hype Basketball Tournament Series
- Lil’ Sluggers (and various child development programs)
- Youth & Adult Volleyball, Basketball, Futsal Leagues - various venues across the country
- Basketball, Volleyball Academies & Clubs (CVBA, LVA, LBA, Stars, etc.)
- Various All-Sport summer camps
- Organic/in-house 5Ks, runs and adventure events
- Legends Night of Boxing (local boxing competition)

ORGANIC NON-SPORTS EVENTS

Various banquets/social events across all venues:

- Kulture ball – hosted by Ronnie Chang to benefit Sensory Awareness.
- High School Proms & Graduation Nights
- Father’s Day Sunday Jazz Brunch – NC.
- Craft Music Festival – AL. SFC sold sponsorships to promote and operate a music & craft beer fest
- Caribbean Culture Festival – NY
- Summer Music Series (various artists on Friday’s) –NY

Social, Birthday & Holiday Events

- Brunch with Santa and/or Easter Bunny – various venues
- Corporate holiday parties: Cisco Systems, Google, etc. Holiday Parties
- Weddings, Bar/Bat Mitzvahs, Birthday Celebrations
- Firework shows and events

Various Corporate Team Building Programs – CA:

- “Hang Loose” – Polynesian theme
- “Ultimate Team Challenge” – Various competitive team building activities
- “Games of the Olympiad” – Olympic, physical team building
- “The Race” – Activities based on The Amazing Race
- “Extreme Chef” – Team building activities while cooking



MARKETING PLAN

(DRAFT)

AGENDA

Marketing Plan [DRAFT]

Here's what we'll cover:

- In-House SFC Marketing Team
- Why - Goals
- Who – Target Audience & Personas
- How – Budget
- What – Campaigns By Goal
- When – Timeline for Execution



DIGITAL ACTIVATION



TRAINING & SUPPORT



STRATEGY



PROJECT MANAGEMENT



GRAPHIC DESIGN



CONTENT DEVELOPMENT

SFC TEAM: IN-HOUSE AGENCY

AT YOUR FINGERTIPS



WHY

What do we need to accomplish with our marketing dollars and activities? Here are our goals.



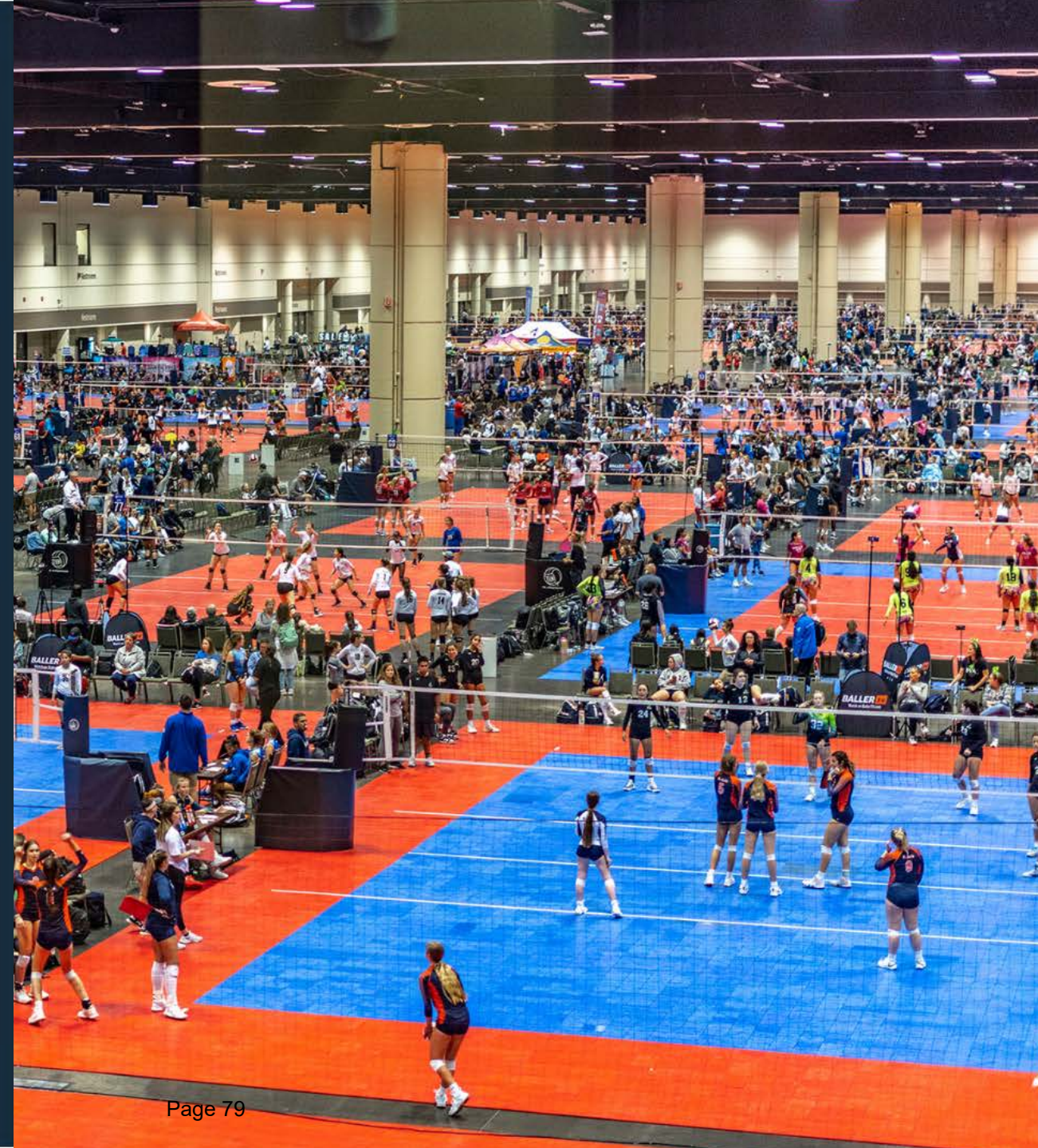
REVENUE GOALS (SIMILAR FACILITY)

Year 1 Operating Revenue

Total Revenue	Year 1
Local Programming	\$123,204
Facility Rentals	\$1,898,004
Events & Tournaments	\$283,704
Merch/Pro Shop	\$144,000
Sponsorship	\$500,000
RV	\$502,005
Hotel Rebates	\$74,128
Parking	\$490,225
F & B	\$1,660,880
Total Revenue	\$5,676,150

WHO

Who do we need to reach with our brand and marketing systems?



TARGET AUDIENCES

WHO WE NEED TO REACH

GOALS:

1. Position Cabarrus Arena & Events Center as a premier, regional & national event destination.
2. Create a “local buzz” and excitement in the community around the events and offerings of the center.
3. Build and activate a rich community database in order to drive revenue through local programs.



TARGET AUDIENCES:

1. Event owners, industry vendors and publications, tourism professionals, travel coaches and families.
2. Community stakeholders, elected officials, business owners/leaders, sports club operators, corporate sponsors & residents.
3. Residents with an emphasis on active families with children as well as sports and recreation participants and young professionals.

TARGET AUDIENCES

DEVELOPING PERSONAS

We use mobile data to learn more about our local audience.

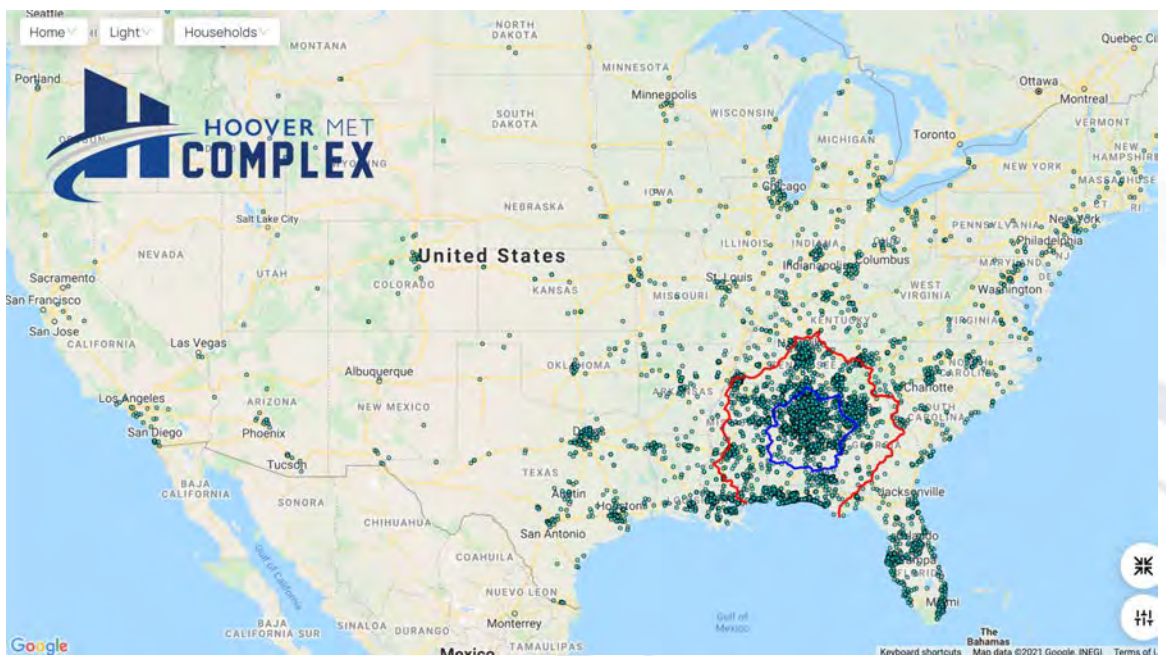
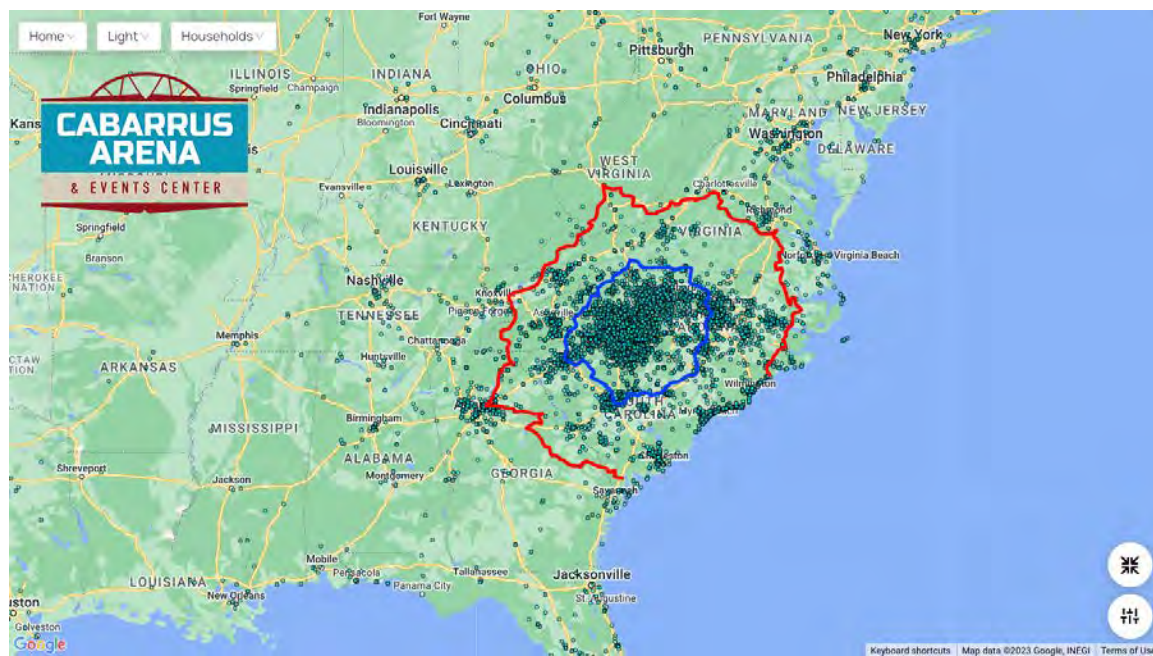
We generate reports on like properties, local assets with similar offerings, and other local business to learn more about our future consumer behavior.

Next, we take a deeper dive in the audiences most likely to become customers using profiles we call personas. We utilized two similar centers that would be potential draw for customers and their characteristics.



TARGET AUDIENCES

DEVELOPING PERSONAS WITH COMPARABLE CENTERS



HOW

How will we allocate our marketing dollars
to reach these audiences?



MARKETING BUDGET (SIMILAR FACILITY)

BY MAJOR CHANNEL

Digital Marketing - \$ 63,700		Sports Tourism - \$ 11,000	
SEO	\$10,000	Printed Materials	\$3,500
Videography	\$40,000	SF Network Co-Op	\$7,500
Web Maintenance	\$13,200		
Community Awareness & Database Building - \$ 165,870			
Radio Campaign	\$153,300	Paid Social Media	\$20,000
Community Events	\$5,000	State/Local Guides	\$5,000
		Local Sponsorships	\$4,000
Grassroots	\$0	Contingency	\$10,000

TOTAL BUDGET: \$272,000

- Budget reflects creating a strong online awareness and two primary campaigns to achieve facility goals
- Campaigns support primary goals: revenue, database build for leads/customers and destination & brand awareness of facility.
- **Our goal is to maximize every dollar with all marketing initiatives.**

WHAT

What campaigns will we execute to meet our goals?



CAMPAIGN OVERVIEW: TOURISM AWARENESS

GOAL #1

Position Cabarrus Arena & Event Center as a premier, regional, national and event destination.

As measured by:

- Media Pick-Ups & Stories
- Website Traffic
- Inbound Booking Requests

In partnership with Business Development, driving these outcomes:

- Event/Tournament Bookings
- Partnership Development – Clubs, Event Owners

STRATEGY:

Tourism Brand Awareness Strategy

TACTICS:

Make a Splash in the industry. Create your regional/national footprint in the industry.

- Industry Conference Participation – Fall & Spring
- Utilize the SF NETWORK Booking Platform Inclusion
 - Tradeshows
 - PR/ National Media
 - Digital/Web
- Create destination awareness campaigns – Social, Video, Traditional Media, Google My Business
- Earned Media & Press Releases



**NATIONAL MEDIA
BOOKING PLATFORM
EVENT BOOKING
TALENT DATABASE
BRAND ACTIVATION
VENDORS & PARTNERS
IN-HOUSE TICKETING
PROPRIETARY LODGING
PHOTOGRAPHY SERVICES**

SFNETWORK >>>

THE NATION'S LARGEST & FASTEST GROWING NETWORK OF SPORTS & RECREATION FACILITIES



CAMPAIGN OVERVIEW: COMMUNITY AWARENESS

GOAL #2

Create a “local buzz” and excitement in the community around the events and offerings of the center.

As measured by:

- Local media coverage/stories
- Social & Web Traffic/Engagement
- Inbound Rental Requests

In partnership with Business Development, driving these outcomes:

- Facility Rentals
- Sponsorship Sales
- Local Partnerships
- Local Support

STRATEGY:

Drive community awareness and create a memorable experience.

TACTICS:

Create a “Teaser Campaign” to get local buzz going.

Consistent facility updates and news to the local community-web and through social

- Activation at community events –Press releases – share the good news.
- Radio campaign – local stations spots/PSAs
- Grassroots –signage, flyers, tours
- Video – create a video highlighting the center to share on social/web
- State/local advertising

CAMPAIGN OVERVIEW: DATABASE ACTIVATION

GOAL #3

Build and activate a rich community database in order to drive revenue through local event rentals.

As measured by:

- Online email address capture
- Database Growth
- Website Traffic
- Social Followers

In partnership with Business Development, driving these outcomes:

- Center Events/Parties/Graduations
- Local Sports Programs

STRATEGY:

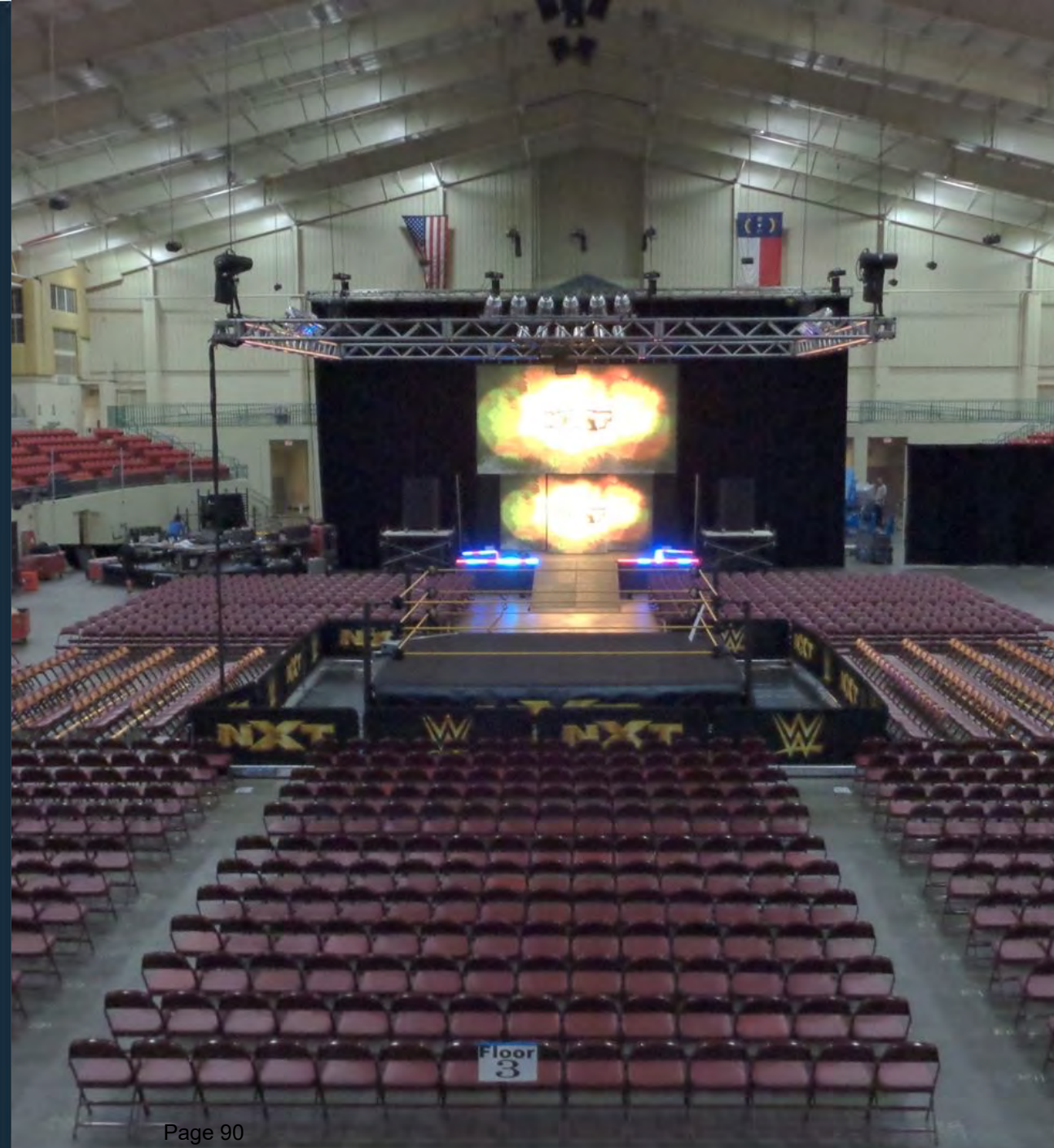
Create a lead generation strategy for database growth to drive rentals.

TACTICS:

- Paid social media – create awareness and strong CTA to drive registrations
- SEO – capture potential bookings with appropriate keywords and website ranking
- Email marketing – begin with newsletter awareness content and then conversion-based emails
- Consistent facility updates and news to the local community online through social & PR
- Activation at community events – be where the people are!
- Website-drive newsletter signups
- Local organization ad/sponsorship opportunities

WHEN

Getting from zero to 100. Draft timeline of delivery and execution.



11

11/11/2016

3 PRIMARY CAMPAIGNS

Campaign #1

Tourism Brand Awareness:

- *Begin creating regional/national footprint*

Campaign #2

Community Awareness:

- Generate the "buzz" in the community

Campaign #3

Database Activation:

- *Lead capture tactics for database build*

MARKETING CAMPAIGN PLANNER - DRAFT																																																
		OCTOBER					NOVEMBER				DECEMBER				JANUARY				FEBRUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER	
	WEEK OF:	5	10	17	24	31	7	14	21	28	5	12	19	26	3	10	17	24	31	7	14	21	28	5	12	19	26	3	10	17	24	31	7	14	21	28	5	12	19	26								
Campaign #1 - Tourism Brand Awareness																																																
Tourism Media-Sports Destination Management																																																
SP Network Co-Op																																																
Printed Materials																																																
State Guide/Website																																																
Tourist Press Focus																																																
Campaign #2 - Community Awareness																																																
Tourism Sign																																																
Radio Advertising (A/B/P/S)																																																
Graffiti																																																
Community Events																																																
Sneak Look(s)																																																
Social Media Organic																																																
Printed Materials (under)																																																
Visitor Guide/Website Ads																																																
Community Press Focus																																																
Campaign #3 Database Activation/Build																																																
SEO																																																
Paid Social Media																																																
Organic Social Media Posts																																																
Local Organic Events & Sponsorship Opportunities																																																
Monthly Newsletter																																																
Email Marketing																																																
Self Up Activities																																																
Website Development																																																
Microscopy & Photography																																																
Email Marketing Provider																																																
Community Groups																																																
Website (Full/Multi-channel)																																																

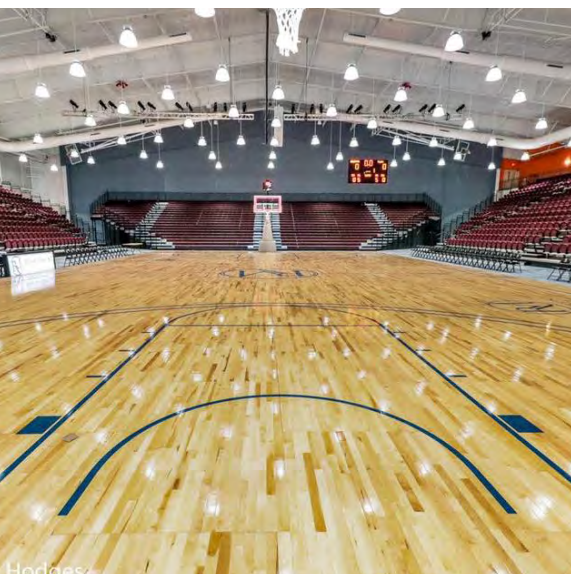


MARKETING PLAN

(DRAFT)



REFERENCES



SPORTS TOURISM • COMMUNITY RECREATION • INDOOR

ROCKY MOUNT EVENT CENTER



ROCKY MOUNT EVENT CENTER

ROCKY MOUNT, NC

The Rocky Mount Event Center is an indoor sports destination located in the heart of Downtown Rocky Mount that is unlike any sporting event center in eastern North Carolina. The Event Center is unique because it not only caters to sporting tournaments, but trade shows, competitions, private events, and other premier amenities.

The Advisory Team was contracted to provide a feasibility analysis, financial forecast, and economic impact analysis as well as providing consulting and advisory services throughout the capital acquisition phase. The Development Team served as the owner's representative and FF&E procurement. The Management Team provided pre-opening services and is currently contracted as the full-time management partner.

PROJECT STATISTICS & PERFORMANCE HIGHLIGHTS

Size: 165,000 ft²

Features:

8 Basketball/16 Volleyball Courts

10 Configurable Meeting Rooms

Observation Mezzanine

4 Party Rooms

FIRM ROLES & SERVICES

Advisory: Financial Forecasting
Program Planning
Economic Impact Analysis
Community Engagement

Development: Venue Planning

Management: Pre-Opening Management
Full-Time Management

REFERENCE

Elton Daniels, Assistant City Manager

City of Rocky Mount, NC

(252) 972-1325

Email



FORT BEND COUNTY EPICENTER

FORT BEND COUNTY, TX

The EpiCenter is an estimated 190,000 square foot, 8,500 seat new multi-purpose event center to be located in Rosenberg, Texas, which provides but not limited to, public/consumer shows, tradeshow, sports and recreation, spectator events, community/civic events, agriculture/livestock/equestrian shows, festivals and fairs, conferences, meetings, and other activities. The estimated opening is June 2023.

SFC provided financial forecasting for the project, outlining a five-year pro forma and 20-year revenue forecast. SFC's Development team was engaged to provide venue planning, design consultation, and FF&E procurement. SFC's management team was later selected to provide pre-opening and ongoing full-time management for the facility.

PROJECT STATISTICS & PERFORMANCE HIGHLIGHTS

Size: 290,000 ft²

Features:

8,500-seat multi-purpose arena	Covered, outdoor pavilion
Multi-purpose court space	Meeting & Event Rooms
Full Kitchen, Concessions, & Catering	

FIRM ROLES & SERVICES

Advisory:	Financial Forecasting	Development:	Venue Planning
			FF&E Procurement

Management: Pre-Opening Management
Full-Time Management

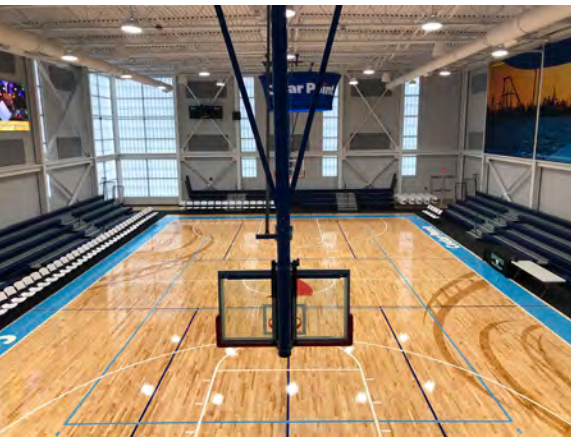
REFERENCE

Kevin Matocha, Asset Manager

Stonhenge Companies, LLC

(713) 562-1998

kevin@stonehengeco.net



SPORTS TOURISM • COMMUNITY RECREATION • INDOOR



CEDAR POINT SPORTS CENTER

SANDUSKY, OH

Cedar Point Sports Center is an exciting tournament destination located at the Roller Coaster Capital of the World. Families won't forget their "tourna-cation" experience playing in the state-of-the-art center and experiencing the thrills of the adjacent Cedar Point Amusement Park.

The Advisory team completed a market and feasibility analysis, financial forecast, and economic impact analysis. The Development team served as owner's representative for design and facility layout and FF&E procurement. The management team was then contracted with both pre-opening and ongoing full-time management. By grand opening in January 2020, the SFC team had already beat the forecast for booked events for year one, with direct spending and hotel projections well ahead of the goal.

PROJECT STATISTICS & PERFORMANCE HIGHLIGHTS

Size: 145,000 ft²

Features:

10 Basketball / 20 Volleyball Courts	Championship Court/Arena
Full-Service Cafe and Concessions	Play Climb Area and Party Rooms
Second-Story Mezzanine	Direct Access to Amusement Park

FIRM ROLES & SERVICES

Advisory:	Financial Forecasting	Development:	Venue Planning
	Program Planning		FF&E Procurement
	Economic Impact Analysis		
Management:	Pre-Opening Management		
	Full-Time Management		

REFERENCE

Lisa Brady, Director of Business Development (former)

Cedar Fair

(216) 402-3685



SPORTS TOURISM • COMMUNITY RECREATION • INDOOR



JOHN T. RHODES MYRTLE BEACH SPORTS CENTER

MYRTLE BEACH, SC

The Myrtle Beach Sports Center has a fantastic central location in Myrtle Beach just steps from the beach, shopping, and dining. The facility features 100,000 square feet devoted to a myriad of indoor sports in addition to trade shows, special events, and conventions.

The Advisory Team was engaged to produce the initial market analysis and community needs/ demand assessment phase, a detailed financial forecast and economic impact analysis, an organizational structure, a development timeline, and on-site presentations. The City then contracted SFC for a full suite of pre-opening services, including a Pre-Opening Development Plan & Timeline as well as the setup and implementation of management and operating systems for the complex and the business. This led to a Full-Time Management agreement, which was renewed in 2019.

PROJECT STATISTICS & PERFORMANCE HIGHLIGHTS

Size: 100,000 ft²

Features:

4 Basketball / 8 Volleyball Courts	1,500 Spectator Seats
4 Flex Rooms	Mezzanine Viewing Area
1 Multipurpose Room	12-Screen Video Wall

FIRM ROLES & SERVICES

Advisory:	Financial Forecasting	Development:	Venue Planning
	Program Planning		Procurement
	Economic Impact Analysis		
	Community Engagement		
Management:	Pre-Opening Management		
	Full-Time Management		

REFERENCE

Fox Simons, City Manager

City of Myrtle Beach, SC

834-918-1016, fsimons@cityofmyrtlebeach.com



SPORTS TOURISM • COMMUNITY RECREATION • INDOOR/OUTDOOR



ROCKY TOP SPORTS WORLD

GATLINBURG, TN

Welcome to an award-winning sports and entertainment destination. This 80-acre state-of-the-art sports campus is in the heart of the Smoky Mountains. Rocky Top Sports World is located in Gatlinburg, Tennessee and is the premier indoor/outdoor sports destination for sports teams and youth sporting events and tournaments in the Southeast region.

The Advisory team was engaged to produce the initial market analysis and community needs/demand assessment phase, which included strategic planning, key stakeholder and user group interviews, as well as a detailed financial forecast and economic impact analysis, an organizational structure, a development timeline, and onsite presentations. The City/County then contracted Sports Facilities Management to become the full-time management entity for this sports tourism destination. SFC has beat economic impact projections each year, even producing \$49mm in direct spending during the 2020/2021 pandemic year.

PROJECT STATISTICS & PERFORMANCE HIGHLIGHTS

Size: 80 acres, 86,000 ft²

Features:

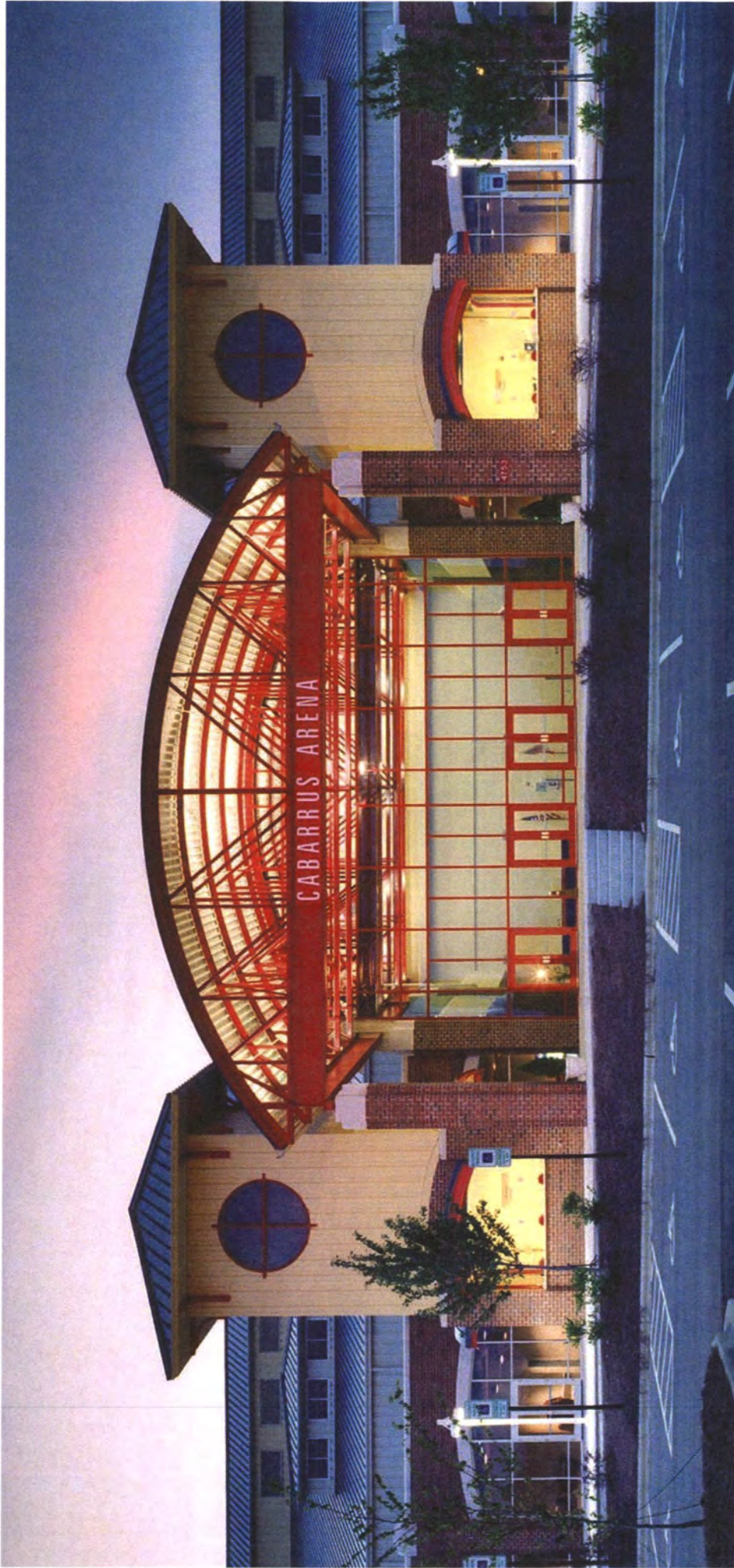
6 Basketball / 12 Volleyball Courts	4 Additional On-Site Courts
6 Synthetic Turf Fields	3 Multi-Purpose Rooms
1 Natural Grass Field	Board Room

FIRM ROLES & SERVICES

Advisory:	Financial Forecasting	Development:	Procurement
	Program Planning		
	Economic Impact Analysis		
Management:	Pre-Opening Management		
	Full-Time Management		

REFERENCE

Allen Newton, Executive Director
Sevier County Economic Development
 (865) 428-2212, allennewton@hotmail.com



REQUEST FOR PROPOSAL (RFP)

MANAGEMENT SERVICES FOR CABARRUS COUNTY ARENA & EVENTS CENTER



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ASM GLOBAL

800 W. Olympic Blvd., 3rd Floor
Los Angeles, CA 90015

+1 213 799 2378
asmglobal.com

April 28, 2023

Mr. Rodney Harris
Deputy County Manager, Cabarrus County
PO BOX 707
Concord, NC 28026

Re: Management Services for Cabarrus County Arena & Events Center

Dear Mr. Harris:

We are thrilled to submit our response to your Request for Proposal for Management Services for the Cabarrus County Arena & Events Center ("Complex"). As your strategic management partner for the Complex, we will leverage our proven experience, resources, and insight to:

- Position the Complex & Cabarrus County as innovative industry leaders
- Augment the overall venue experience, aligning strategic priorities with guests' needs
- Incorporate new, innovative ASM Global resources & programs
- Increase overall sales & new and existing operating revenues

INTRODUCING ASM GLOBAL BOLD INNOVATORS WITH A LEGACY OF SUCCESS

ASM Global was established through the 2019 merger of global venue and event strategy and management leaders SMG – Cabarrus County's ("County") long-term management partner – and AEG Facilities. As the unrivaled leader in venue management, we manage more than 350 venues across five continents. Our passion for business and community development drives our **INNOVATIVE INITIATIVES AND FINANCIAL PLAN** for the County.

The **NEW ASM Global** offers the County:

- Dedicated focus on innovation, creativity & reimagined guest experiences
- Support to position the Complex & the County as a local, regional, and national premier destination
- Expanded leadership, resources & support for Complex initiatives and events

FUELING LOCAL GROWTH: PAST, PRESENT & FUTURE SUCCESS

Deeply invested in the local community, ASM Global has managed the Complex since 2005, under the strong leadership of Kenneth Robinson. **Over the last 18 years, we have formed close relationships with the County and local partners, leading to monumental successes including:**

- **70% Growth in Annual Event Days**
- **Increased Annual Net Operating Revenues by over 45%**
- **Decreased Annual Operating Deficit by 48%**

**ASM GLOBAL**

800 W. Olympic Blvd., 3rd Floor
Los Angeles, CA 90015

+1 213 799 2378
asmglobal.com

Best of all, we're not done yet. Our local team, with corporate resources and support, is ready to build upon our past achievements. Fueled by our entrepreneurial spirit, industry insights, and global resources, we are positioned to deliver even more value to the County. With our proven experience and track record at the Complex, there will be zero learning curve as we enter the next phase of unparalleled connection and entertainment.

EVOLVING WISELY: HERE'S HOW WE DO IT

We're proud of all we have accomplished together and look forward to enhancing our partnership with our plan for the Complex:

- Maximize existing & new revenue streams through innovative technology and partnerships
- Engage County residents, community and cultural groups & arts organizations, making it easy for them to leverage the Complex to meet their needs
- Increase opportunities for diverse enterprises to do business with the Complex
- Continue to position the Complex & the County as industry thought leaders

DRIVING INNOVATION WITH DEDICATED CAPITAL INVESTMENT

As detailed in our Financial Proposal, ASM Global will provide a **SIGNIFICANT INVESTMENT OF UP TO \$550,000** and is proposing a performance based structure with a reduction of the fixed fee.

We understand the investment uses and allocations will be determined and approved by the County. ASM Global's initial recommendations are based on aligning with County goals, our deep passion for and commitment to the local business community, and Complex operations.

LET'S INNOVATE & ELEVATE TOGETHER

The ASM Global team appreciates the opportunity to continue our partnership with the County and the Complex. We look forward to working with the County and our destination partners to create new, innovative opportunities for all. As President & CEO of ASM Global, I attest to the accuracy of the information provided in our response.

Together, we will elevate the Complex and Cabarrus County's position as a premier destination for live events, entertainment, and public assembly. Our **DEDICATED TEAM, GLOBAL RESOURCES,** and **LOCAL PASSION** will reward your continued confidence and trust in ASM Global.

Sincerely,

Ron Bension
President & CEO



EXECUTIVE SUMMARY

COMPANY OVERVIEW

INTRODUCING THE NEW ASM GLOBAL BOLD INNOVATORS WITH A LEGACY OF SUCCESS

ASM Global's operating philosophy incorporates the same principals of its Legacy Companies, AEG Facilities and SMG, providing asset-based management services to its government-owned and private clients. Our philosophy is to provide the best venue management, marketing, maintenance, operations, food & beverage, and booking services for venues around the world.

MISSION STATEMENT

ASM Global is committed to realizing the potential of every venue we manage, to create amazing experiences for our guests and exciting opportunities for our team members, while delivering the highest value for all stakeholders. As part of our mission, ASM Global is committed to increasing global equality and sustainability.

COMPANY HISTORY

WITH OVER 350 VENUES WORLDWIDE AND A LEGACY THAT SPANS MORE THAN 50 YEARS, ASM GLOBAL IS THE EVENT AND ENTERTAINMENT INDUSTRY'S LEADING VENUE MANAGEMENT PROVIDER.

We operate in markets across the country and represent diverse clients ranging from publicly owned facilities and major league professional sports teams to college sports departments and much more.

We are the only public assembly venue management company to provide a professional asset management approach to day-to-day venue operations, providing the strongest fiduciary stewardship of publicly owned facilities in the industry.

- Leaders in revenue optimization & cost management, our capabilities drive industry-leading financial performance for partners around the world
- Local leadership & experience brings to life successes and best practices from all over the world
- Frontline venue expertise provides unsurpassed execution on-the-ground
- 360° venue management includes industry-leading operations, content programming & latest data-driven marketing disciplines



ASM GLOBAL IS
THE LEADER IN LIVE

—
164 MILLION
GUESTS

—
50,000
TEAM MEMBERS

—
20,000+
LIVE EVENTS ACROSS
SPORTS, MUSIC,
ENTERTAINMENT AND BUSINESS

—
350+
PREMIERE VENUES

—
5
CONTINENTS

FACILITY MANAGEMENT SERVICES

ASM Global provides a full range of management services for each of our arenas, convention centers, and multipurpose venues. Utilizing our global scale and knowledge, our national and regional experts empower and support our local General Manager and team to drive content, revenue, and value.

We customize our management services to meet the needs of the Complex. Our team oversees key functions including finance, human resources, game day and event services, asset protection (maintenance and capital planning), operations, marketing, sales, event booking, and supervision of third-party subcontractors.

Our operational best practices program is the cornerstone of the excellence that ASM Global is known for. Developed through years of experience and industry knowledge, we have documented operating procedures and systems that enable our general managers and achieve the highest quality operating standards.

AREAS OF EXPERTISE

REVENUE MANAGEMENT

- Performance Optimization
- Premium Experiences
- Revenue Audits
- Private Events

ACCOUNTING & FINANCE

- Budget preparation
- Capital expenditure planning
- Finance, accounting & auditing

CONSTRUCTION & PLANNING

- Design & construction management
- Maintenance & engineering
- Peripheral real estate assistance
- Sustainability planning & LEED certification

MARKETING & SALES

- Advertising & sponsorship sales
- Marketing services
- Media & public relations
- Lead Generation

VENUE OPERATIONS

- Box office operation
- Crisis planning & management
- Customer service training
- Food & Beverage operations
- MIS & technology services
- Parking operations
- Risk management
- Third-party vendor management
- Venue & facility maintenance

CONTENT & PROGRAMMING

- Live Entertainment Division support
- Exclusive Ticketmaster partnership
- Room2Run initiatives
- Event creation, booking & operations
- Event analytics & reporting



**OUR SERVICES & SYSTEMS ARE CUSTOMIZED
FOR THE COUNTY AND THE COMPLEX**

FOOD & BEVERAGE SERVICES

SAVOR: OUR AWARD-WINNING CULINARY DIVISION

Established in 1983, SAVOR develops location specific food & beverage experiences for each venue we serve. SAVOR operates in more than 200 specialized venues in markets of all sizes, including sports and entertainment venues, convention centers, amphitheaters, aquariums, and other facility types. Our reputation is built on our ability to create menu programs and incorporate local concepts for our clients, allowing them to achieve higher revenues and profits.

MISSION & GOALS

The SAVOR mission is to enrich the overall guest experience through food. As the leading authority in the experiential food & beverage space, we deliver exceptional catering and concessions services and create memorable experiences for the world's largest events.

For the County, SAVOR delivers winning, relevant, and local flavors while maximizing returns. We will incorporate the following creative initiatives into our food & beverage program:

- Local products, brands & restaurateurs providing opportunity for area businesses
- Mobile food & beverage ordering to deliver convenience for guests
- Sustainability best practices to reduce negative environmental impact
- New, exciting destinations & spaces to elevate the Complex image and brand



BENEFITS



CUSTOM FOOD EXPERIENCES.

We create thousands of customized and localized culinary offerings that leverage high quality, locally sourced ingredients for wholesome, flavorful, and delicious menu items.



HYPER-LOCAL PURCHASING POWER.

Our focus on local and organic products includes sustainable seafood, meats raised without antibiotics and other farm-to-fork favorites picked at the peak of ripeness and prepared within hours of being harvested.



NOT YOUR AVERAGE CONCESSIONS.

SAVOR knows that guests and fans still crave traditional game-day and on-the-go bites, but we don't settle for anything less than extraordinary. Our fresh ingredients and creative twists take standard fare to the next level.

CUSTOMIZED MANAGEMENT PROGRAMS

Over the past 50+ years, we've developed and launched operating tools that set us apart from the competition. As part of our value proposition, these cloud-based platforms are fully customizable for every venue and client.

ROOM 2 RUN

PERFORMANCE MANAGEMENT (R2R)

A customized data-driven program designed to optimize revenue and measure 'same venue' performance across the ASM Global facility network. It measures and tracks revenues across seven distinct categories, resulting in a tool that drives record-breaking operating performance across all venues.



ASM has partnered with Qualtrics, the leader and creator in the Experience Management (XM) category, to develop a customized tool for measuring customer feedback and transform the way venues manage and improve the four core experiences of business— customer, employee, product and brand.



Customized specifically for ASM Global, Infor is a calendar management system that allows ASM Global venues to book events, track leads, manage sales and plan events. It is also integrated into the venue's food and beverage system to allow seamless and efficient operations.



ASM Global provides in-house marketing expertise to further enhance revenue-generating initiatives and promote venues' success. The team specializes across various disciplines including Show Marketing, Public Relations, Creative Services, Digital & Social Marketing, Experience Management and supports all Lines of Business.



Our proprietary online training platform educates venue staff and teams about essential best practices and skills that drive consistency among our venue locations. With over 2,500 accessible courses, ASM Global Academy addresses the unique challenges our team members face while creating exceptional guest experiences.



ASM Global Acts is a centralized corporate social responsibility program dedicated to equity and sustainability across our global footprint. The program focuses on driving meaningful actions and measurable results at both corporate and community levels.



Built specifically for ASM Global, ALTUM is a computerized management system (CMMS) and enterprise asset management (EAM) utilized for tracking maintenance performance and records. With the ability to be accessed from any device 24/7, the platform extends the useful life of all of our assets.



Accessible to all ASM Global venues, OSCAR (Operations Support through Communications and Resources) is an active digital library that houses our standard operating best practices. OSCAR allows us to disseminate our unparalleled operational knowledge base to over 2,000+ users across the world, helping to drive consistency and high-quality experiences across each of our venues.

LOOKING AHEAD - BUILDING ON SUCCESS

We are incredibly proud of our performance over the years and vow to strive for greater defined success by innovating the live event experience and expanding our commitment to the community, our employees, and visitors to Cabarrus County. **Acting on the adaptability, resourcefulness, farsighted strategies, and growth investments of our organization, we are confident in our ability to fuel the continued evolution of the Complex through, and beyond, these unprecedented times.** Moving out of the “Covid Years” and looking towards the future, we understand the importance of developing a strategic business plan to continue to evolve and maximize the potential of the Complex, a tremendous centerpiece public asset we are proud to be entrusted with as your steward.

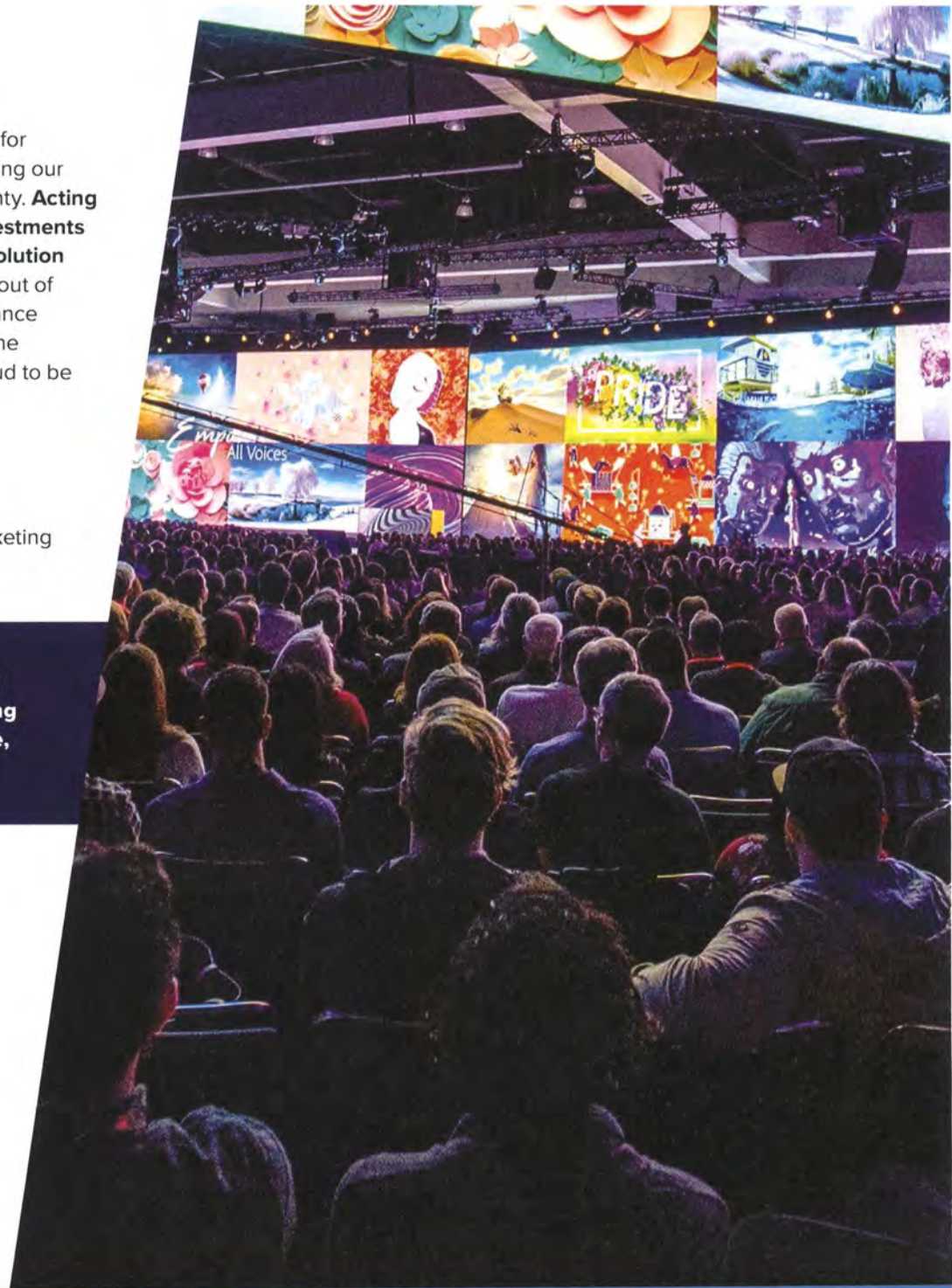
ASM GLOBAL IS A NEW COMPANY

Throughout our response we provide details on ASM Global’s new vision, programs, resources, and initiatives that will support the operations and marketing of the Complex into the future.

We have paired our local management team with corporate ASM Global national resources to develop a business plan geared towards generating new revenue, engaging the community, enhancing the event experience, and elevating the services offered to our valued clients and guests.

ALIGNING THE COMPLEX WITH FUTURE INDUSTRY TRENDS

ASM Global’s leading industry position and resources will be dedicated to ensuring the Complex delivers what event organizers, attendees, and guests will want, need, and care about in the future. **Our initiatives and investments detailed in this response will capture the industry trends ASM Global creates and anticipates, with a focus on creativity, collaboration, and community.** This includes the beneficial uses of technology and ASM Global’s new data tools with trends being firmly rooted in delivering on the physical spaces. ASM Global’s position in and deep understanding of the industry provides the foundation of our evolving plan for the Complex and Cabarrus County.



ASM GLOBAL GROWTH INITIATIVES FOR THE COMPLEX

We are incredibly grateful for the opportunity to be the Complex's venue management firm and proud of the accomplishments we achieved together. It is now time to look forward to the future, to build a plan that will take us into the next decade of success. ASM Global will:

- Bring innovative ideas to maximize existing & generate new revenue streams
- Work with Explore Cabarrus, destination partners & the County to position Cabarrus Arena & Events Center as part of the reimagined strategy to drive economic impact in the County
- Engage County residents, community and cultural groups, and arts organizations to utilize the Complex at a higher level
- Increase opportunities for diverse business enterprise at the Complex
- Continue to position the County & the Complex as industry thought leaders

As detailed further in our response, **ASM Global's targeted, strategic initiatives include:**

DIGITAL NETWORK INSTALLATION

ACTION ITEM: To promote the marketability and desirability of the Complex and the County for convention, trade show and meeting, and live entertainment events, ASM Global proposes to implement a strategically spaced Digital Signage network to increase visibility, create new revenue streams from sponsorships, and create the ability to communicate with all attendees at the Complex and the local community.

ANTICIPATED RESULTS:

- Elevated customer service with revenue generating opportunities
- Provides additional resources for show producers & event organizers
- Opportunity for event organizers to buy into the network
- Opportunity to monetize content & generate revenue through the network
- Opportunity for the local community to engage with the Complex for use of digital assets



CONCESSIONS BRANDING & INNOVATION

ACTION ITEM: ASM Global believes that refreshing existing concessions stands both aesthetically and operationally will be more inviting to guests, provide better service options, and a more diverse menu including local and branded items.

ANTICIPATED RESULTS:

- Increased number of transactions per event
- Elevated customer service through shorter wait times & menu selections
- Opportunity to introduce locally-known brands into the concessions menu
- Increased sponsorship revenue associated with offering local brands in some item product categories

GROW FOOD & BEVERAGE POINTS OF SALE

ACTION ITEM: ASM Global has seen significant growth in revenue in venues where portable concession stands can be used to expand product selection and provide additional points of sale in addition to traditional concessions stands. We propose to introduce multiple portable concession stands with flexibility for use in all areas of the Complex.

ANTICIPATED RESULTS:

- Increased concessions revenue
- Better guest experience through more product selection & decreased wait times
- Potential sponsorship growth through branding of these portable points of sale

POSITIONING CABARRUS ARENA & EVENTS CENTER AS A COMMUNITY ASSET

ACTION ITEM: ASM Global is committed to a higher focus on engaging community and not-for-profit organizations that could benefit from the brand, use, and servicing of the Complex to elevate their causes, create awareness, and raise funds. As a significant public asset, the Complex is the “people’s” venue and should be viewed and embraced locally and regionally as an asset that services and supports the entire community.

ANTICIPATED RESULTS:

- Increased utilization of the venue
- Organic growth in business meeting & social event revenue as more of the community is exposed to the services available at the venue



EXPAND EMPLOYMENT OPPORTUNITIES

ACTION ITEM: ASM Global recognizes that the impact of a venue on the community goes beyond hosting events and proposes to reimagine who delivers some aspects of customer service at the Complex. There are many ways the Complex can partner with community groups, non-profit organizations, and others engaged in the betterment of the community to provide labor needed for producing events while raising funds to support their work.

ANTICIPATED RESULTS:

- Over \$100,000 per year dispersed to community groups for their work at venue events.
- Increased profitability through a decreased reliance on staffing agencies as labor sources for many events

ENHANCE YOUTH SPORT TOURISM

ACTION ITEM: Working in collaboration with Explore Cabarrus, and to support and grow the Complex's established success within the youth sports industry, ASM Global's investment in a bleacher system to enhance the marketability of the Complex.

ANTICIPATED RESULTS:

- Elevated customer service with revenue generating opportunities
- Provides additional resources for event & tournament organizers
- Increased community economic impact

SALE OF VENUE NAMING RIGHTS

ACTION ITEM: If desired by the County, ASM Global Partnerships will value, package, and sell a venue naming rights sponsorship for the Complex.

ANTICIPATED RESULTS:

- Generate significant annual revenue to minimize the operating subsidy
- Provide new branding & marketing opportunities for the Complex



COMPENSATION MODEL

Our objective is to align our mutual goals with a fee structure that rewards ASM Global for performance and positions the Complex as a centerpiece asset for the community that engages everyone! As detailed in the Financial Plan section of our response, below is a summary of ASM Global's proposed compensation model to the benefit of the County.

A significant ASM Global **capital contribution of up to \$525,000** to be invested in areas of the Complex approved by the County. ASM Global envisions the contribution being used for initiatives that grow revenue, increase the marketability of the Complex, and elevate the overall event experience.

A **reduced Base Management Fee** and more performance-based structure incentivizing ASM Global to achieve both quantitative and qualitative goals.

A total **\$25,000 community-based commitment** from ASM Global to a local scholarship fund to assist with the development of Cabarrus County home-grown future leaders in the travel and tourism industry.

LET'S INNOVATE & ELEVATE, TOGETHER

The ASM Global team appreciates the opportunity to continue our successful relationship. We look forward to working with the County, the Complex, and destination partners to create new, innovative opportunities for all. ASM Global understands and embraces the complete scope of work required to manage, operate, and market the Complex on behalf of the County.





OPERATIONAL PLAN

CORPORATE VISION

MISSION STATEMENT

ASM Global is committed to realizing the potential of every venue we manage to create amazing experiences for our guests and exciting opportunities for our team members, while delivering the highest value for all stakeholders. As part of our mission, ASM Global is committed to increasing global equality and sustainability.

AT THE CABARRUS ARENA & EVENTS CENTER, WE ACCOMPLISH THIS BY ENHANCING THE ECONOMIC FABRIC AND QUALITY OF LIFE IN THE COUNTY THROUGH:



PARTNERING WITH EXPLORE CABARRUS

To promote the County and region as an entertainment destination and to provide excellent customer service to our guests, visitors, partners, and clients.



PROVIDE JOB OPPORTUNITIES & ENHANCE TOURISM EFFORTS

Working in partnership with Explore Cabarrus and other hospitality partners to promote the Complex and County as an event and tourism destination and locally as a social event destination.



SERVICING NEEDS

Of all event organizers with first-class service, while providing attendees and participants with an event experience that exceeds their expectations.

ASM Global's corporate philosophy is simple, provide the best venue management, marketing, maintenance, operations, food & beverage, and booking services for venues around the world, including:

- Arenas & Event Centers
- Stadiums
- Convention & Exhibition Centers
- Theaters & Performing Arts Centers
- Amphitheaters
- Mixed Use Facilities

ASM Global's operating philosophy provides asset-based management services to its municipal and private clients.



ASM GLOBAL GOALS AT CABARRUS ARENA & EVENTS CENTER

ASM Global and SAVOR have aligned our goals with those of our clients to maximize the utilization and revenue of the venues we manage, while minimizing costs. We achieve this by providing each of our local management teams with the regional and corporate resources needed to:

- Book the best live events in the industry
- Provide fiduciary stewardship to their clients
- Promote each venue as a community asset
- Partner with all community stakeholders
- Invest in our staff through training & development
- Get involved in the communities we operate in
- Reduce our carbon footprint to protect the environments we work in & the planet
- Be good corporate citizens, providing small, disadvantaged, minority & women owned enterprises with the opportunity to do business in every venue we operate

“Our experience with Cabarrus Arena & Events Center was amazing...extremely helpful and kind...the planning process was very easy and stress-free. The staff also did well explaining our options regarding food, which was delicious. Our special day ran smoothly and the staff made sure of that. We would definitely recommend this venue to anyone looking for one.”

- Weatherington/Davenport Wedding



EXPERIENCE WITH PUBLIC ENTITIES

ASM GLOBAL HAS WORKED SUCCESSFULLY WITH GOVERNMENT CLIENTS FOR OVER 50 YEARS

Over the last 50 years, ASM Global has served public entities and their related stakeholders by providing fiduciary management of publicly owned assets. ASM Global is experienced at servicing public sector clients. In fact, 92% of our clients are municipal governments, or agencies - just like Cabarrus County.

We understand the operating requirements associated with a publicly managed venue and the importance of financial accountability and transparency. Our local professional staff, with the support of our global resources, are focused everyday on maximizing venue performance for our clients, stakeholders and guests.

Our business philosophy is simple: to go above and beyond to achieve the best results for the municipal partners that we serve. We understand how to balance public and private needs to drive profitability for our governing bodies, and we do not take the trust of our clients lightly. **Every collaborative decision that is made is with the understanding that our work is a reflection of you, our client.**

Once established, this fiduciary role then allows us to go to the private sector and manage the delicate balance between the three standard objectives of our owner clients:

1. Provide the best level of service
2. Manage top & bottom-line revenues
3. Generate economic impact in the Region – through enhanced tourism, quality of life, and promoting growth in the local corporate sector



MOST OF THE CLIENTS WE SERVE ARE GOVERNMENT AGENCIES OR PUBLIC ENTITIES, SO WE KNOW HOW TO PROVIDE THE HIGHEST LEVEL OF ACCOUNTABILITY AND TRANSPARENCY

30+ MUNICIPAL CLIENTS HAVE BEEN WITH ASM GLOBAL FOR OVER 20 YEARS.



FACILITY MANAGEMENT APPROACH

FACILITY MANAGEMENT

OUTSOURCED SERVICES

Our on-site management team, with support from our corporate staff and national network of facilities, provides all services necessary to meet the operational and maintenance requirements of the Complex. We carefully evaluate each service based on quality control and cost, to determine which services should be outsourced to a third-party contractor. ASM Global will continue providing all maintenance, upkeep, and custodial services for the Complex.

ASM Global will ensure that these services will be performed consistent with contractor and manufacturer recommendations and requirements and will be comparable in scope and nature with other comparable facilities. Our full range of services include:

- Adherence to environmental & conservation goals and programs
- Coordination & oversight of subcontractors and temporary labor
- Coordination with the requirements of the County
- Event Set-up & teardown
- Pre-event preparation
- Standard & custom designed operating procedures

ASM Global prefers to provide as many services in-house as possible to avoid extra cost. However, there are services that will need to be outsourced to third parties and we will utilize our operating best practices and negotiated Master Service Agreements to ensure that the Complex is maintained in a first-class manner.



MAINTENANCE & REPAIR

Our on-site management team, supported by our corporate operations team will provide all services necessary to meet the operational and maintenance requirements of the Complex. ASM Global places emphasis on three core areas of maintenance as part of our facility management services for the County:

1. **Life Safety-Related:** Consistently inspect all areas of the Complex to ensure compliance with all applicable life safety codes and regulations.
2. **Capital Cost Avoidance:** Through the use of ALTUM, our customized CMMS program, we will continue to complete preventative maintenance work orders to extend the useful life of equipment and avoid down time for repair and replacement.
3. **Aesthetic Appearance:** Non-safety and non-efficiency related projects that contribute to the 'brand' and appearance of the Complex. These projects vary in scope and in size, and may include areas such as fixture replacement, seat cleaning projects to exterior grounds maintenance.

ASM Global ensures that maintenance services are performed consistent with contractor and manufacturer recommendations. ASM Global employs full-time personnel to staff its maintenance and engineering departments. These individuals are specifically dedicated to servicing the operational and maintenance needs of the Complex, which include:

- Furniture, Fixtures and Equipment
- Life Safety Systems
- Waste Disposal
- Exterior Cleaning
- Grounds Maintenance
- Exit/Entrance Doors



CORPORATE SOCIAL RESPONSIBILITY



OVERVIEW

ASM Global's corporate social responsibility platform, ASM Global Acts, is a renewed and refocused commitment to global equity and sustainability. In addition to establishing a more centralized and intentional corporate social responsibility program, ASM Global focuses its efforts on meaningful actions and measurable results at both the corporate and community level.

Aligned with many of the United Nations Sustainable Development Goals, the initiative is an extension of ASM Global's long-standing commitments of creating a better workplace and more diverse workforce, serving the communities where it operates, and contributing to a healthier environment and planet.

OUR COMMITMENTS



INVEST IN PEOPLE

Create an environment of inclusion and gender equity across our organization, grow the diversity of our business partners around the world, and enable opportunities for our current and future workforce.



PROTECT THE ENVIRONMENT

Reduce waste from the guest experience across our venues, enhance facility efficiency through capital investments, and protect and preserve resources in and around our communities.



STRENGTHEN OUR COMMUNITY

Engage in improving the vitality of our communities, increase philanthropic support through meaningful efforts, and enhance the health and well-being of our co-workers, clients, and guests. ASM Global Acts is an ambitious, structured, and intentional initiative, and one that will drive ASM Global's commitment to creating better communities and a better world.

"ASM GLOBAL TAKES COMMUNITY OUTREACH VERY SERIOUSLY AND HAS EXCELLENT RELATIONS IN THE DIVERSE COMMUNITIES IN WHICH IT OPERATES."

- Allen Hershkowitz, PhD
Chairman and Founding Director, Sport and Sustainability International

SYSTEMS



ASM GLOBAL'S CUSTOMIZED CMMS FOR ASSET PROTECTION

The activities of each member of the maintenance and engineering department are guided and supported by ALTUM, our internal Computerized Maintenance Management System (CMMS) program. ALTUM automatically generates work orders for specific activities based on manufacturers recommended maintenance schedules.

The system then assigns technicians to the appropriate task and progress is tracked through to completion and recorded in ALTUM. Digital copies are retained in the system, along with manufacturer's recommendations, technical data, and OSHA procedures specific to the task, for documentation.

The ASM Global corporate office provides a monthly 'dashboard' report to executive level operations personnel to ensure accountability and performance. The implementation of Altum, the operation of the facility equipment and plant systems will continue to be maintained at the highest standards.



INTRODUCING INFOR

The Infor Sales & Event Management Solution is our global solution for lead, sales, food & beverage, and event management for all ASM Global venues. Integrated within our eco-system, the solution is designed to help the Complex efficiently operate and book events through our network of contacts, clients, and promoters.

THE BENEFITS OF THE PROGRAM

Designed around the lifecycle stages of an event, this unique, process-driven lifecycle technology is customizable and designed to automatically prompt tasks to streamline processes, while eliminating the opportunity for missed details and mistakes.

This unique cloud-based sales and event management software automates the entire event booking process, from initial inquiry to the final invoice. This is achieved through native capabilities and strong integration with Microsoft Dynamics 365, our financial solution.

Infor understands the need to integrate the sales and event management software into Microsoft Dynamics 365 Finance and ABI Mastermind Time and Attendance.

CONNECTING GLOBALLY

This is a system that we are rolling out worldwide, which will allow us to compare the Complex's event sales performance with other venues within our network. This comparison allows us to give insights into a range of important measures that enable us to continually improve the services we offer and see where we stand on key performance criteria against all other arenas and event centers around the world.

This lets us allocate the correct budget and assess the level of satisfaction of the Complex's guests against all other venues around the world.

INFOR SALES & EVENT MANAGEMENT

This system is designed to help organizations get up to speed quickly with features that support an intuitive process. Benefits include:

- **LABOR SCHEDULING MADE EASY**
- **OPTIMIZING SPACE USAGE**
- **IMPROVING PROFIT CONVERSION**
- **FINANCIAL AND HISTORICAL REPORTING**
- **DASHBOARD REPORTING**
- **CUSTOMER RELATIONSHIP MANAGEMENT**
- **DASHBOARD REPORTING**
- **MARKETING ANALYSIS**

BEST-IN-CLASS SOFTWARE



ASM Global has partnered with ABI to standardize workforce management in all venues by utilizing the ABI MasterMind® (“ABIMM”) system. ABIMM will seamlessly interface with Workday, ASM Global’s new HCM & Talent system, to offer a cutting-edge solution to all workforce management needs. ABIMM is the world’s premier workforce management system laser focused on the specific requirements of public assembly entities with seasonal and variable staffing and operational needs.

ABIMM Workforce Manager’s (WFM) key focus is to automate complex manual tasks that save time and money while eliminating human error. Combining the following elements will streamline the entire scheduling process for:

- Staff availability
- Scheduling
- Training & licensure tracking

ABIMM will save countless hours and maintain all labor compliance requirements.

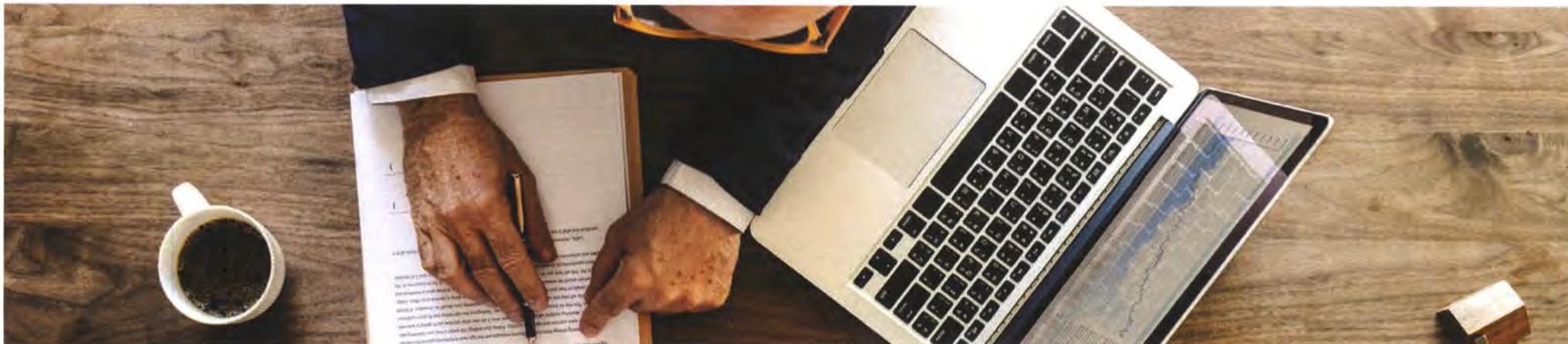
Easily configurable and reusable event and non-event schedule templates are used for labor cost estimation, while the actual filled schedule drives staff and manager communication, as well as Time & Attendance (T&A) validation for scheduled staff. The T&A process provides secure checks and balances to employee and non-employee’s alike with credentialing, access control, biometric verification (optional), and auditing of third-party individuals.



ASM Global Corporate is transitioning from ADP to Workday HCM & Talent (Workday) solution for improved human resources management and payroll systems and will continue using ABIMM for timekeeping. With corporate information technology and payroll support, we will work on completely integrating the Workday system with our accounting software for event allocations, projects, and capital improvements.

Workday HCM & Talent solution is currently live in all North American ASM Global venues, and the Workday payroll solution will be available in North America later this year. Workday will replace the current EVS system, ADP Solutions, at all ASM Global venues. As the platform for people management, Workday integrates various components to drive value for ASM venues including other programs such as ASM Global Academy, Fidelity 401K, and Trion benefits system.

Workday will drive value by strengthening talent management, streamlining recruiting, and standardizing employee experience across the lifecycle. Workday will also create a more efficient workforce through its automation capabilities, which will significantly reduce the need for manual employee intervention and administrative work creating a more productive work force.



Microsoft Dynamics 365

ASM Global will embark on an Enterprise Resource Planning (ERP) implementation across our venues in the next 6 – 12 months. ERP will be a Microsoft Dynamics365 (D365) cloud-based system and will be supplemented by the deFacto Planning (deFacto) tool.

A consistent global ERP system will allow ASM Global and all its venues to have a sustainable platform to establish standards for:

- Working & controls
- Build insights through analytics
- Improved information flow between operations & financial results

A global ERP system will enable ASM Global and its venues to leverage the power of Business Intelligence with industry specific metrics and reporting for improved performance management.

Through two modern financial system tools, D365 and deFacto, each configured for our business, ASM Global offers tactical finance ability that allows finance teams strategic focus for the future. The offering included a multidimensional ERP solution based in the D365 Finance & Operations suite, which is uniquely configured to support ASM Global's standard financial processes and controls across a suite of:

- General ledger
- Accounts payable
- Accounts receivable
- Event accounting modules

THESE ENHANCEMENTS DELIVER:

- **Improved automation providing quality data fast**
- **Consistency in financial information, allowing for benchmarking against other ASM Global venue metrics**
- **Standardized control environment, ensuring segregation of duties & system security**
- **Advanced analytics – guiding the local team toward a strategic focus on for future planning**

Based in the Microsoft Cloud, this solution is designed to enhance workflow for transaction processing, master data management, and cost accounting to deliver superior insights between venue operations and financial results.

The ERP solution is supplemented by deFacto, allowing venue finance teams the freedom and the space to investigate and explore financial data. The deFacto tool uses ASM Global's system-driven financial data architecture to support a waterfall of strategic financial reporting, analysis, and forecasting tools.

ASM Global's instance of deFacto not only offers traditional reporting output designed to validate and reconcile financial data, but also offers advanced analytics and drill-down features to strengthen strategic review and the sophisticated communication of financial results.

These two financial system tools are backed by central systems administrations, master data management, and report design services provided by ASM Global's senior finance teams.

CUSTOMER SERVICE & TRAINING

Delivering consistent and positive guest experiences is our central focus of the ASM Global Customer Service program, which includes:

- Proper skills training
- Active supervision
- Accountability for all who interact with our guests
- Surveying guests for feedback & process improvements

All Complex team members play a role in positive guest experiences whether they are full-time or part-time. Our customer service program starts with the successful recruiting of personnel who will carry out the mission statement and deliver a positive memorable experience for all who use the Complex. All personnel who represent ASM Global will be asked to share a common goal of providing a consistent level of service that exceeds expectations and enhances the customer experience.

ASM Global has developed ASM Global Academy, a multi-lingual computer-based training library that has over 1,800 modules inclusive of customer service training, conflict resolutions, communication, and problem-solving skills.

ASM Global has developed the **Experience Customer Service** training program to provide all ASM Global employees with the following:

- Know What is Expected
- Greater Confidence
- Transferable Skills
- Job Satisfaction
- Pride in Being Part of a World-Class Team

Customer service is everyone's responsibility and all ASM Global employees must:

- Consistently exceed guest expectations
- Deliver amazing service experiences
- Reinforce ASM Global's culture
- Turn moments of truth into positive memories that inspire guests to return



TRAINING

ASM Global has launched the first multilingual globalized training program in the industry – ASM Global Academy. The Academy is available to all its 50,000 global workforce and aims to elevate upskilled team members and the guest experience.

ASM Global Academy Utilizes:

- Gamification
- Badges
- Leaderboards
- Quizzes & Evaluations

There are more than 1,800 multi-language courses available within the Academy, providing team members an opportunity to complete self-paced learning courses, which support their career development and enhance their knowledge when it comes to creating the ultimate guest experience.

Many of the courses are specifically customized to ASM Global, and created in-house by ASM Global's learning and development department. Training courses will encompass, but not be limited to, guest services, diversity, equity and inclusion, food safety, inclusive culture, sustainability, operations, safety and security, and leadership.



Training modules for the Cabarrus Arena & Events Center include:

First day of employment, for all employees:

- New Employee Orientation
- General Security & Safety

Training for all employees in their first 30 days:

- Customer Service Training - customized to the Complex

Company-wide mandatory training for all salaried employees:

- Cyber Security
- Sexual Harassment Prevention
- Diversity & Inclusion
- Workplace Security

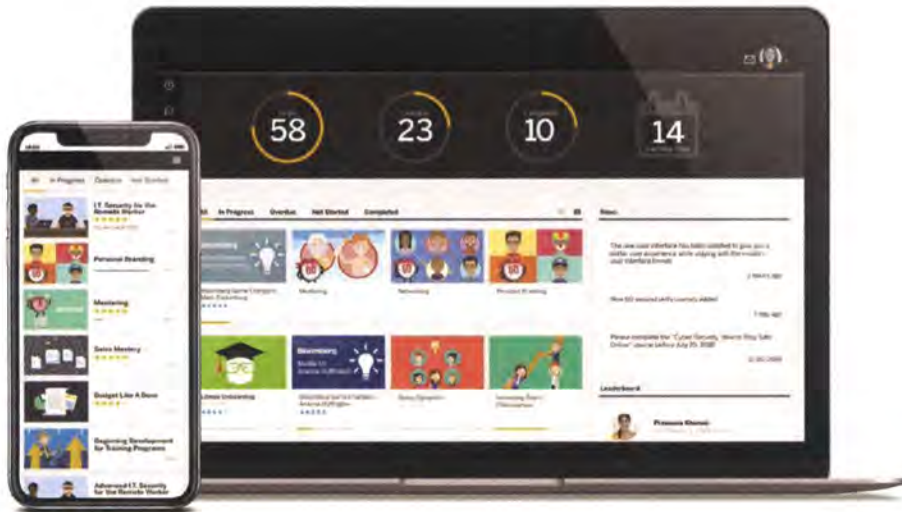
Specific training for managers and supervisors, within their first 90 days:

- Leadership Training – People and Training
- Leadership Training – Mentoring and Rewarding Employees
- Interview Training
- Manager on Duty Training

Training for managers, new or promoted, on their first day:

- New Manager Training

Each month we host staff meetings for all staff to refresh employee skills and introduce new processes, policies, and procedures. We also use this time to recognize employees who go above and beyond and provide exemplary service. All employees attend these meeting where service excellence, health, safety, and security updates are always on the agenda.



As part of our continuous process improvement, ASM Global has partnered with Qualtrics to develop ASM Global Insights, a real-time customer feedback tool which over time will replace the existing survey systems currently in place.



This global CX initiative will help us gain a deeper understanding into our customers' - guests, clients & partners - event experiences, how they view our venues and interactions with team members.

No other organization offers the benefits of global scale and best-in-class local operational execution to create value and drive profits.

Organic Growth

Consistent guest experiences at the venue, create repeat business, and drive organic growth.

Benchmarking

With a global footprint and thousands of events being executed, only ASM Global Insights® provides the ability to evaluate performance across various metrics, venue types, and disciplines.

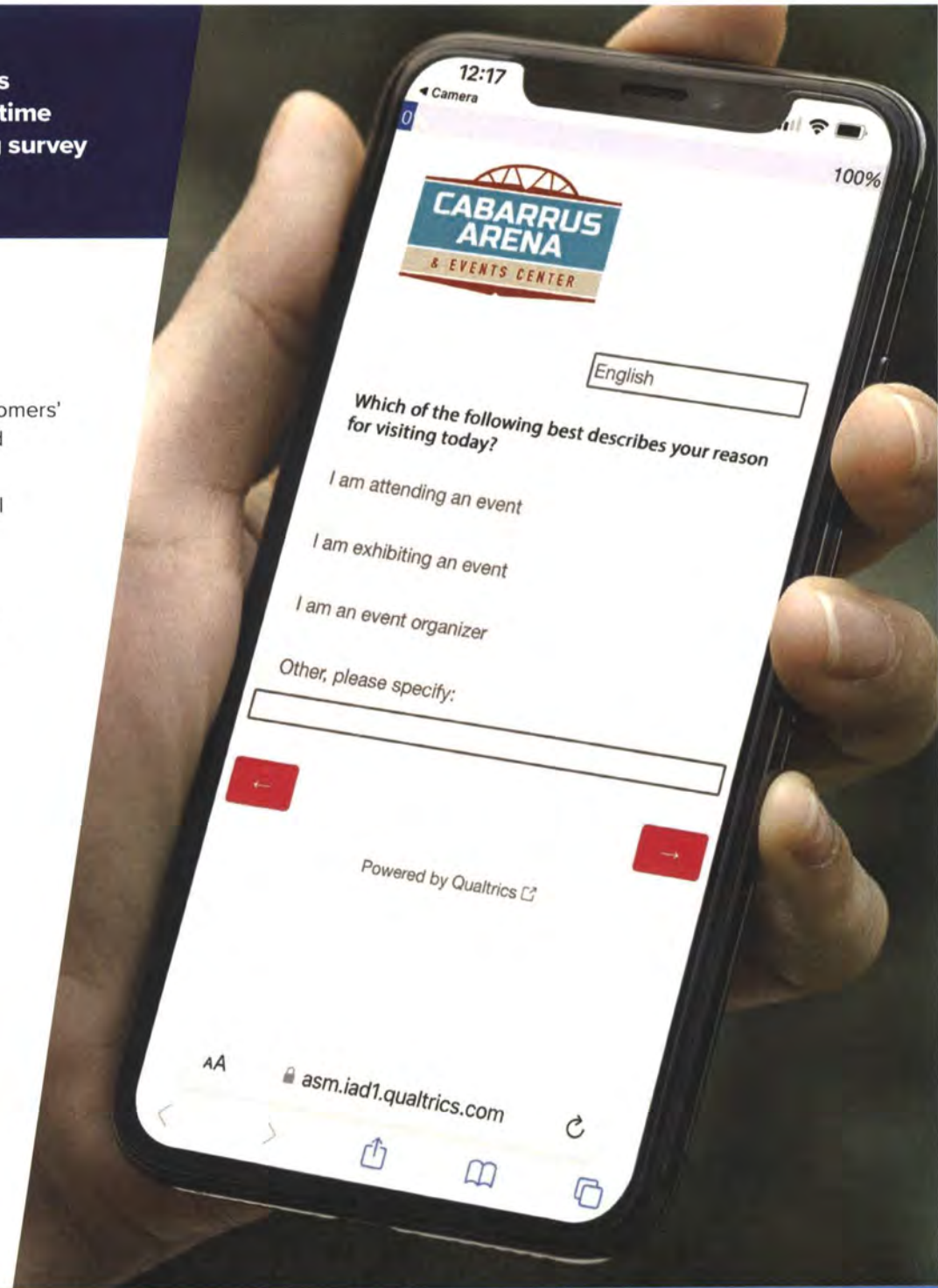
In the Moment Feedback

Leveraging QR codes to engage with guests during their event experience, capturing real time immediate feedback, and accelerating the urgency in addressing any concerns.

Hot Alert Ticketing

There is a closed loop follow-up process that engages staff to resolve open issues. As an integral part of a best-in-class customer experience (CX), we have incorporated this integrated feature across our active venues. Benefits include:

- Real-time visibility into guest concerns
- Improved customer perceptions
- Ownership & accountability for the customer experience



SAVOR...

A HOSPITALITY-FOCUSED CULINARY SOLUTION

SAVOR...THE CHOICE OF CITIES AND COUNTIES WORLDWIDE

SAVOR has built its reputation in Cabarrus County by creating amazing experiences for clients and guests at the Cabarrus Arena & Events Center.

Our clients and guests have embraced SAVOR's "in-house" localized hospitality model, breaking away from traditional third-party food contractor models. SAVOR creates points of differentiation throughout the Complex, beginning with a Local First Culture and operating model.

SAVOR's Local First operating model of delivering first-class restaurant quality food and service has changed business as usual within the industry.

LOCAL IS ACCOUNTABLE
LOCAL IS FRESH
LOCAL DIFFERENTIATES



APPROACH TO FOOD SERVICE

VALUE ADDED FROM COMBINED MANAGEMENT & CULINARY TEAM

ASM Global proposes a continuation of the in-house operating model for the Cabarrus Arena & Events Center. As SAVOR is a division of ASM Global, the County will realize the benefits of one centralized team and operating model.

As successfully demonstrated over 18 years, this structure has and will continue to provide significant cost savings and operational efficiencies and create a seamless experience for users and guests of the Complex.

Our program meets and exceeds customer expectations and “speaks to” and delivers for attendees, today and into the future. Our goal is to continue serving an unparalleled culinary experience that wows guests and enhances the Complex’s overall reputation.

CREATIVE SALES & MARKETING

The innovative and targeted SAVOR “Action Plan” moving forward will include:

- A well-balanced mix of proprietary, regional & national brands that will elevate the offerings, offer consistency, and gain the customers trust
- A fresh, creative & cutting-edge retail approach including new locations, exciting signage, and streamlined, contactless options for fans and guests.
- A commitment to working in collaboration with the ASM Global management team to market the Complex & premium spaces for private events and drive incremental revenue

OBJECTIVE

To create unique and aligned food experiences that build the reputation of the show, event and destination.

KEY DELIVERABLES

1
FOOD & SERVICE
EXCELLENCE

3
CUSTOMER DATA
& INSIGHT

5
FINANCIAL
CONTROLS,
BUDGETS & AUDITS

7
OPERATIONAL
ANALYSIS &
REPORTING

2
LOCAL &
REGIONAL FOOD
SOURCING

4
SUSTAINABLE
& ETHICAL
APPROACH

6
FOOD SAFETY
& SECURITY

8
EFFECTIVE
TRAINING &
DEVELOPMENT

LOCAL & REGIONAL FOOD SOURCING

As a core philosophy, we are focused on integrating with the community that surrounds us. This conviction is reflected in our commitment to:

- Purchasing locally when the suppliers meet our standards
- Hiring staff from underserved communities
- Providing local job readiness training & development programs
- Integrating small local restaurant owners into operations



FOOD & SERVICE EXCELLENCE

All SAVOR team members strive to create a “WOW” factor for our guests, providing superior service and the highest quality product focusing on presentation, flexibility, fresh authentic local flavors and creative food concepts. Incorporating and capitalizing on innovative and ever-evolving technologies is foundational to our approach.

SUSTAINABLE & ETHICAL APPROACH

Our ASM Global Acts program is a universal strategy that is applied locally in Cabarrus County. The pillars of our program include Strengthen our Communities, Invest in People, and Protect the Environment. Due to the great work that has already been done at the Complex, we are able to demonstrate specific achievements to date as well as show how we can build on this platform to project future goals and ambitions for the Complex.

CUSTOMER DATA & INSIGHTS

Our programs and initiatives are all executed with a focus on our customer needs. Currently being introduced at ASM Global/SAVOR operations across the country, ASM Global Insights is our platform that aggregates and captures both event organizer and guest feedback. It features live analytics as well as a live dashboard providing real-time data and pre, during and post show analysis. With an ASM Global/SAVOR global footprint and thousands of events being executed, ASM Global Insights will provide the ability to evaluate Complex performance across various metrics, venue types, and disciplines.



FINANCIAL CONTROLS, BUDGETS & AUDITS

Our financial systems are flexible to accommodate changing conditions while always maintaining a focus on revenue and net operating results. Our strong controls, measurable benchmarks, relevant analysis, and crystal-clear reporting are essential tools for success. The local management uses this information to make informed decisions that drive efficiencies and provide value for the County.

OPERATIONAL ANALYSIS & REPORTING

Our monthly financial package submitted to the County includes event analysis, a balance sheet, lead income statement, actual vs budget, subcontractor financials, fiscal year forecast, and other reporting requirements. Additional ongoing reporting and analysis includes food safety, workspace status, purchasing, and sustainability.

FOOD SAFETY & SECURITY

Food safety is a critical part of our operations. Working with recognized experts, SAVOR has developed a Food Safety and HACCP Plan that is compliant with FDA Food Code and FDA 21 CFR Part 11. Prerequisite Food Safety Programs are all monitored and audited, including Cleaning, Sanitation, and Hygiene methods across all areas of food preparation.

EFFECTIVE RECRUITMENT & TRAINING

We know that people make the difference. Whether its front or back of house, our recruitment and selection processes are key to our customer service success. Once employees are selected and hired, each team member's skills and experience are assessed and enhanced through our proprietary ASM Global Academy training programs. In addition, each SAVOR location is connected with a Culinary Collective of highly skilled culinarians for additional training in food merchandising, presentation, flavor profiling, as well as allergen training, and food safety.

PURCHASING PROGRAM

The Purchasing Program is geared towards sourcing food, beverage, and hospitality supply from reputable and competitively priced suppliers. It reflects our Procurement and Supplier Diversity strategy with a combination of locally selected suppliers and national SAVOR programs. Our national programs include distributors/service providers with the backing of 250+ relations/agreements with food and supply manufacturers.

SAVOR uses Proactis, which is leveraged throughout all ASM Global and SAVOR venues to drive efficiencies and cost savings across purchasing efforts. Integrated with our corporate central spend analysis, we are able to drive better pricing for the County through analysis of company-wide spend and our relationships with our vendors and partners.



TRANSITION PLAN

NO TRANSITION TIME NEEDED

As the incumbent, ASM Global has no need for a transition plan, there is no learning curve to get to know the intricacies of the Complex venues and build relationships with existing clients. The management and marketing of the Complex will continue seamlessly with no risk of:

- Lost business
- Lost revenues
- Lost clients

With no transition needed, ASM Global is prepared to start implementing initiatives, with approval of the County, immediately.



THE FUTURE IS NOW: BOLD NEW MANAGEMENT INITIATIVES FOR THE CABARRUS ARENA & EVENTS CENTER

Moving forward, our management initiatives for the Complex are driven, in part, by our assessment of its strengths, assets, and potential challenge summarized below.



STRENGTHS

- Strong relationships with local event organizers & stakeholders
- High revenue-producing events already booked at 80% for the next 18 months
- Event return rate about 70%
- Excellent F&B quality, service & operations compared to competitive set in the region
- Exceptional full-time staff
- Flexible infrastructure to accommodate all types of events including:
 - Social & Private
 - Live Entertainment
 - Consumer Trade Shows
 - Outdoor Events
 - Sporting, Dance & Cheer



ASSETS

- Extensive equipment inventory to handle multiple event types
- NBA basketball court & associated equipment
- 10-acre fairground midway
- Room for 125+ RVs with water, sewer & power connections
- 2,500 parking spaces on-site
- \$100,000 marketing fund in place – funded 50/50 by the County & ASM Global



ANTICIPATED CHALLENGES

- Event calendar for high-revenue spaces stays full 18+ months out
- Only essential equipment repair, upgrades & replacement are feasible under current budget
- Additional staffing necessary for new event creation & implementation
- Funding to implement tools necessary to maximize revenues through business growth initiatives



MANAGEMENT INITIATIVES MOVING FORWARD

DIGITAL SCREEN NETWORK

There is a great opportunity to refresh the communication methods throughout the Complex.

Through the provision of digital assets, we can create a canvas to deliver additional value and revenues for event organizers and sponsors, as well as improved experiences for visitor and guests. This will also create a new revenue stream for the County.



The ASM Global Media Network incorporates longstanding partners, ASM Global and Anthony James Partners (AJP), experienced and industry-leading companies that bring in-depth understanding of the Digital Out of Home Media marketplace, along with established local and regional relationships.

The ASM Global Media Network is strategically aligned on five continents with AEG Global Partnerships, a global leader in:

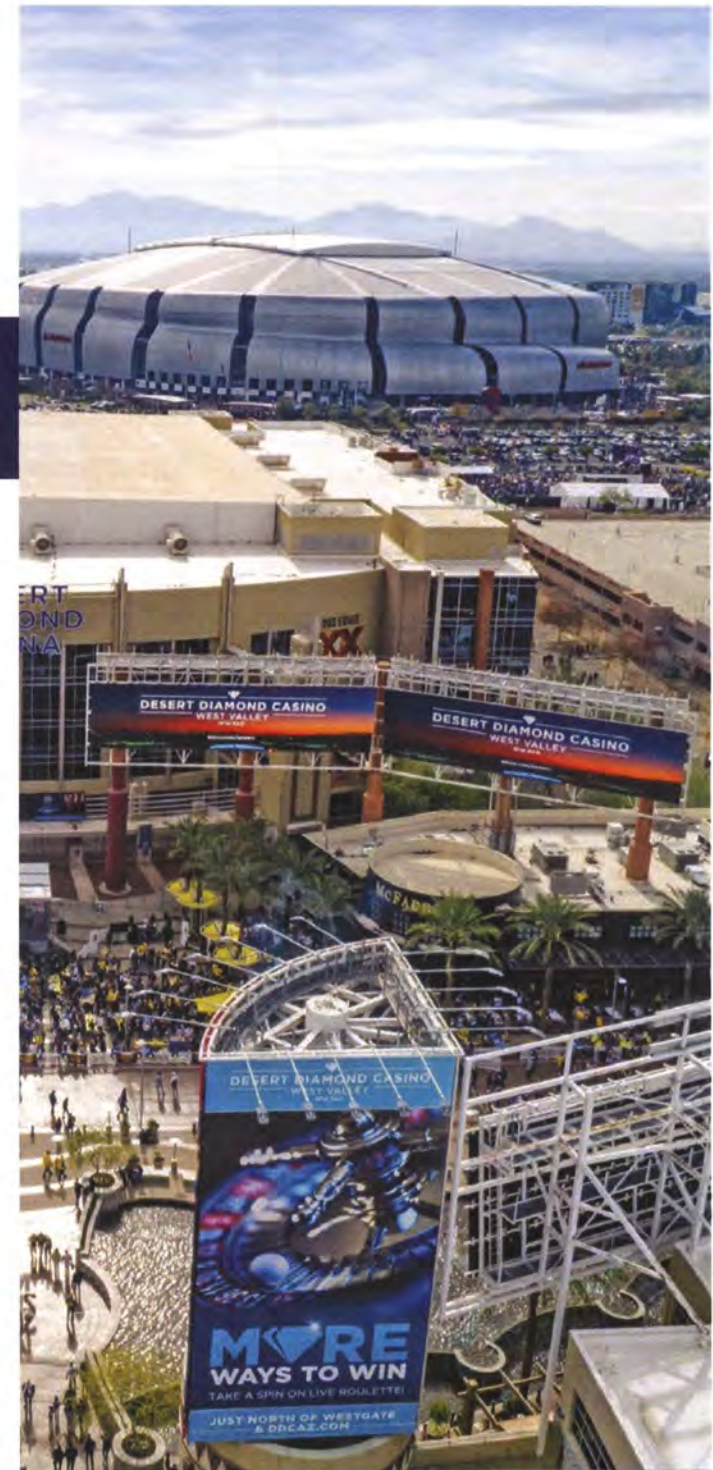
- Marketing
- Selling & securing sponsorships and naming rights for municipal clients and partners

Our proposal will offer a single, end-to-end solution through best-in-class design, procurement, installation, maintenance, content management, sales, marketing, and servicing. Together, we will provide a customized asset plan that offers a complete and impactful system for advertising, entertainment, and real-time communication.

As an exciting vehicle for creative content, the digital media program will be highly attractive to potential advertising and sponsorship partners. Operationally, the systems will be thoughtfully designed to provide simplified content controls and ease of management. The physical assets themselves will be integrated in such a way as to provide easy access for service and maintenance requirements.

We are confident that our knowledge of the property coupled with our technologically and creatively charged marketing and sponsorship outreach will create unparalleled efficiencies, collaboration, and innovation to support sales and revenue.

Acting on our combined adaptability, resourcefulness, creativity, and growth investments, the inclusion of the Cabarrus Arena & Events Center into the ASM Global Media Network will reinforce the venue as a dynamic location within our portfolio.





DIGITAL OUT OF HOME OPPORTUNITY

CREATING NEW REVENUE OPPORTUNITIES FOR THE COMPLEX & THE COUNTY

We harnessed the power of our worldwide scale to launch a new Digital Out of Home Media Network that is uniquely positioned to offer advertising opportunities to brands across our venue portfolio.

What is a Digital Media Network? With digital displays ranging from outdoor marquees to interior LED screens, ASM Global has a significant amount of sellable inventory that can be made available to advertisers.

How does it work? ASM Global works with local venues to identify unsold digital signage inventory and after aggregating the inventory with other venues in the network, sells time on the screens to advertisers in non-conflicting categories.

What are the opportunities? We provide national brands with signage opportunities in multiple markets with a rev-share to the local venues based on their level of their participation.

Who sells the inventory? The ASM Global Media Network sales team is responsible for selling. Team members have significant experience in positioning each unique opportunity as a 'must-buy' to the world's largest brands such as, PepsiCo, Frito-Lay, MasterCard and Universal Pictures.

FOOD & BEVERAGE INITIATIVES

SAVOR currently delivers some of the best quality food, beverage, and service in the region. To elevate the food & beverage offerings we currently have at our concession stands, ASM Global is proposing to invest in enhancing the existing concession stands with enhanced facades and updated menus that reflect the best in local food products for attendees AND new portable equipment that will allow our SAVOR team to better meet guest demand for retail food & beverage locations throughout the Complex. To enhance our food & beverage offerings for private, social, and corporate events, we have upgraded our current catering menu to better reflect the quality and selection available for our guests. Please refer to the Appendix for a copy of the upgraded catering menu.





CONCESSIONS BRANDING & INNOVATION

CREATING A FOOD BRAND

To meet and exceed customer expectations for innovative food concepts, we are proposing to re-invent our concession stand with new concepts and branding. The innovative new concepts we would implement, with approval of the County, include:

- **Smokey Fire BBQ** – Featuring spicy, sweet & tangy barbeque pork, chicken, and brisket
- **Speedy Burgers** – Juicy beef, turkey, and plant-based burgers with custom toppings & sauces
- **Chicken Loop** – Fresh-fried chicken tenders, nuggets & sandwiches
- **Peeler – Cheese Fries** – Crispy fries serviced with a rich cheese sauce & variety of toppings, for a meal or just a snack

On the following pages we have provided renderings of what these new concepts could look like at the Complex.





THE BEST ARENA BBQ IN CABARRUS COUNTY.

**SMOKY
FIRE
BBQ**



**SMOKY
FIRE
BBQ**

**SMOKY
FIRE
BBQ**

**SWEET
TANGY
OR SPICY,
IT'S UP
TO YOU!**

**SWEET
TANGY
OR SPICY
IT'S UP
TO YOU!**

**DELICIOUS BRISKET
PULLED PORK & CHICKEN**









CREATING NEW POINTS OF SERVICE

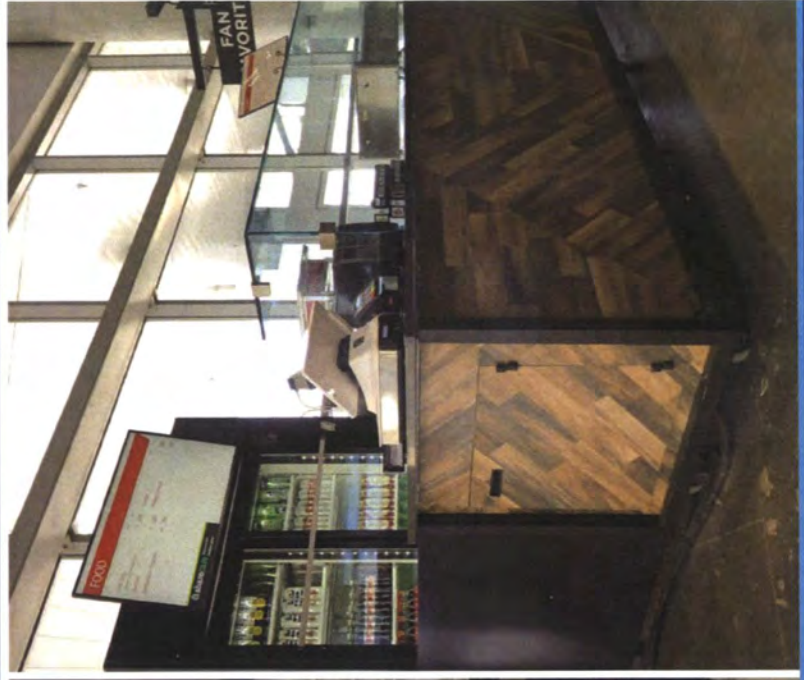
To drive additional revenue streams, ASM Global is proposing investment into portable concessions carts to:

- Create new points of service
- Extend point of sale opportunities for newly created concessions concepts
- Offer "pop-up" concepts featuring local foods & flavors from regional restaurateurs
- Enhance speed-of-service for large events
- Improve the customer experience
- Provide a designated pick-up area for mobile ordering

The portable carts will allow ASM Global to improve speed-of-service for all ticketed, seated events by utilizing them as designated pick-up areas for guests that want to use mobile ordering to place and pay for their orders.

The carts can also be used to increase opportunities for local chefs and restaurants to showcase their foods providing economic opportunity for local businesses and entrepreneurs.

Recognizing an emerging trend, we will introduce the use of mobile ordering technology. This improves customer service, as guests order when they want and are notified when the food is ready, and then are directed to a convenient pick-up spot within the venue to grab their order and return to their seats. They avoid the lines and can enjoy more of the event!



POSITIONING CABARRUS ARENA & EVENTS CENTER AS A COMMUNITY ASSET

The overriding goal of maximizing economic impact should be balanced with the need to offer access to not-for-profit organizations working to enhance the community. Our proposed strategy to achieve this is implementing a rate structure that encourages access by those organizations when there is no conflict with the primary goal of being an economic engine for the community.

A separate initiative with direct and immediate impact on the community is actively recruiting and employing disadvantaged individuals and organizations working to better the community in various roles that support the Complex and event activities.

This initiative will allow the Complex to:

1. Offer rates that allow not-for-profit organizations to use the facilities of the Complex to help achieve their missions, while not interfering with ASM Global's ability to maximize revenue for the County
2. Increase the number of staff with various disabilities we currently employ, providing more job opportunities for the local community
3. Reignite our fundraising program that allows not-for-profit groups to use the Complex facilities to support their fundraising needs



ENHANCE YOUTH SPORT TOURISM

The Complex has been successful in hosting youth sport competitions, and with the rise of multiple competitive youth sport programs, ASM Global proposes investment into a bleacher system to enhance the marketability of the Complex when competing to host new youth sport tournaments.

The bleacher system will increase the ability for additional tournaments and other events that require seating to watch competitions. Working in conjunction with Explore Cabarrus, ASM Global can target new competitive youth sport events that bring families to the region, improving the economic impact for the County through:

- Increased hotel room nights sold
- New revenue streams for local businesses & restaurants in the region
- Greater sales & hotel tax revenues



CABARRUS COUNTY ARENA & EVENTS CENTER ASM GLOBAL ORGANIZATIONAL CHART



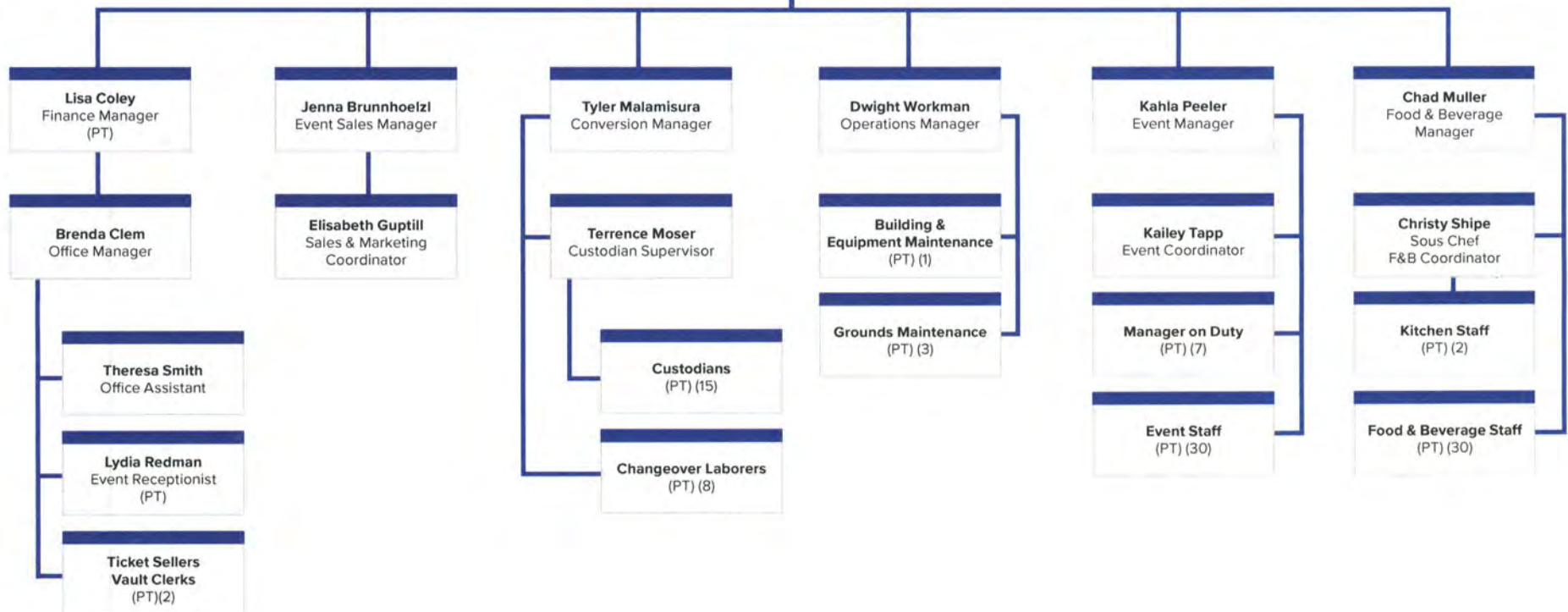
OPERATIONS SUPPORT

Tony Cima, Senior Vice President,
Arenas, Stadium & Theaters
Les Crooks, Regional Vice President,
Arenas, Stadiums & Theaters

Kenny Robinson
General Manager

FOOD & BEVERAGE SUPPORT

Shaun Beard,
Senior Vice President, SAVOR
Andrew VanDeweghe,
Regional Director, SAVOR



ASM GLOBAL LOCAL LEADERSHIP



KENNETH ROBINSON

General Manager | Cabarrus Arena & Events Center

ADVISORY

Kenny is a Cabarrus County native with 20+ years of hospitality and live event experience. He leads a team of managers to provide the best experience for guests, event organizers, and everyone working behind the scenes producing events while concentrating on meeting client needs. His local roots and calling to be an active community leader has been instrumental in growing Cabarrus Arena & Events Center's business while maximizing the facility's contribution to the community.

Kenny has served in leadership roles including finance, human resources, event management, infrastructure management, safety and security planning, and as general manager. He has managed over 3,000 events at Cabarrus Arena & Events Center since it opened.

Through Kenny's leadership, Cabarrus Arena & Events Center has enjoyed 98% event organizer satisfaction, excellent event return rates, consistent revenue growth, and client satisfaction ratings of over 95%. With a focus on asset-based management, he has spearheaded the venue's capital improvement projects including:

- Construction of a 10,000 square foot storage facility
- Venue interior & exterior lighting improvements
- Interior & exterior LED message board installation and improvements
- WiFi installation & improvements
- Foodservice equipment improvements
- Acquisition of equipment to produce new profit centers for event operations
- Construction projects of various scales & complexity



LISA COLEY

Finance Manager | Cabarrus Arena & Events Center

Lisa is a Cabarrus County resident with 18 years in hospitality finance and administration. While her primary work has been in finance, human resources, and payroll, Lisa is far from being a stereotypical Finance Manager. She is deeply involved in event and venue operations and works closely with the General Manager to support staff and client needs while producing trusted financial information used to guide business decisions.

As an active resident, Lisa stays abreast of local interests that Cabarrus Arena & Events Center can incorporate into its operations. Her hands-on approach, leadership, and support has been invaluable as the organization has become grown and become more complex.

ASM GLOBAL CORPORATE LEADERSHIP



TONY CIMA

Senior Vice President | Arenas, Stadium & Theaters

ADVISORY

Tony has over 25 years of experience in the hospitality industry. He is a leading expert in event development, management, facility operations, AV Technology, ticketing operations, finance, food & beverage, and market research. At ASM Global, he develops strategies and action plans to address current opportunities and convert best practices into practical tools that drive revenue.



LES CROOKS

Regional Vice President | Arenas, Stadiums & Theaters

ADVISORY

Les has over 30 years' experience in hospitality and venue management. He has worked through progressively challenging positions at ASM Global since 1999 specializing in both long-term and short-term contracts. Les supports our on-site managers through account openings and transitions, and on-going management.



SHAUN BEARD

Senior Vice President | Food & Beverage

ADVISORY

Shaun leads SAVOR, the company's Food & Beverage Division, which provides customized, local food and beverage services to over 200 venues worldwide. Over the past 14 years, he has grown food and beverage revenues by sixfold and positioned SAVOR as a leader in sustainable, farm-to-table food and local chef and farm partnerships. As the current Vice Chairman of the National Restaurant Association's Education Committee, he works to support youth food and wellness education at the national level.



ANDREW VANDEWEGHE

Regional Director | Food & Beverage

ADVISORY

Andrew oversees all concessions, catering, and premium food & beverage services for Arena's, Stadiums, and Theaters throughout North America. He has extensive experience with food & beverage quality control, customer service, financial management, and capital planning initiatives. Andrew is involved with developing forward-thinking initiatives that incorporate industry trends, advanced technology, and local purchasing initiatives.

ASM GLOBAL EXECUTIVE LEADERSHIP



RON BENSON

President & Chief Executive Officer

ADVISORY

Ron has a 40+ year legacy of creating unparalleled value for hospitality, entertainment and recreational venues and brands across the globe. Since joining ASM Global in March 2021, he has elevated growth and revenues across our worldwide footprint.

Prior to his current role, Ron was the President of Venue Nation, a division of Live Nation Entertainment, where he oversaw the operation of 120 clubs, theaters, and amphitheaters around the U.S., creating the largest portfolio of music venues in the world. Before that, he was President of Live Nation's 85+ clubs and theaters, and CEO of TicketsNow where he restructured the resale site's operations and business initiatives.



MARK ROZELLS

Chief Financial Officer

ADVISORY

Mark is a 25+ year hospitality and entertainment executive with extensive experience in corporate finance and operations. At ASM Global, he oversees the company's global finance organization, including all financial planning and analysis, accounting, tax and internal audit, legal and information technology.



JOHN BOYLE

Chief Content Officer

ADVISORY

John is a 30-year sports and entertainment industry executive. Throughout his career, he has focused on content production and promotion, with an emphasis on concerts and music festivals, action sports events, consumer facing pop culture exhibitions, private corporate events, and IP acquisitions.



SHAUNA ELVIN

Chief Human Resources Officer

ADVISORY

With nearly 35 years of experience in human resources and over 25 years in hospitality, Shauna works closely with each ASM Global venue to ensure effective human resources practices are in place. She ensures venue teams and staff feel empowered to contribute to exceptional workplace experience throughout their tenure with the organization.



DAN HOFFEND

Executive Vice President | Convention Centers

ADVISORY

Dan has spent his entire career in the exposition and convention center business. He has over 30 years of experience, starting with the expansion of his family business, Hoffend Xposition, for which he grew revenues from \$6M to \$45M.

At ASM Global, he leads convention center growth and innovation, serves as an industry spokesperson, and designs and implements long-term business strategies for existing clients.



JASON OBERLANDER

Chief Commercial Officer

ADVISORY

Jason has over 25 years of experience in driving revenue through marketing partnerships, sponsorships, media, and advertising. At ASM Global, he is responsible for the sponsorship program, with a proven track record of leading sales, business development, and marketing teams at media and sports properties including Viacom, CBS, National Basketball Association, IMG, and Learfield.



ALEX MERCHÁN

Chief Marketing Officer

ADVISORY

A 25-year global hospitality, marketing and public relations veteran, Alex is responsible for creating and implementing result-driven marketing programs and systemwide best practices to elevate revenue growth across the ASM Global portfolio.

Alex has extensive experience in developing powerful and engaging brand campaigns, best-in-class marketing organizations and traffic-driving initiatives in support of business objectives.



GARY JACOBUS

President | Business Development

ADVISORY

Gary has decades of experience in developing comprehensive business partnerships with blue chip brands and properties worldwide. He created some of the most powerful and enduring partnerships in sports and entertainment during his tenure with the NFL, NBA, IMG, and the U.S. Tennis Association where he generated over \$500 million in partnership revenue.

EXAMPLES OF MANAGEMENT & FINANCIAL REPORTS

Our local ASM Global management team currently provides the County with monthly updates and financial reports. In cooperation with the County, we are happy to customize and provide more detailed monthly operating reports and an annual report. You will find samples of both types of reports that we have developed for other clients in the Appendix.



ANTICIPATED RESULTS

With the County's mission and goals for the Complex providing the foundation of our annual operating and marketing plans, ASM Global's responsibility is to effectively manage, maximize, and diversify the event mix to meet and exceed the expectations and desires of the County, stakeholders, and guests. For the Complex, this includes the establishment of an annual event calendar that effectively balances the financial operating results for the Complex with the broader economic benefit to the community and region.

The annual event mix we have grown and established at the Cabarrus County Arena & Events Center achieves this successful mix for the benefit of all. Direct spending in the County includes, but is not limited to:

- Area hotel stays
- Gasoline purchases
- Local meal expenditures
- Retail purchases

ASM Global purchases products and services from local vendors and suppliers to support the hosting and servicing of our events, clients, and event attendees. In short, the total direct economic impact of the Complex consists of the direct operational expenditures made by ASM Global itself and the direct expenditures made by users, exhibitors, and guests. There is the "indirect" economic rippling effect that occurs as direct expenditures are re-spent throughout the local economy.

Some of the events currently hosted or are scheduled in the future that have or will have a significant economic impact for the County, local hotels and businesses include:

- Speedway Classic Summer Circuit Dog Show
- Newbreed Grappling
- Tom Mack Collector Car Auction
- Train Strongman Competition
- Loomis Brothers Circus
- Repticon
- NCNA Coin Convention
- International Brazilian Jiu Jitsu Competition
- Christmas Made in the South
- All-Star Premier Cheerleading
- Gary Allan Concert
- Rise Productions Cheerleading
- Cheersport Cheerleading
- Speedway Classic Fall Circuit Dog Show
- Peak Building Materials Auction
- American Cornhole Organization
- NC DOT Aggregate Sampling and Testing (10 3-day classes each year)
- 9Panel Cheerfest
- Universal Spirit Cheerleading
- Varsity Spirit NCA Cheerleading Classic
- USA Wrestling
- Monster Truck Wars
- The Greater Charlotte Home & Landscape Show
- Charlotte Racer's Expo
- One Up Championship Cheerleading
- Carolina Alpaca Celebration
- Deep South Spirit Cheerleading Tour
- Lucky Charm Invitational Gymnastics
- Spirit Solutions Cheerleading
- Encore Championship Cheerleading
- Mecklenburg Amateur Radio Society's Hamfest
- NC AAU Wrestling
- Klean Exhibition Car Show
- Endless Talent Dance Competition
- Speedway Classic Spring Circuit Dog Show
- Showstopper Dance Competition
- All Out Cheerleading Championships
- Starpower Dance Competition
- Gordon Food Service Trade Show
- BodyArmor State Games
- Spartan DEKA Fit Competition
- Victory Lane Dog Show
- USA Badminton
- Slammedenuff Car Show

ASM Global will continue to work with Explore Cabarrus and other destination partners to grow and maximize the events that are central to supporting the local economy and providing opportunities for local businesses and entrepreneurs.





FINANCIAL PLAN

MINIMIZING EXPENSES & MAXIMIZING REVENUES

ASM Global's long, successful track record of achieving the financial goals of our clients is unmatched. Our strategy for minimizing operating expenses and maximizing revenues for the Cabarrus Arena & Events Center will include:

MINIMIZING OPERATING EXPENSES

Overhead: Minimize overhead through a combination of an appropriate staffing plan, implementation of operations best practices, corporate programs, energy management initiatives, subcontractor oversight, and the use of the County's own Infrastructure and Asset Management department and preferred vendors to maintain the venue's infrastructure.

Event-Related Expenses: A key to financial success is having an optimal staffing plan for part-time event employees. ASM Global has a well-established system of time and attendance controls to ensure these expenses are closely monitored. Working closely with the Complex's users, we ensure the highest levels of customer service are achieved while working within established event budgets. Where appropriate, part-time staffing may be provided by community non-profit groups with wages directly supporting their work.

ASM Global's Leverage: ASM Global will use its size and number of venues under management to leverage the most cost-effective procurement of goods and services from national suppliers that reduce venue operating costs. We currently enjoy Master Service Agreements with several companies that provide discounts on maintenance agreements, services, and products that no other company can match. All these discounts will flow to the Cabarrus Arena & Events Center. Other areas impacted by our purchasing power include employee benefits, training, insurance, and risk management programs.

Cost Controls: ASM Global will use its well-established financial policies and procedures to control operating expenses in all areas of the operation and our internal and external auditing process to ensure accountability.

Regional & Corporate Oversight: Every discipline within the Complex will have oversight at both the regional and corporate levels. These teams of professionals will focus on ensuring we are providing the highest level of service in the most efficient manner possible.

MAXIMIZING OPERATING REVENUES

Food & Beverage Operations: The most significant ancillary revenue stream at any venue is the catering and concessions operation. ASM Global will seek to maximize revenues through the in-house operation of food service through its SAVOR food and beverage division. As detailed in the Operations Plan, we have provided an overview of SAVOR's resources, programs, and strategies that will be implemented.

Technology: ASM Global will combine its knowledge and expertise with the County's Information Technology department's support to ensure the Complex is delivering leading edge experiences in areas such as WiFi connectivity, consumer point-of-sale systems, data security, and in-house audio/video services. ASM Global's Technology Services Department will ensure that the agreements with the communications companies, equipment manufacturers, and service vendors generate maximum revenue for the venue.

Destination Partnerships: Work closely with Explore Cabarrus, the Chamber, Leading Cabarrus in Business, and other Cabarrus hospitality stakeholders, to seamlessly incorporate the ASM Global brand and sales initiatives, and develop a targeted marketing and incentive program to attract groups to specifically identified "need periods" by offering financial incentives and discounts to maximize the Complex's economic impact for the County.

Event Creation: Work with the ASM Global Event Innovation Team on developing locally created and produced events that appeal to the citizens of Cabarrus County and the surrounding area. These events can generate solid attendance levels and introduce the venue to people in the area who could be future users for social functions, meetings, and special events.

Venue Sponsorship: ASM Global's corporate-led initiatives and best practices will aid the local sales team in leveraging venue assets and securing new levels of venue sponsorship revenue. Venue naming rights and beverage pouring rights agreements are examples of future sponsorship growth possible through ASM Global's expertise.

INVESTMENT PROPOSAL

For ASM Global's proposed initial contribution, below are suggested uses and cost estimates for the County's review and consideration.

CONCESSION STAND IMPROVEMENTS / RE-BRANDING \$75,000

- Elevate the environment, creating unique identities for each F&B location
- Includes brand and graphics development, aesthetic changes through temporary wall treatments, and cooking equipment modifications

CONCESSIONS - PORTABLES \$75,000

- Additional points-of-sale and services
- Includes portable cart design, branding, and graphics development

DIGITAL SIGNAGE \$170,000

- Elevated customer service with revenue generating opportunities
- Additional resource for show and event organizers

YOUTH SPORT - BLEACHERS \$30,000

- Enhances the desirability of Complex and service level for youth sport events and tournaments

TOTAL INVESTMENT \$350,000



ASM GLOBAL ROLE IN IDENTIFYING & PRIORITIZING CAPITAL IMPROVEMENTS

ASM Global constantly evaluates the condition of all equipment and infrastructure within the venues we manage daily. The onsite team at the Complex will share information with the contract administrator on a regular basis regarding the need for any capital improvements to maintain consistent and safe operations for the County.

ASM Global contributions for capital expenditures or capital improvements for Cabarrus Arena and Events Center will be held by Cabarrus County in a Capital Contribution Fund. ASM Global will recommend expenditures from this fund for significant equipment and infrastructure-related purchases outside the normal budget process. Cabarrus County will have approval authority to:

- Direct & supervise all capital improvements
- Pay for all capital expenditures & improvements from the Capital Contribution Fund



PROPOSED CONTRACT TERMS TO CABARRUS COUNTY

APRIL 28, 2023



CONVENTION CENTERS | THEATERS | STADIUMS | ARENAS
800 WEST OLYMPIC BLVD, SUITE 305 | LOS ANGELES, CA 90015

In alignment with our strategic initiatives, ASM Global is pleased to present to Cabarrus County the following compensation proposal for the continuation of professional venue management services at the Cabarrus County Arena & Events Center. ASM Global embraces performance-based structures and our proposed innovative pricing proposal and investment are an extension of our comprehensive strategic plan for the Complex:

A Forward Thinking Approach. Continue to evolve and position the Complex as an industry leading venue and destination centerpiece for the County. Central to our targeted approach will be the implementation of best practices, and incorporation of technology, analytics and shared data. Our programs will meet and exceed visitor and guest expectations and “speak to” and deliver for event attendees, both today and in the future. In summary, our goal is for the event experience at the Complex to be award-winning, setting the bar for others to aspire to.

A Significant Financial Commitment. As detailed further below, ASM Global is pleased to offer a **total contribution of up to \$550,000** that will support our detailed, innovative, and forward-thinking business plan and achieve our mutual goals for the Complex. Our proposed uses for this investment will provide transformative enhancements to the customer and user experience, significantly grow revenues for the County, engage the community, and position the Complex at the forefront of the event, hospitality and customer live experience.

PROFESSIONAL MANAGEMENT & VENUE SERVICES:

ASM Global will continue to provide the following services and resources throughout the term of the Agreement:

- Full management services including management, operations, food & beverage, programming, event services, maintenance, and marketing of the Complex.
- Access to and ongoing support from ASM Global's “Best in Class” industry resources, professionals and specialized operating divisions providing the County:
 - Forward thinking technology integration providing real value in terms of revenue generation, guest experiences, and asset enhancement
 - Social responsibility platforms centered around community-based initiatives that invest in people, protect the environment and strengthen the community
 - The world's largest live event marketing platform creating unique engagement opportunities for sponsors, users, exhibitors and visitors
 - Innovative, industry leading partners that will provide enhancements, technology and services that maximize the potential and performance of the assets we are entrusted with
 - The world's largest live event customer experience platform capturing feedback and data to deliver what event attendees expect and desire, now and in the future
 - Venue development and real estate consulting, advising and investing services providing industry leading experience and innovation for future development and venue planning
 - Financial modeling, benchmarking and business plan development in support of short-term and long-term venue and development initiatives and projects

TERM: Five (5) year Initial Base Term commencing on July 1, 2025, with **one (1), five (5)** year renewal option at the sole discretion of the County

BASE MANAGEMENT FEE: **\$90,000** per year, adjusted annually by the CPI (a **21% reduction** from the current base management fee)

MANAGEMENT INCENTIVE FEE: **Qualitative – \$25,000** per year, adjusted annually by the CPI, based upon an evaluation of ASM Global's performance by the County with respect to the following criterion:

- Professional Management
- Maintenance and Operations
- Customer Service

Quantitative – 30% of the excess Operating Revenue over the current rolling Operating Revenue Benchmark (excluding COVID-impacted periods)

F&B BASE FEE: **7.5%** of Gross Food and Beverage Revenue

F&B INCENTIVE FEE: **7.5%** of Gross Food and Beverage Revenue if F&B operation is profitable

SPONSORSHIP COMMISSIONS: **15%** Commission, net of fulfillment costs, on the sale of any **new** commercial partnerships/sponsorships, including the sale of naming rights if desired by the County

CAPITAL CONTRIBUTION: ASM Global will make an initial **\$350,000** capital contribution to the County. The investment will be treated as a grant to the County, not a loan, payable within 30 days of contract execution

- While the City will have ultimate discretion over how the funds are deployed, ASM Global's initial recommendations to the County will focus on **driving additional revenues, maximizing the customer and event experience, engaging the community, and enhancing the marketability of Cabarrus Arena & Events Center to show producers and event organizers**
- The full amount of the Capital Contribution will be amortized on a straight-line, non-interest-bearing basis over **ten (10)** years

ADDITIONAL FUNDING: ASM Global will make available to the County up to **\$175,000** in Additional Funding upon renewal of the contract at the end of the Initial five-year Base Term

SCHOLARSHIP FUND: ASM Global firmly believes that strengthening the communities we touch is a core component of our social responsibility. Cabarrus County offers a unique opportunity where this commitment can be realized while impacting the future leaders of the travel and tourism industry.

ASM Global will make an annual **\$5,000 scholarship donation** to Cabarrus County Schools Academy of Hospitality and Tourism for each year of the Term, a total commitment of **\$25,000**. This donation will fund two annual scholarships, one focusing on culinary arts education and the other in the broader tourism and hospitality management field.

We are flexible regarding the overall compensation structure and will work closely with the County to arrive at business terms which meet all our mutual goals for the continued successful operation of the Complex.

In addition, to the benefit of the County, ASM Global is willing to implement the new compensation structure during the final two (2) years of the current management term, commencing July 1, 2023.



CONVENTION CENTERS | THEATERS | STADIUMS | ARENAS
800 WEST OLYMPIC BLVD, SUITE 305 | LOS ANGELES, CA 90015

CORPORATE SAFETY & RISK POLICIES AND PROCEDURES

CORPORATE RISK MANAGEMENT POLICIES

ASM Global provides our clients with a comprehensive risk management approach to patron and employee safety and security at each facility under our management. Due to our scale, ASM Global can procure premium liability coverages at prices that are often substantially less than market rate, which enables ASM Global to pass these savings onto our clients.

Our Risk Management department includes broad financial expertise, insurance and legal expertise, and specialized loss prevention industry experience in the following areas:

- Insurance coverage negotiation
- Loss prevention
- Contract review
- Regulatory compliance
- Claims administration

INSURANCE COVERAGE PROGRAMS

Corporate insurance programs include general liability, auto liability, umbrella and excess liability, fidelity, workers compensation insurance, and professional liability provided by major insurance companies licensed to do business in our client's home state and whose financial integrity is A- or above. Our liability and workers compensation programs provide first dollar coverage to minimize the financial impact to our facilities operating budgets in the event of a claim. ASM Global's corporate insurance program creates leverage and bargaining power with insurers to obtain the most favorable terms and rates for our clients while creating a consistent management approach to risk in our industry.

LOSS CONTROL INITIATIVES

Our operating philosophy is to assume a proactive role in preventing and reducing the financial impact of losses and claims to our Clients. Our on-site operations directors are trained to perform comprehensive inspection and training programs to maintain the security of the facilities under our management.

Ongoing training programs are also held for employees in patron and personal safety, OSHA compliance and guidelines, and fire safety procedures. These policies are augmented by loss control engineers from the insurance industry who ensure compliance with the latest regulatory changes and safety advancements.



CORPORATE PUBLIC SAFETY POLICIES

All ASM Global operated venues are provided with access to the company's Security and Emergency Management (SEMP) plan created for the protection of people, physical assets, operating systems, equipment, and infrastructure. The security landscape is changing every day and ASM Global continually adapts and remains vigilant to provide a safe and secure environment for our employees, facility users, and guests.

Our approach is guided by the following principles:

Training: All full-time, part-time, and third-party security personnel receive specialized training before field deployment. Table-top exercises, emergency drills and evacuation exercises are routinely practiced creating higher levels of awareness and knowledge.

Safety First: Safety standards are set at the highest level and maintained through operational audit procedures. Our best practice procedures for occupational safety and health reflect the culture of the organization, which puts safety first. All life safety and emergency equipment are routinely inspected, tested, and maintained to ensure proper functionality in the event of an emergency.

Management & Supervision: All safety and security personnel are carefully managed by skilled leadership. A full-time seasoned staff is responsible for supervising all internal security personnel and third-party security subcontractors. Performance tools such as incident mapping are used to measure performance to ensure we are meeting the highest operating standards.

Planning & Coordination: All safety and security efforts are carefully coordinated with the appropriate governmental agencies and local law enforcement. This is done through ongoing planning, communication, and meetings.

Risk & Threat Assessment: ASM Global conducts regular risk and threat assessments designed to identify areas where security posture should be enhanced. Assessments are performed in conjunction with local enforcement agencies who can provide a great source of intelligence against any relevant vulnerabilities.



The result is a comprehensive security program composed of policies, procedures, and guidelines to mitigate risk. Elements of ASM Global's SEMP plan include:

- Crowd Circulation Procedures
- Event Security Procedures
- 24-hour Security
- Access Control Procedures
- Business Continuity Plans
- Spectator Accommodation
- Safe Alcohol Management
- Fire and Life Safety
- Emergency Response & Evacuation Plans
- Integrated Incident Management
- Incident Reporting Procedures
- Precinct Protection Measures
- Surveillance Systems Operation
- Communications

CROWD CONTROL

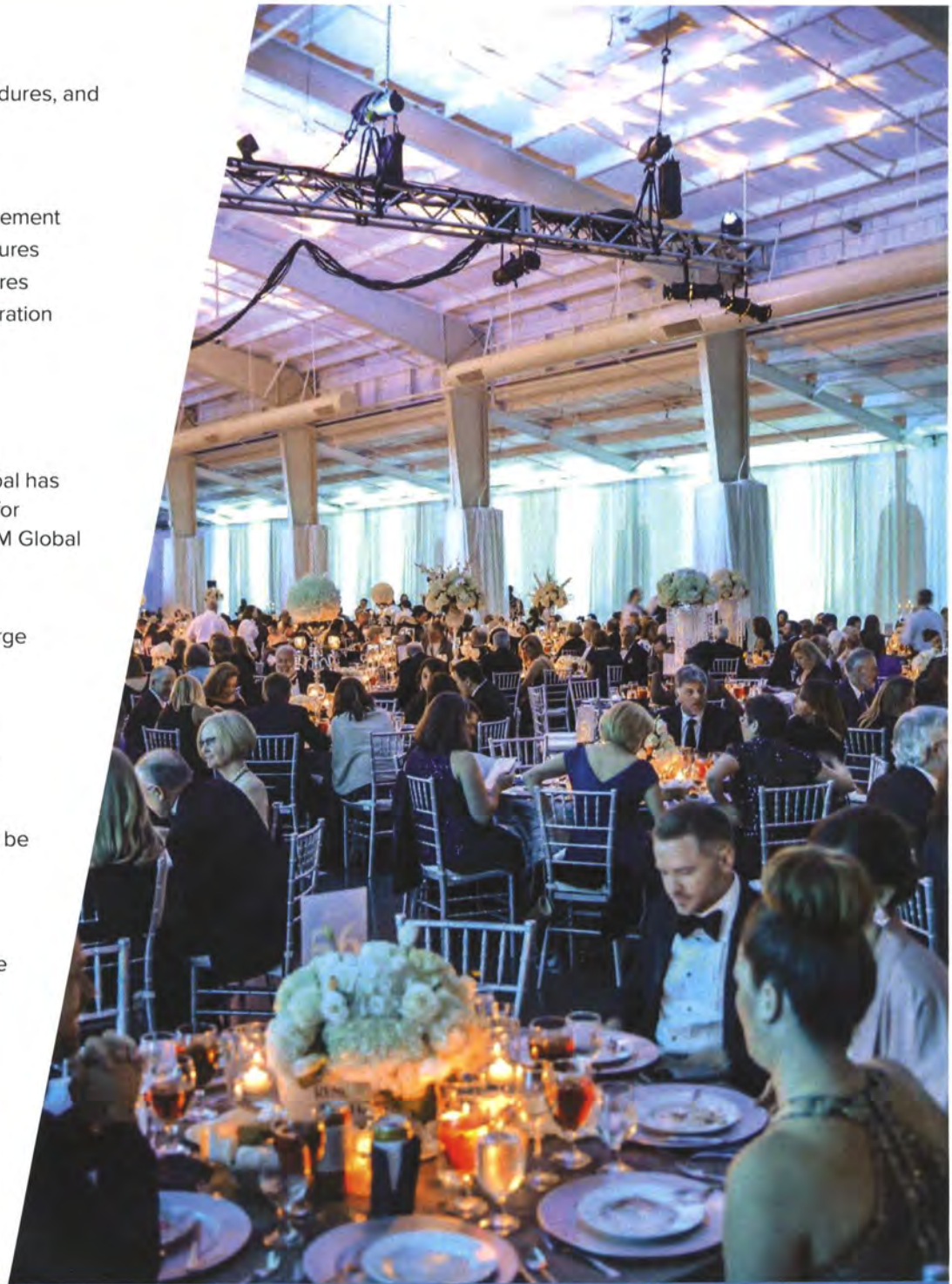
Crowd control measures are activated and in place for each event. ASM Global has established operational best practices, procedural guidelines and protocols for crowd management that can be accessed by venues through O.S.C.A.R. the ASM Global in-house digital library.

- Access control systems to prevent access to unauthorized areas.
- Use of exterior variable message boards and temporary signage to direct large crowds on ingress
- Surveillance equipment to monitor crowd movements and behavior
- All events are sufficiently staffed by trained personnel
- Monitor ticket scan counts on ingress to benchmark proper crowd flow and calibration of gate entry

Enhanced alcohol management to avoid excessive consumption. All staff will be required to participate in alcohol management training programs.

INCIDENT MANAGEMENT SYSTEMS (IMS)

ASM Global operates under a unified Incident Command structure to manage public safety, crowd management security during each event. The structure allows for maximum integration between all functional departments including the local police department, emergency services, and service providers to manage an incident should one occur. Other functional aspects of the Incident Command may include social media monitoring, weather advisory, traffic control, and CCTV surveillance monitoring.



SURVEILLANCE SYSTEMS

ASM Global uses video surveillance systems (VSS) that include high resolution cameras, effective data storage methods, and the capability to meet or exceed the current industry best practices. Security Surveillance Systems are designed to monitor areas of interest such as:

- Main Entrances
- Public Areas
- Circulation Areas
- Exits
- External Areas & Boundaries
- Main entrances, public areas, circulation areas, exits, external areas and boundaries

Surveillance logs and recorded images must be kept in accordance with ASM Global guidelines.

ASM GLOBAL OCCUPATIONAL SAFETY & HEALTH PROCEDURES

ASM Global's Corporate Operations personnel are authorized OSHA trainers and experts in venue operations. This combination is unique to ASM Global and a testament to delivering the highest standards of venue management to ASM Global's clients. All ASM Global facilities are required to maintain current written safety programs and staff and user training sessions on an annual basis in addition to other safety-focused requirements.

ASM Global venues must maintain Safety Committees to administer safety and health programs and identify, evaluate, and respond to conditions and issues that could represent a threat to the safety or a potential loss to our clients.

Our Operations Department conducts facility audits to ensure the optimal utilization and efficiency of our safety & health, maintenance, and operations programs. ASM Global reviews all programs, training, and physical site conditions at venues on an annual basis to ensure goals are met.



RISK RETENTION & RISK TRANSFER

Contractual transfer is designed to ensure that the intentions of the parties are being met by the contract wording and the applicable insurance policies. Contractual transfer allows both our clients and ASM Global to shift the financial impact of a loss to the appropriate party. By using standardized contract terms for all lessees and contractors, ASM Global guarantees its clients the highest degree of financial protection and uniformity. Any requests for deviations from established contract wording are submitted to corporate risk management professionals for review and approval in accordance with management controls.

RISK MANAGEMENT FOR EVENTS WITH ADDITIONAL LIABILITY CONCERNS

ASM Global is acutely aware that certain events, for a variety of reasons, raise liability, safety, and reputation concerns, not only for ASM Global, but also for its clients and patrons. ASM Global analyzes each such event and its potential consequences utilizing its vast network of facilities, industry, and risk management experts. ASM Global can then recommend staffing levels, type of staff, risk management, and patron service options for success. ASM Global can even assist event sponsors with obtaining required insurance coverage thru its Master Venue Program (MVP).

CYBER SECURITY POLICY

ASM Global employs a wide range of security measures and controls to prevent and mitigate various cyber threats including:

MALWARE PROTECTION: ASM Global uses advanced anti-malware software and regularly updates it to detect and remove any potential malware or viruses.

NETWORK SECURITY: ASM Global's network is protected by firewalls and intrusion detection systems that monitor for any unauthorized access attempts and suspicious activity.

ENCRYPTION: All data is encrypted in transit and at rest using state-of-the-art encryption protocols to protect it from interception and unauthorized access.

ACCESS CONTROLS: Access to the ASM Global system is strictly controlled and monitored, with role-based access control and multi-factor authentication implemented to prevent unauthorized access.

REGULAR UPDATES & PATCHES: ASM Global regularly updates and patches its systems and software to address any known vulnerabilities and protect against emerging threats.

PHISHING PREVENTION: ASM Global educates its staff on how to identify and prevent phishing attacks and uses email filtering and other security tools to detect and block phishing emails.

DENIAL-OF-SERVICE PREVENTION: ASM Global uses network traffic analysis and other measures to detect and mitigate denial-of-service attacks.

INSIDER THREAT PREVENTION: ASM Global has strict policies and procedures in place to prevent insider threats, including background checks on all staff, regular security awareness training, and access controls to limit access to sensitive systems and data.

Overall, ASM Global employs a comprehensive security program to protect against a wide range of cyber threats, and continually monitors and updates its security measures to stay ahead of emerging threats.





BOOKING SERVICES

MARKETING OVERVIEW

ASM Global's existing programming and event partnerships and alliances will be utilized on both the national and regional levels. Our local ASM Global Team, with the support of our Corporate and Regional programming and marketing personnel, will continue to be engaged daily to maximize the quantity and quality of events at Cabarrus Arena & Events Center.

The Sales and Marketing Plan for Cabarrus Arena & Events Center will correlate directly with the County's objectives including, but not limited to:

- Promoting the Complex for Community Use & Public Service
- Generating Greater Economic Impact for the Region
- Formalizing the "Cabarrus Alliance"

ASM Global works with Explore Cabarrus and local destination partners and hospitality stakeholders to develop cooperative opportunities to work together to generate leads and industry visibility for Cabarrus Arena & Events Center and the destination.

Our Conventions & Meetings Marketing Division participates in 15 tradeshow and meetings annually, representing our venues in a variety of markets such as consumer shows, meetings and conventions, sport shows, esports events, and direct selling. We invite our venues and destination partners to attend these events at a fraction of what it would cost if they were to attend individually.

ASM Global is a member of major associations with regional business opportunities, including:

- Professional Conference Management Association (PCMA)
- Religious Conference Management Association (RCMA)
- Meeting Professional International (MPI)
- Association of Chief Executives in Sport (ACES)
- Sports Events & Tourism Association (Sports ETA)
- National Association of Consumer Shows (NACS)



We will work collaboratively with Explore Cabarrus and the local Chamber of Commerce to develop a Cabarrus Alliance that will include representatives from local hotels and other hospitality stakeholders. Together we will work to supplement the existing annual events, events for entertainment, meetings, and festivals to fill the balance of the calendar. Through the introduction of the Cabarrus Alliance, ASM Global will:

- Increase Economic Impact & Collaborative, Efficient Relationship for all Hospitality Stakeholders
- Expand Bookings through the Establishment of a Specific Booking Policy for all Events
- Elevate Cabarrus as a Highly Desirable Destination for Live Entertainment, Sports, Meetings, Conventions & Festivals

The Cabarrus Alliance will develop new concepts, strategies, and ideas that will evolve to meet the group's changing needs. The Cabarrus Alliance will support a collaborative relationship with increased efficiencies created by reducing duplicate efforts from each partner while presenting a cohesive message. The Cabarrus Alliance will save each partner marketing and advertising dollars.



At our Annual Sales Meeting each December, the day before IAEE, ASM Global provides our venues and sales teams the opportunity for peer-to-peer learning and mentorship. ASM Global conducts regular virtual sales meetings with similar sized venues hosted by a Regional Director of Sales, with the goal of discussing and sharing rotational business.





CUSTOM EVENT INNOVATION

ASM Global realized the value of creating special events and festivals for our unique clients and communities throughout North America. These events support the goals and objectives each client we serve and increase community involvement, helping to support the financial objectives of each venue and municipality. To assist with event creation at the Complex, ASM Global has established an Event Innovation Team.

These dynamic Team Members have extensive experience in creating events and have held senior positions in producing each of the special events they recommend. They are available to research your unique venue and community goals and recommend a plan for successful event implementation.

The Event Innovation Team have established a portfolio of successful event "Kits" that can serve as templates for the Complex and will serve as hands-on consultants to provide guidance and support throughout the event creation process.



The staff at CAEC are the best. They exceed excellence. Always courteous and helpful. I always look forward to coming to work at CAEC.

-NC DOT Field Service Classes



APPROACH TO BOOKING & EVENTS

ASM Global's unmatched positioning and footprint in the worldwide live entertainment, sports, and events industries will elevate the awareness and platform of Cabarrus Arena & Events Center with key decision makers.

LIVE ENTERTAINMENT PROGRAMMING SUPPORT

Relative to guidance and assistance to Cabarrus Arena & Events Center staff for event scheduling, show setup, ticket management, marketing efforts, event contract settlement, and other areas, ASM Global is prepared and best positioned to support all these functions and event requirements. On a national and regional level, ASM Global has specialized divisions and subject matter experts that can be engaged as needed or on an ongoing basis to support the local Cabarrus Arena & Events Center staff.

PROGRAMMING AND BOOKING EXPERIENCE

ASM Global is the market leader in programming and booking public assembly venues worldwide. It has the industry leverage, background, and experience to deliver a diverse mix of events to Cabarrus Arena & Events Center. It maximizes its relationships and partnerships with leading content and programming providers to deliver a rich variety of must-see performances and events and must-attend trade show exhibits for every ASM Global venue around the world.

FULL-TIME DEDICATED CORPORATE BOOKING RESOURCES

No other company has the strength to provide block booking power and leverage as ASM Global. Our domestic and international venues provide the market position, capacity, and ability to deliver the best possible leverage to secure world-class content. This powerful network creates maximum programming opportunities with special events and artists that tour throughout the country (and the world). It allows ASM Global to leverage and promote our arenas and negotiate the best possible deals for events.

"It was truly a pleasure working with such professionals..."

- Carolina Alpaca Breeders and Owners



No other company maintains the same depth and breadth of industry entertainment relationships with event promoters, artists, and managers as ASM Global. **The following is a short list of the things we deliver to each of our facility managers:**

- **Daily Contact with the Industry's Key Decision Makers, Agents, Managers & National Touring Promoters to Assist in Routing Events and Advocate for Dates in ASM Global Venues**
- **Regularly Scheduled Conference Calls with our General Managers on Both a Regional & National Basis to Share Information on Upcoming Tours and Events**
- **Exchange Booking Leads and Deals & Compare Event Experiences and Best Practices**
- **Private, ASM Global-Only Meetings at National Conferences such as International Entertainment Buyers Association & Billboard Music Conference**
- **Guest Speakers from Leading Talent Agencies**
- **Senior Executives from National & Regional Promoters**
- **Industry-Leading Website Development & Management**
- **Marketing Automation Including E-Blasts to Subscribers Featuring Enter-to-Win Promotions, Pre-Sale Offers, Event Announcements & Other Cabarrus Arena & Events Center-Related News**
- **All-Inclusive Social Media Campaign Planning & Management**
- **Quarterly and Ad-Hoc Market Data Reporting & Analysis**
- **Search Engine Marketing**

ASM Global understands and embraces the importance of strong local partnerships with key destination partners, stakeholders, and tenants. We will share and introduce sales and marketing models, initiatives, and creative techniques that have been proven successful elsewhere to support our mutual goals for each organization, the Complex, Community, and County.

"Our experience with ASM Global and the staff at Cabarrus Arena & Events Center over the years has been outstanding. They have been true partners in providing the best possible experience for our staff, our exhibitors, and our guests. Their cooperation in overcoming problems, willingness to take risks to enhance the guest experience, and attention to "behind the scenes" details make the Concord show one of our favorites each year."

- Dave Johns, Vice President
Carolina Shows, INC





APPROACH TO MARKETING

EVENT MARKETING & PROMOTION

The Cabarrus Arena & Events Center operates in two very distinct and separate industries – live entertainment and sports, and conventions, meetings, and hospitality.

Central to our marketing approach are our resources, relationships, leverage, and brand in both industries to provide the Complex the visibility and a “voice” with decision makers and event organizers. Working closely with Explore Cabarrus, and other local partners, our plans will drive business to Cabarrus.

Our targeted plan will incorporate the homework we have done to “hit the ground running.” ASM Global understands the uniqueness of the Cabarrus destination, its tremendous opportunities, and the challenges to overcome.

ASM Global is a member of major associations with regional business opportunities including, but not limited to:

- Professional Convention Management Association (PCMA)
- Religious Conference Management Association (RCMA)
- Meeting Professionals International (MPI)
- Association of Chief Executives for Sport (ACES)
- Sports Events & Tourism Association (Sports ETA)
- National Association of Consumer Shows (NACS)

BUSINESS-TO-BUSINESS EVENT MARKETING

Through our network of industry experts, these groups identify new opportunities to highlight our venues through leadership positions in key live entertainment industry events in North America:

- Billboard Live Music Summit
- International Entertainment Buyers Association (IEBA)
- The Event and Arena Marketing Conference (EAMC)
- International Association of Venue Managers (IAVM)

In these organizations and at these events, ASM Global representatives hold organizational and leadership positions in addition to advancing our venues’ brands by participating in speaker panels and seminars. We showcase sold-out shows at our venues by placing ads in industry publications. These ads are seen by promoters and agents and demonstrate why events should be hosted at ASM Global venues.

Specific to Cabarrus Arena & Events Center and through our extensive corporate B2B Marketing resources, we have developed sales materials that include:

- Industry Sales Deck
- Mobile Optimized Websites
- Social Media Accounts
- E-mail Marketing

Cabarrus Arena & Events Center is perfectly positioned with other regional venues we manage in the United States, allowing us to maximize the potential of the venue. Our network, supported by the senior regional management team, will provide operational resources, event services support, booking and programming synergies that present key opportunities, and marketing and promotional support to the Complex.

BUSINESS-TO-CONSUMER EVENT & VENUE MARKETING

What every event organizer and entertainment promoter want to hear is that your facility will help drive attendance and/or sales. Once an event is booked, ASM Global:

- Engages the Local Market Through Various Marketing & Engagement Mediums
- Conducts Independent Outreach for ASM Global Produced Events & Collaboratively for Third-Party Promoted Events
- Develops Marketing Plans Specific to Each Event to Create an Effective Campaign, Considering:
 - Market Conditions
 - Demographics
 - Relationships that can be Leveraged

ASM Global analyzes our budgets, making sure we are getting the most value for our dollar. We will negotiate added value trades and promotions. This has been proven more effective than just standard media (print, outdoor, radio, TV) purchases alone. Areas of subject matter expertise of our B2C marketing team include (but certainly are not limited to):

- | | | |
|---------------------|-----------------------|----------------|
| • Digital Marketing | • Grassroots | • Publicity |
| • Traditional Media | • Database Management | • Partnerships |



ASM Global Corporate Marketing will provide support and marketing innovations to the local on-site team for the local community. With our family of venues, we have developed a network of marketing experts. Our marketing professionals have expanded outreach across all platforms at ASM Global venues.

ASM Global's local on-site marketing team works with each promoter to establish their announcement and "on sale" dates in conjunction with the Box Office, and obtains the proper graphics needed to activate all complimentary promotional opportunities for events held throughout the Complex.

Complimentary promotional opportunities include:

- | | |
|--|----------------------------------|
| • Media Planning & Purchasing Assistance | • Social Media & Email Marketing |
| • Press Release Distribution | • Website Calendar of Events |
| • Coordination of Applicable Interviews | • Exterior Marquees |



ASM Global has worked with our Convention and Visitor Bureau partners at Explore Cabarrus, along with other destination stakeholders such as the Chamber of Commerce, since assuming management of the Complex in 2005. This partnership is focused on creating greater economic impact for the County through:



- Booking large events with significant hotel room nights
- Increasing the visibility of the destination among meeting planners
- Promoting the Complex for Explore Cabarrus FAM tours

To maximize event days at the complex, the ASM Global team along with our destination partners promotes the Complex's facilities through:

- Placing ads in:
 - Regional Social Publications
 - Meeting Planners Publications & Websites
 - Local Visitor Guides
 - Targeted Social Media Sites
- Maintaining a listing in Wedding Wire & The Knot to promote the Complex as a wedding venue
- Hosting destination partner events to connect with local businesses & showcase catering capabilities
- Participating in cross promotions with local destination partners

PUBLIC EVENT MARKETING

The ASM Global Sales & Marketing team at the Complex is very active in promoting events through its digital channels and through targeted advertisements on in local publications, websites, and broadcast media. The team has been successful with marketing public events through:

- Promotions in electronic newsletter with over 17,000 subscribers
- Social media posts & promotions
- Collaborating with promoters for social media advertising
- Working with local media stations to promote events in exchange for tickets
- Promoting events through local destination websites that feature events "happening in town"

The team promotes premium executive suite sales through the venue website for all major concerts and events.



ASM GLOBAL NAMING RIGHTS & SPONSORSHIPS

If desired by the County, ASM Global will utilize the resources and expertise of our dedicated Commercial Partnerships division to support naming right valuation and sales efforts.

Partnership Development

ASM Global's sponsorship team, led by Jason Oberlander, Chief Commercial Officer, is fully powered and integrated with our affiliate company, AEG Global Sponsorships ("Global Partnerships"). Our full-service team of more than 150 sales and service professionals across the globe supports sales and brand activations across the AEG and ASM Global asset portfolio of more than 350 convention centers, stadiums, arenas, venues, sports teams, music festivals & tours, ticketing, and digital media. A few of our notable assets include Crypto.com Arena (Formerly Staples Center), Toyota Arena (Ontario CA), T-Mobile Center (Kansas City, MO), Coca Cola Music Hall, (San Juan, PR) LA Kings & LA Galaxy, Coachella, Stagecoach, New Orleans Jazz & Heritage Festival, and AXS.com. Our end-to-end services include prospecting, ideation, valuation, sell-through, contract negotiation, partnership activation, and renewal.

Global Partnerships negotiates and delivers more than \$600 million in annual property sales and is the authoritative voice when it comes to Naming Rights transactions, having negotiated more naming rights deals than any agency of its kind.

"I have been involved with all CCEF's Partners in Education luncheons and I can state unequivocally that this one was the best. Thank you for hosting our annual luncheon... every single staff member went out of his/her way to make it a great success."

- Cabarrus County Education Foundation



Valuation & Package Development

ASM Global is uniquely positioned to identify new, and optimize existing, sponsorship commitments across physical and digital landscapes. We are always looking to build upon the base level benefits of a naming rights or founding sponsorship package with opportunities to leverage new technology and experiential platforms that create value for the brand, convention center, and audiences.

We have strategic valuation partnership with Wasserman, POV Sports Marketing, and others that utilize scorecard and ratio analyses to properly evaluate, strategize, and price an offering to the marketplace. From exposure and resonance to impressions and results, the compelling benefits of the package will be effectively communicated to prospects through content developed by ASM Global Creative Services and marketed through our experienced sales teams.

Sales & Negotiations

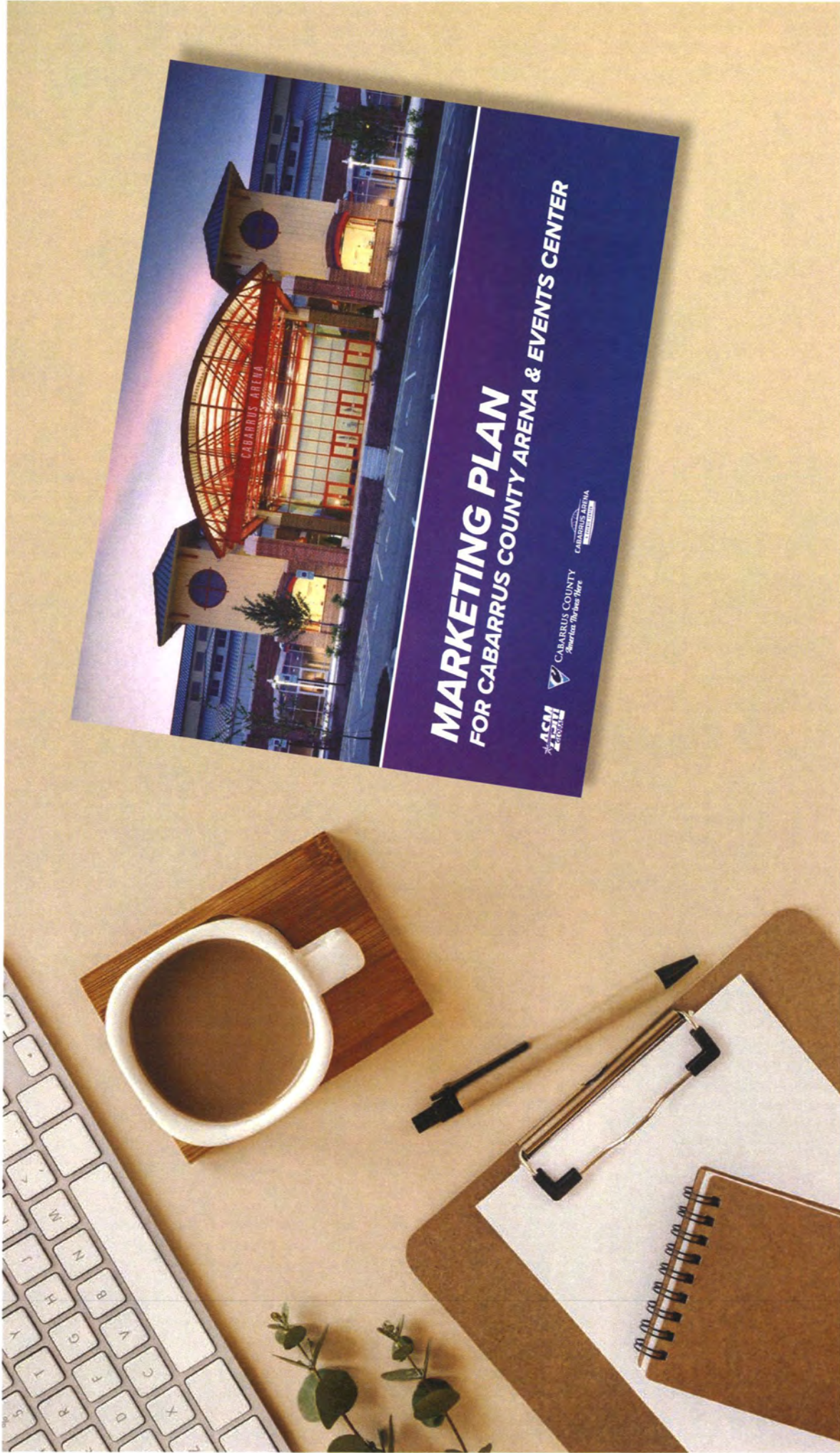
ASM Global drives commercial partnerships through a diverse client roster of brands from Fortune 500 to modern and innovative start-ups. Our expertise in the creation, development, and positioning of sponsorship packages is applied to attract, retain, and optimize sponsor relationships. Once the key business terms are finalized with legal counsel, our dedicated activation manager ensures all terms for the Naming Rights are fulfilled annually. Global Partnerships amplifies brands with unforgettable fan experiences and engagements that provide partners with the tangible and measurable ROI that is critical to upsell and renew the contract.

ASM Global prides itself on the relentless pursuit of aligning best-in-class brands with best-in-class properties. Through our local, regional, national, and global representation, we will balance business goals with community objectives, focusing on prospects that are connected to and invested in the economics of the Southeast Region.

“Your facility and staff could not have done better for our event. Their availability and willingness to help was beyond compare again this year.”

- Oasis Shrine Circus





SAMPLE MARKETING PLAN

Should the County desire the local management team to develop an annual marketing plan for the Complex, we have provided a sample marketing plan in the Appendix.



DEFINING SUCCESS FOR THE CABARRUS ARENA & EVENTS CENTER

Meeting and exceeding the County's goals for the Cabarrus Arena & Events Center is ASM Global's view of success. To achieve this, an open line of communication and partnership between the County, the ASM Global onsite management team, and corporate support will provide the platform to develop realistic goals and strategies for success.

Collaboration between the County, Explore Cabarrus, destination stakeholders, and ASM Global's management team and network of services will maximize the Complex's position as a true centerpiece community asset. Core initiatives and tools to do this include, but are not limited to:

- Diverse programming
- Fiscal responsibility
- Creativity
- Delivering outstanding customer experiences
- Collaboration & innovation with all destination stakeholders
- Local participation & opportunity

Working with the County and incorporating all initiatives, systems, and resources, ASM Global will achieve the financial, economic, and community-based goals that we are tasked with.



REFERENCES



REFERENCES

OSCEOLA EVENT CENTER

3141 N Orange Blossom Trl
Kissimmee, FL 34744

Beth Anne Knight
Chief Operating Officer

1 Courthouse Square, Suite 4700
Kissimmee, FL 34741
Phone: 407-742-2392
Fax: 407-742-2391
Email: Beth.Knight@osceola.org





REFERENCES

WILMINGTON CONVENTION CENTER

10 Convention Center Drive, Wilmington NC 28401

Kim Hufham
President & CEO

New Hanover County Tourism Development Authority
1 Estell Lee Place, Wilmington, NC 28401
Phone: 910.332.8746
Email: KHufham@wilmingtonandbeaches.com





REFERENCES

CHARLOTTE HARBOR EVENT AND CONFERENCE CENTER

75 Taylor St, Punta Gorda, FL 33950

Cheri J. Alexander, C.P.M., CPPB
Acting Senior Division Manager, Purchasing

Charlotte County Purchasing Division
 18500 Murdock Circle, Suite 344
 Port Charlotte, FL 33948
 Phone: 941.743.1548
 Email: Cheri.Alexander@CharlotteCountyFL.gov





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SAVOR...
THE EXPERIENCE.

Catering Menu

Cabarrus Arena & Events Center



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- 15 RECEPTIONS
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SAVOR...
CABARRUS
ARENA & EVENTS CENTER



WELCOME TO SAVOR **EXPERIENCES &** **SUSTAINABILITY**

Our Mission

Our mission is to enrich guest experience, building upon your vision through food – listening, learning, growing, harvesting, cooking and breaking bread together.

At SAVOR, we aspire to design a visitor experience so inclusive, so delicious, and so incredible that it will live as your signature food offering for years to come. An example is our flavor-first plant-based menu. The dishes look and taste great, and they are suitable for vegans, vegetarians, flexitarians, and everyone who is looking for more plant-based options.

Curating stories through food creates a powerful bond between people, place and time. And in an instant, a flavor, a taste or a familiar aroma transports us all to a memory—a snapshot in time with family and friends. That is the power of food. We strive to build on those moments.

We seek out partnerships with local chefs, restaurateurs and farmers, who will help us shape a singular dining experience known only at your venue, set within the unique backdrop of your community.

We showcase who we are by focusing on where we are and customizing experiences.

Sustainability

Our sustainability initiatives include purchasing locally produced and sustainably raised products, sourcing sustainable seafood, using non-petroleum-based products, and recycling and composting our waste whenever possible.

Allergens & Food Safety

We are focused on providing an inclusive environment to all your attendees. Whether your guests have a food allergy, food intolerance or dietary preference such as a vegan or vegetarian, our teams are trained and our menus are tailored to meet your needs.

Our Sales Team, Chefs and Managers have all taken and passed a ServSafe Allergen course and understand how to prepare safe food for your guests. We will offer the best in guidance and suggestions to provide a safe and welcoming dining environment for your event.

Speak with your Sales Representative about any anticipated dietary concerns as early as possible to ensure the most seamless service.

Look for these labels throughout the menu:





ENHANCING THE GUEST EXPERIENCE

CHAD MULLER, FOOD & BEVERAGE MANAGER

SAVOR-ASM GLOBAL | CABARRUS ARENA & EVENTS CENTER

Chad is a hospitality leader with over 25 years of experience as a chef in the Finger Lakes area of upstate New York and the Charlotte, North Carolina region. He has led the Cabarrus Arena & Events Center's culinary team for 15 years providing excellent customer experiences to its guest and works directly with event organizers to fulfill their food and beverage requests.

Chad has provided diverse culinary services to over 2,000 events with concepts ranging from corporate meetings, concerts, family events, sporting events, weddings and many community related events.

Chad continuously explores ways to enhance food and beverage experiences maximizing profitability for the facility. He has gained extensive knowledge in the service industry through lending culinary support for large events and venues such as:

- McCormick Place, Chicago Illinois
- Savannah Trade Center, Savannah Georgia
- Richmond Coliseum, Richmond Virginia
- Gulfstream Business Aviation Conferences, Atlanta Georgia, Orlando Florida, Las Vegas Nevada

SAVOR... The Experience of our culinary staff in action as they create some of their classic cuisine and modern creations

<https://www.savorasmglobal.com>

SAVOR...
CABARRUS
ARENA & EVENTS CENTER



BREAKFAST **START YOUR DAY.**

BUFFETS • PLATED • ADDITIONS & ENHANCEMENTS



START YOUR DAY!

BREAKFAST.

*All Breakfast Buffets include Orange Juice, Coffee, and Water.
Prices based on 90 minutes of service. 25 guest minimum. Priced per person.*

CONTINENTAL

THE CABARRUS

Assorted Muffins, Danish, and Scones and
Fresh Fruit Salad

LIGHT & HEALTHY

Assorted Yogurts with House-Made Granola and
Fresh Fruit Salad

NEW YORKER

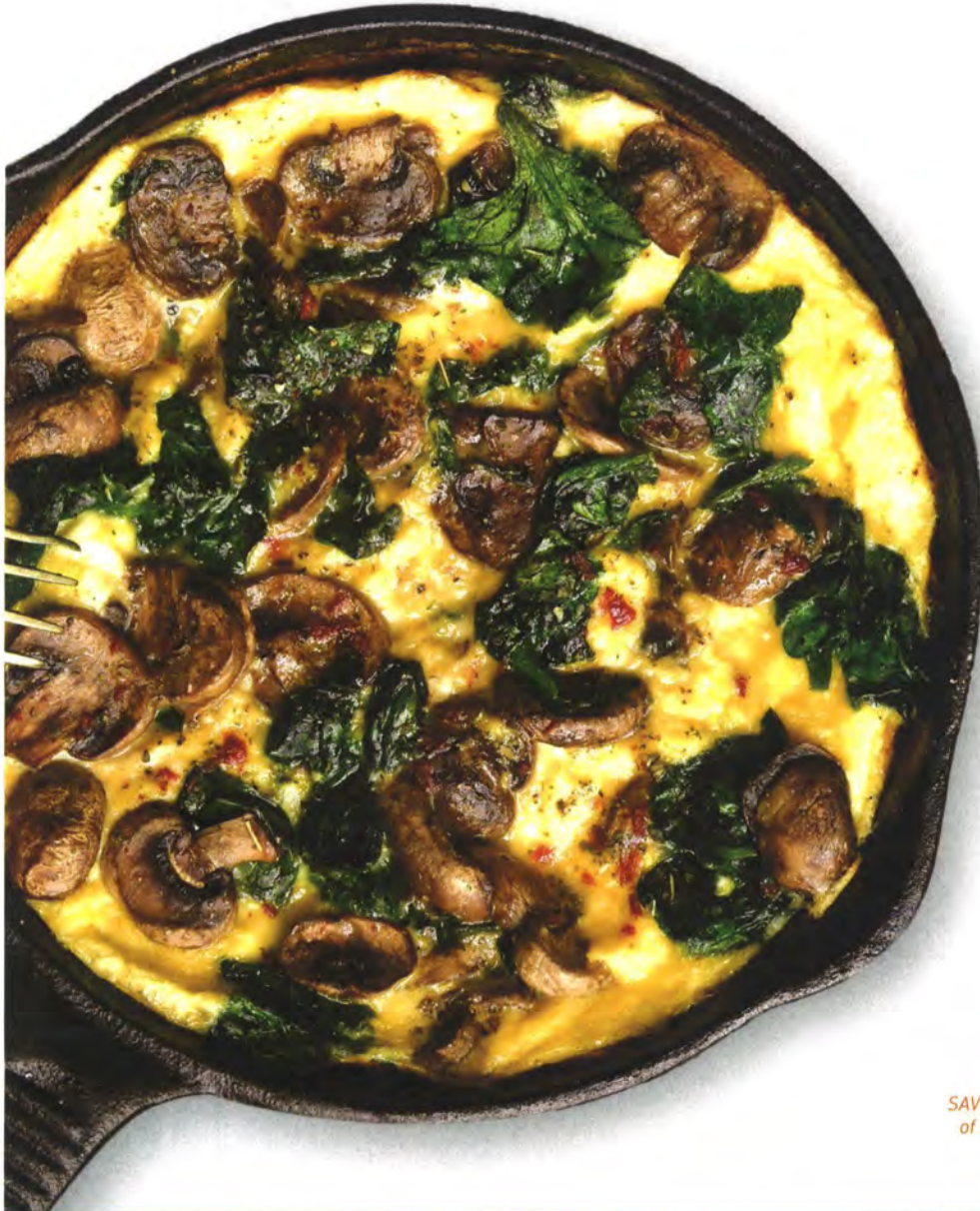
Assorted Bagels with Honey Butter and
Flavored Cream Cheese and Fresh Fruit Salad

SWEET AWAKENING

Pecan & Cinnamon Rolls, Assorted Danish & Donuts,
and Fresh Fruit Salad

*SAVOR... reserves the right to make menu substitutions and revise the style
of service due to supply interruption and/or health and safety regulations.
Prices subject to 20% service charge and applicable sales tax.*

SAVOR...
CABARRUS
ARENA & EVENTS CENTER



BREAKFAST BUFFETS

*Prices based on 90 minutes of service.
25 guest minimum. Priced per person.*

Includes Scrambled Eggs, Orange Juice, Coffee and Water

One Entrée and Two Accompaniments

Two Entrées and Two Accompaniments

Three Entrées and Two Accompaniments

ENTRÉE CHOICES

FRENCH TOAST

PANCAKES (ASSORTED)

BISCUITS & GRAVY

BREAKFAST BURRITOS

BELGIAN WAFFLES

HAM

SAUSAGE PATTIES

BACON

EGGS BENEDICT

SPINACH FRITTATA

ACCOMPANIMENTS

ENGLISH MUFFINS

OATMEAL

HASH BROWNS

FRUIT SALAD

ASSORTED BAGELS

ASSORTED WHOLE FRUIT

GRANOLA BARS

COUNTRY GRITS

ASSORTED YOGURTS

ASSORTED DANISHES

ASSORTED DONUTS

ASSORTED MUFFINS

FRESH BISCUITS

INDIVIDUAL CEREALS

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SAVOR...
CABARRUS
ARENA & EVENTS CENTER

BREAKFAST STATIONS

THE SUNRISE OMELET STATION

Farm Fresh Eggs, Local Grown Tomato, Applewood Smoked Bacon, Sausage, Honey Ham, Fresh Spinach, Diced Red Onion, Button Mushrooms, Diced Bell Pepper, Fresh Salsa, Cheddar & Feta Cheeses

BELGIAN WAFFLE STATION

Warm Vermont Maple Syrup, Assortment of Whipped Butter, Fresh Seasonal Berries, Whipped Cream

BUTTERMILK PANCAKE STATION

Warm Vermont Maple Syrup, Assortment of Whipped Butter, Chocolate Chips, Fresh Seasonal Berries, Whipped Cream



PLATED BREAKFASTS & BREAKFAST MEETING BREAKS

All Breakfast Buffets include Orange Juice, Coffee, and Water.

Prices based on 90 minutes of service. 25 guest minimum. Priced per person.

SUNRISE SCRAMBLER

Fluffy Scrambled Eggs with Cheddar Cheese

Choose One: Applewood Bacon OR Pork Sausage Links

Choose One: Breakfast Potatoes OR Hash Brown Casserole

THE SOUTHERN SUNRISE

Fluffy Scrambled Eggs

Country Fried Steak with Peppered Gravy

Choose One: Breakfast Potatoes OR Hash Brown Casserole

"STUFFED" FRENCH TOAST

French Toast with Strawberries and Cream Cheese
Bacon or Sausage with Fresh Fruit

EGGS BENEDICT

Poached Eggs with Traditional Hollandaise on an
English Muffin with Canadian Bacon
Fresh Fruit and Home Fries

BREAKFAST MEETING BREAK #1

Smoothie Station (includes attendant)
Omelet Station with Assorted Accompaniments
Hash Browns, Bacon, and Sausage

BREAKFAST MEETING BREAK #2

Smoothie Station (includes attendant)
Omelet Station with Assorted Accompaniments
Hash Browns, Bacon, and Sausage
Assorted Fresh Fruit & Granola
Assorted Bagels with Cream Cheese

ADDITIONS

REGULAR &
DECAF COFFEE per gal

SWEET &
UNSWEET TEA per gal

BOTTLED WATER ea.

ASSORTED BOTTLED SODA ea.

HOT TEA per gal

FRUIT PUNCH per gal

LEMONADE per gal

SAVOR...
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LUNCH & DINNER SO MANY CHOICES.

ON-THE-GO LUNCHES • BUFFETS • PLATED

LUNCH.

BOX LUNCHES

Prices based on 90 minutes of service with 25 guest minimum. Priced per person. All Boxed Lunches Include: Chef's Selection of Chips & Cookie. Bottled Water or Soda, Side of Mustard/Mayonnaise (when applicable). Sandwiches as a tortilla wrap can be provided at no additional charge.

HONEY HAM

Focaccia Bread, Field Greens, Tomatoes, and Red Onion

MESQUITE TURKEY WITH APPLEWOOD SMOKED BACON

Swiss Cheese, Applewood Bacon, House-Grown Basil Aioli with Lettuce & Tomato on Ciabatta Bread

SLOW ROASTED BEEF

Kaiser Roll with Cheddar Cheese, Horseradish Sauce, Lettuce, and Tomato

PESTO CHICKEN WRAP

Fresh Basil Pesto tossed with Grilled Chicken, Lettuce, Tomato, and Parmesan Cheese in a Flavored Wrap

GRILLED VEGETABLE WRAP

Zucchini, Squash, Red Onion, Tomatoes, and Portobello Mushrooms Rolled in a Flavored Wrap

CHICKEN SALAD CROISSANT

Buttery Croissant topped with Chicken Salad, Lettuce, and Tomato

SANTA FE CHICKEN WRAP

Grilled Chicken, Black Beans, Roasted Corn and Red Peppers, Lettuce, Tomato, and Spicy Mayo

ROASTED CAPRESE SANDWICH

Tomatoes fresh off the grill with Buffalo Mozzarella and Basil Aioli on Focaccia, Dressed with Extra Virgin Olive Oil and Balsamic Vinegar

CAESAR WRAP

Crisp Romaine Lettuce with Garlic Caesar Dressing and Grilled Marinated Chicken and rolled in a Flavored Wrap

ADDITIONS

WHOLE FRUIT (Apples, Bananas, & Oranges)

50 person minimum

BAGS OF CHIPS

35 person minimum

SIDE SALAD

35 person minimum

CHOICE OF PASTA, POTATO, OR MACARONI SALAD

35 person minimum

SAVOR...
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ARENA & EVENTS CENTER

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LUNCH & DINNER

PLATED LUNCH & DINNER

Includes Rolls and Butter, Tea, Coffee, and Water. Prices based on 90 minutes of service, 25 guest minimum. Priced per person. All Plated Lunch & Dinners come with preset Salad and preset Dessert.

COUNTRY STYLE MEATLOAF

Old-Fashioned Meatloaf with Mushroom Gravy, Mashed Potatoes and Seasonal Vegetables

GRILLED ASIAN SALMON

Grilled Salmon with Hoisin-Teriyaki Glaze, Fried Rice and Asian Vegetables

CHICKEN MARSALA

Baked Chicken with Mushroom-Marsala, Garlic Mashed Potatoes and Roasted Squash & Zucchini

PAN SEARED CHICKEN

Pan Seared Chicken Breast with Cabernet Sauce, Sweet Potato Casserole and Seasonal Vegetables

CHICKEN PARMESAN

Breaded Chicken Breast Fried till Golden Brown with Marinara Sauce & Cheeses, Angel Hair Pasta and Seasonal Vegetables

PRIME RIB

Chef's Seasoned Prime Rib Roasted with Garlic and Herbs, Roasted Shallot Mashed Potatoes and Green Beans

BBQ GRILLED CHICKEN

Savory Grilled Chicken served with Rice Pilaf and Garlic Roasted Green Beans

BACON WRAPPED FILET

Grilled Beef Tenderloin Filet with Roasted Garlic Mashed Potatoes and Grilled Asparagus

BAKED OR BLACKENED SALMON

Baked or Blackened Salmon with Tomato-Creole Sauce and Wild Rice

VEGETARIAN LASAGNA

Fresh Vegetables in a Creamy Layered Alfredo Sauce served with Garlic Bread

CHEERWINE BRAISED BEEF SHORT RIB

Slow-Braised Short Ribs with Yukon Gold Mashed Potatoes and Balsamic Grilled Asparagus

SALAD CHOICES

SPRING MIX SALAD WITH HOUSE DRESSING

CAESAR SALAD WITH PARMESAN CROUTONS

SPINACH SALAD WITH WALNUTS, STRAWBERRIES, AND MANDARIN ORANGES

DESSERT CHOICES

ASSORTED CHEESECAKES

CARROT OR RED VELVET CAKE

APPLE, KEY LIME, OR PECAN PIE



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SAVOR...
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ARENA & EVENTS CENTER

LUNCH & DINNER BUFFETS

All buffets come with Rolls, Butter, and Ice Water. Prices based on 90 minutes of service with a 25 guest minimum. Priced per person.

BEVERAGES (choose TWO)

SWEET & UNSWEET TEA

REGULAR & DECAF COFFEE

LEMONADE

FRUIT PUNCH

SALADS (choose ONE)

SPRING MIX SALAD

Tomato, Cucumber, Red Onion, and Croutons
Choice of Two Dressings: Ranch, Italian, French, Balsamic Vinaigrette, or Thousand Island

CLASSIC CAESAR SALAD

Crisp Romaine Lettuce with Parmesan Cheese and Caesar Dressing

SPINACH SALAD

Mandarin Oranges, Strawberries, Toasted Walnuts, and Raspberry Vinaigrette

CUCUMBER & RED ONION SALAD

Fresh Cucumbers with Tomatoes and Sliced Red Onion

BLT SALAD

Chilled Iceberg Lettuce with Bacon, Tomatoes, Red Onion, and Bleu Cheese Crumbles

ARUGULA SALAD

Poached Pears, Toasted Walnuts, Bleu Cheese Crumbles with a Tangy Balsamic Vinaigrette

VEGETABLES & STARCHES

(choose ONE)

GREEN BEANS WITH PEARL ONIONS & BACON

Green Beans with Sautéed Onions & Bacon

MASHED POTATOES

SCALLOPED POTATOES

Layered Potatoes with Cheese

MACARONI & CHEESE

Our Homemade Tender Macaroni with White Cheddar Cheese Sauce

WILD RICE PILAF

Mixed Rice Seasoned to Perfection

FRIED OKRA

Crispy Golden Brown

GARLIC CHEESE GRITS

Creamy Garlic Grits with Sharp Cheddar

GINGER-GARLIC CARROTS

Roasted Carrots Caramelized with Ginger & Garlic

BRAISED STEAMED CABBAGE

BROWN SUGAR BAKED BEANS

STEAMED BROCCOLI

Tender Broccoli with Fresh Garlic

RED BEANS & RICE

Classic New Orleans Style

GREEN BEAN CASSEROLE

Classic Thanksgiving Side

SEASONAL VEGETABLES

Seasonal Vegetables Fresh from the Market Steamed/Roasted

ROASTED RED SKIN POTATOES

Olive Oil & Seasonings

SWEET POTATO CASSEROLE

Sweet Potatoes Marshmallow Top

COLLARD GREENS

Cooked for Hours till Tender

ROASTED BRUSSEL SPROUTS

with Crispy Bacon

HONEY GLAZED CARROTS

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ENTRÉES

Lunch (11:00 am to 2:00 pm) • Dinner (3:00 pm)

Beef Entrées

- Classic Pot Roast in Au Jus
- Beef Tips Portobello with Egg Noodles and Portobello Mushroom Sauce
- Steak Kabobs with Mushrooms, Tomatoes, Onions, and Peppers
- Sliced Roasted Top Round Roasted with Natural Au Jus
- Meat Lasagna in a Creamy Tomato Sauce
- Stroganoff with Egg Noodles, Mushrooms, and Cream Sauce
- Country Style Meatloaf with Wild Mushroom Brown Gravy
- Ginger-Soy Flank Steak Marinated with Sautéed Peppers and Onions
- Pasta Bolognese in a Hearty Meat Sauce with Penne Pasta and Parmesan Cheese
- Chicken Fried Steak with White Pepper Gravy

Chicken Entrées

- Roasted Herb Chicken Breast Marinated & Roasted with Fresh Herbs
- Chicken Cordon Bleu Stuffed with Ham & Swiss Cheese
- Chicken Caprese with Tomatoes, Basil, and Mozzarella Cheese
- Pecan Crusted Grilled Chicken with Maple Syrup
- Chicken with Leeks with Creamy Leeks & Tomatoes
- Chicken Marsala Baked with Mushrooms & Marsala Wine
- Chicken Picatta Sautéed Chicken with Lemon-Butter Sauce
- Jerk Marinated Chicken
- Santa Fe Grilled Chicken with Black Beans, Roasted Corn, Red Peppers topped with Tortilla Chips
- Chicken Portobello with Egg Noodles & Portobello Mushroom Sauce
- Chicken Stir Fry Chicken Breast with Asian Vegetables & Basmati Rice
- BBQ Grilled Chicken in a Sweet & Savory Brown Sugar BBQ Sauce
- Chicken Parmesan Breaded & Fried Topped with Mozzarella and Homemade Marinara Sauce
- Grilled Chicken Alfredo in a Parmesan Cream Sauce with Penne Pasta
- Chicken Kabobs with Mushrooms, Tomatoes, Onions, and Peppers

Pork Entrées

- Grilled Pork Chops with Grilled Peaches and a Tangy BBQ Sauce
- Pork Tenderloin Medallions Topped with Wild Mushroom Ragout
- Pork BBQ Smoked on Premise with our Chef's Spices & Herbs
- Roasted Pork Loin with Caramelized Onions & Apple Cider Demi-Glaze
- Fried Pork Chop Golden Brown with White Pepper Gravy

Fish Entrées

- Stuffed Flounder served with Red Pepper Cream Sauce •
- Lemon Pepper Cod Baked with Basil Crump Topping
- Grilled Salmon Topped with Pineapple Chutney •
- Low Country Shrimp & Grits* Creamy Cheddar Grits with Andouille Sauce
- Fish & Chips Beer Battered Cod & Hand Cut Fried Potatoes
- Fried Catfish Dusted with Spicy Remoulade and Served with a Corn Medley

Vegetarian Entrées

- Vegetable Lasagna Baked in White Béchamel Sauce
- Pasta Primavera with Fresh Vegetables, Penne Pasta, and a Garlic-Parmesan Cream Sauce
- Eggplant Parmesan Breaded with Marinara & Mozzarella Cheese
- Rigatoni Pasta with Grilled Eggplant, Tomatoes, and Parmesan Cheese



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SAVOR...
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DESSERTS (choose ONE)

ASSORTED CHEESECAKES

Regular, Raspberry Swirl, Chocolate, and Chocolate Swirl

PECAN PIE

with Bourbon Sauce

STRAWBERRY SHORTCAKE

Pound Cake with Macerated Strawberries

RED VELVET CAKE

A Southern Favorite with Frosting

PEACH COBBLER

Crispy Topping with Georgia Peaches

MIXED BERRY COBBLER

with Raspberries & Blackberries

TIRAMISU

with Mocha Mousse

APPLE PIE

with Cinnamon-Brown Sugar Apples

KEY LIME PIE

A Classic Florida Dish

CARROT CAKE

with Cream Cheese Frosting

VANILLA BEAN ICE CREAM

Great with Wedding Cake!

APPLE COBBLER

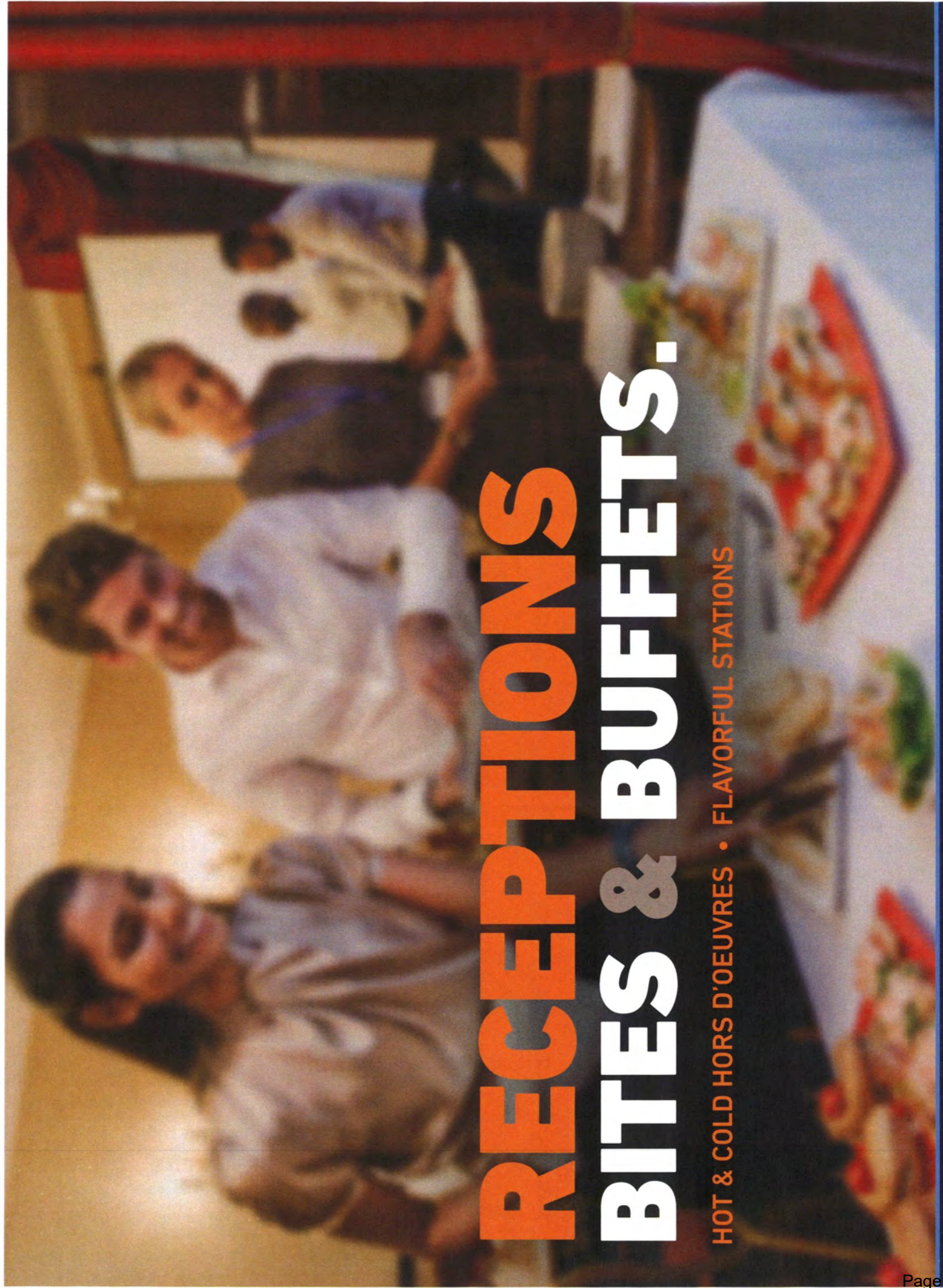
with Tender Apples & Spices

ITALIAN CANNOLI

with Italian Cream

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SAVOR...
CABARRUS
ARENA & EVENTS CENTER



RECEPTIONS BITES & BUFFETS.

HOT & COLD HORS D'OEUVRES • FLAVORFUL STATIONS



RECEPTIONS.

HOT & COLD HORS D'OEUVRES

Below serves 100 guests.

VEGETABLE CRUDITÉS

Seasonal Vegetables with Ranch Sauce

FRESH FRUIT DISPLAY

Assorted Fresh Seasonal Fruit

CHEESE BOARD

Cheddar, Pepper Jack, & Swiss with Water Crackers

IMPORTED CHEESE BOARD

Cheese Board with Gouda, Brie, and Boursin.

TOMATO BRUSCHETTA

French Bread with Tomatoes, Basil, Herbs, & Olive Oil

PETITE QUICHE

Miniature quiches makes this a great option!

SMOKED CHICKEN QUESADILLAS

Miniature Quesadillas with Vegetables & Chicken

MEATBALLS

Swedish, Sweet & Sour, BBQ, or Marinara

PULLED PORK OR MEATBALL SLIDERS

Served on Mini Buns

BUFFALO CHICKEN SKEWERS

Brushed with Hot Sauce, Served with Cucumber Dip

FRIED MOZZARELLA STICKS

With Fired Roasted Marinara

CHICKEN TENDERS

Served with Ranch, Honey Mustard, and BBQ Sauces

CRAB STUFFED MUSHROOMS

Stuffed with Blend of Crab Meat & Spices

SCALLOPS WRAPPED IN BACON

Tender Scallops Wrapped in Bacon

BEEF OR CHICKEN SATE

Glazed with a Light Teriyaki Sauce on Skewers

SHRIMP COCKTAIL

Poached Shrimp with Cocktail Sauce

COCONUT SHRIMP

Breaded Shrimp with Piña Colada Sauce

CRAB WONTONS

Stuffed Wontons Fried with Crab

DEVILED EGGS

Classic Egg Yolk Cream

**If you do not see an Hor D'Oeuvre above that you want, please ask your Food & Beverage Manager*

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SAVOR...
CABARRUS
ARENA & EVENTS CENTER



A LA CART ITEMS

ASSORTED MINTS

Our Assortment of Deluxe Mints

ASSORTED MIXED NUTS

Almonds, Cashews, Peanuts, and Pecans

FRESH BAKED COOKIES

White Chocolate, Oatmeal Raisin, Peanut Butter, or Chocolate Chip

WARM BAKED BROWNIES

With a White Chocolate Drizzle

CHEF ATTENDED STATIONS

(LUNCH/DINNER)

PASTA STATION

(Choose 2) Penne, Rigatoni, Bow Tie, Linguini, and Fettuccini

(Choose 2) Marinara, Alfredo, Rose Sauce,odka/Tomato, Fresh Pesto

(Choose 2) Sirloin Beef Tip, Italian Sausage, Grilled Chicken Breast, NC Caught Shrimp

Served with Broccoli, Squash, Zucchini, Cherry Tomato, Bell Pepper, Red Onion, Roasted Garlic

SHRIMP AND GRITS

NC Caught Shrimp, Stone Ground Grits, Andouille Sausage, Roasted Garlic, Red Eye Gravy, Green Onion

STREET TACO STATION

(Choose 2) Grilled Breast of Chicken, Grilled Skirt Steak, Pork Carnita, Blackened Mahi Mahi, NC Caught Shrimp, Roasted Vegetable

Served with an Assortment of Hard and Soft Corn Tortilla, Fresh Pico De Gallo, Cilantro, Diced Onion, Jalapeño Pepper, Bell Pepper, Avocado, Warm Queso Cheese, Shredded Cheddar Cheese

BAKED POTATO BAR

(Choose 2) Russet Potato, Sweet Potato, Au Gratin Potato, Yukon Gold Mashed Potato

Served with Sour Cream, Cheddar Cheese, Applewood Smoked Bacon, Whipped Butter, Green Onion, Broccoli, Brown Sugar, Mini Marshmallow

CARVING STATIONS

SLOW ROASTED PRIME RIB OF BEEF

Au Jus, Horseradish Cream, Whole Grain Mustard, Fresh Baked French Roll

HERB ROASTED PORK LOIN

Georgia Peach BBQ Sauce, Whole Grain Mustard, Caramelized Apples, Fresh Baked French Roll

SMOKED TURKEY BREAST

Cranberry Compote, Savory Herb Gravy, Fresh Baked French Roll

HONEY & BROWN SUGAR VIRGINIA HAM

Whole Grain Mustard, Fresh Baked French Roll

ROASTED TENDERLOIN OF BEEF

Wild Mushroom Demi-Glace, Horseradish Cream, Fresh Baked French Roll



SAVOR...
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ARENA & EVENTS CENTER

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BEVERAGES BARS & REFRESHMENTS.

WINE & BEER • LIQUOR • REFRESHMENTS • BAR PACKAGES



BEVERAGES & LIQUOR

BAR PACKAGES

Hosted Bar Packages will include all mixers. Bar Packages are subject to a 21% Administrative Charge and applicable taxes. Bar Packages will incur a Bartender Fee per 100 guests. Bar Service extending over three hours will incur an additional fee per bartender. Priced per person.

CORDIALS, LIQUEURS & MIXED DRINKS

Priced per glass.

Absolut Vodka, Bacardi Light Rum, Captain Morgan, Tanqueray Gin, Jose Cuervo Tequila, Crown Royal, Jack Daniels, Jim Beam, Johnnie Walker Red, Seagram's 7, Southern Comfort, E&J Brandy, Disaronno, Malibu, Midori, Peach Schnapps, Chambord

WINE

Priced per glass.

Josh Cellars Chardonnay & Cabernet, Biltmore White Zinfandel, KRIS Pinot Grigio, J. Lohr Estates Los Osos Merlot

BOTTLED & CANNED BEER

Priced per glass.

Budweiser, Bud Light, Miller Light, Coors Light, Stella Artois, Yuengling

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SAVOR...
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HOSTED BAR PACKAGES

The host pays for all drinks per the final number of guests. There is a minimum cost for all bars for the bartender fee. There is a \$1 per guest charge after 100 guests.

LIMITED HOSTED BAR

Bottled & Canned Beer
Wine (House Pour)
Pepsi & Diet Pepsi

HOSTED BAR

Cordials & Liqueurs Mixed Drinks
Bottled & Canned Beer
Wine (House Pour)
Pepsi & Diet Pepsi
Mixers include: Orange Juice, Cranberry Juice,
Pepsi, Diet Pepsi, Sierra Mist, Tonic Water,
Ginger Ale, Club Soda, Sour Mix, & Margarita Mix

HOT BEVERAGES

Fresh Brewed Coffee (Decaffeinated/Regular)
Hot Tea & Cocoa Assortment

COLD BEVERAGES

Iced Tea (includes sweetener & lemon)
Lemonade or Fruit Punch

INDIVIDUAL SERVINGS

Milk (Whole/Non Fat/Low Fat/Chocolate/Soy)
Assorted Soft Drinks, Bottled Water or
Fruit Juices (Pepsi, Diet Pepsi, Sierra Mist,
Mt. Dew, Aquafina Water
Water Service for Meetings

WINES BY THE BOTTLE

TIER I

Woodbridge by Robert Mondavi White Zinfandel
Woodbridge by Robert Mondavi Chardonnay
Woodbridge by Robert Mondavi Pinot Grigio
Woodbridge by Robert Mondavi Merlot
Woodbridge by Robert Mondavi Cabernet
Woodbridge by Robert Mondavi Pinot Noir
Cooks Extra Dry Champagne

TIER II

Robert Mondavi Private Selection Chardonnay
Robert Mondavi Private Selection Merlot
Robert Mondavi Private Selection Pinot Grigio
Robert Mondavi Private Selection Cabernet
Robert Mondavi Private Selection Sauvignon Blanc

TIER III

Toasted Head Chardonnay
Nobilo Sauvignon Blanc
Blackstone Merlot
Ravenswood Cabernet

TIER IV

Clos du Bois Chardonnay
Estancia Pinot Grigio
Clos du Bois Sauvignon Blanc
Clos do Bois Merlot
Estancia Cabernet

RESERVED

Robert Mondavi "Carneros" Pinot Noir
Estancia Meritage Blend
Inniskillin "Pearl" Vidal Ice Wine
Ravenswood Teldeschi Zinfandel
Robert Mondavi "Reserve" Cabernet
Blackstone "Sonoma Reserve" Merlot
Robert Mondavi "Napa" Cabernet

*Please note that the above
wines are our recommendations.
We are more than happy to
assist you in getting your own
special wine for your event.*

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ARENA & EVENTS CENTER

GENERAL INFORMATION.

Thank you for considering **Cabarrus Arena & Events Center** for your food and beverage needs. Food and Beverage services within the facility are provided exclusively by SAVOR... Cabarrus Catering by ASM Global. As such, no food and beverages may be brought into the facility without written approval of the Food & Beverage Manager. We are committed to providing the finest possible guest experience and look forward to working with you.

GUARANTEES AND PAYMENT

The guaranteed number of attendance is required fourteen business days prior to the date of your function. A business day is defined as Monday-Friday. If the guarantee is not received as stated, the number specified on the contract will be your guarantee. The guarantee is not subject to reductions within 72-hours before the start of the event. Increases in the guarantee up to 5% may be accepted after the final guarantee is given, however, additional charges may apply. The catering department will make every attempt to provide the identical menu based on availability of product. The catering department will prepare additional meals for seated functions 5% over the final guarantee up to a maximum of 25 meals, this includes vegetarian and special dietary meals.

Final payment for food and beverage services are due fourteen business days prior to the event date. Any onsite adjustments will be reflected in a final invoice payable within 10 days of event date. All catered functions are subject to service charges of 20% and a North Carolina sales tax.

CANCELLATIONS

Cancellation of contracted service must be made in writing to the Food & Beverage Manager or Event Coordinator. Deposits are non-refundable. Should special circumstances require you to reschedule your event, we will review specific accommodation options on a case-by-case basis. Any event cancelled less than 3 business days prior to the event will incur 100% of the estimated charges.

ALCOHOLIC BEVERAGE SERVICE

We offer complete selection of beverages to complement your function. The North Carolina Alcohol and Beverage Commission regulates alcoholic beverage service. Cabarrus Arena & Events Center is responsible for the administration of these regulations. Alcoholic beverages may not be brought onto the premises from outside sources without the written consent of the Food & Beverage Manager, nor may they be removed from the premise. All alcoholic beverages must be dispensed by an employee of Cabarrus Arena & Events Center. In compliance with the NCABC regulations we reserve the right to ask patrons for proper identification for alcoholic beverage service and we will refuse service to underage or intoxicated persons. Alcoholic beverages will not be served past 11:00p and will be cleared one hour before event's end. There will be a bartender fee of \$150.00 per 100 guests. All bars that extend past 11:00p, will be subject to an additional \$100.00 bartender fee for each additional hour of service.

FACILITY SERVICES

Round table seating for 8 people will be provided unless otherwise specified. Seating diagrams with numbered tables are available upon request. If your event grows to more than 300 guests, we may need to obtain items which exceed our existing inventory. Any fees to do so will be charged to you at our cost. All tables for meal functions are topped with our house linens. All buffets are self-serve and all meals have a self-serve drink station.

SAVOR...
CABARRUS
ARENA & EVENTS CENTER

ADDITIONAL LINEN

All tables where food and/ or beverage are served or displayed will have full linen at no additional cost to the client. Only the area(s) not pertaining to food and beverage service will be charged additional fees. Examples of these areas include registration/gift tables, vendor booths, DJ photography, etc.

DECORATIONS AND FLORALS

The following decorations are prohibited by Cabarrus Arena & Events Center: freestanding candles, pyrotechnics, confetti, metallic confetti, rice, sand, marbles, glitter, rose/flower petals, loose candies/objects, and helium balloons. There is a Food & Beverage charge of \$10.00 per table for cleanup of each table will be added into the final event settlement for the use of the prohibited items.

MENU

In creating our banquet menus we have attempted to offer a variety of traditional and contemporary flavors with dynamic presentations. We also welcome the opportunity to create a specialized menu unique for your specific event. Due to seasonal fluctuations and acts of nature that may affect quality and availability of products, Cabarrus Arena & Events Center reserves the right to adjust pricing or substitute menu items to compensate for such changes. All food and beverage services are scheduled for two hours unless otherwise noted; however, they may be extended at an additional charge. For plated service, you must provide us with a method of identifying each guest's menu choice such as tickets, place cards, stickers, etc.

EXCESS PREPARED FOOD

Excess prepared food is donated, under regulated conditions, to local agencies feeding the underprivileged. For health and safety reasons, food and beverage may not be taken off premise.show/function.

ALLERGIES

SAVOR... facilities are not certified Gluten Free or Vegan. We cannot guarantee that cross contact with allergens will not occur and cannot assume any responsibility or liability for a person's sensitivity or allergy to any food item provided in our facility.



ALL THE AFOREMENTIONED POLICIES WILL BE STRICTLY ADMINISTERED. ANY VIOLATION OF THESE WILL RESULT IN THE REMOVAL OF PRODUCT FROM THE SHOW FLOOR

SAVOR...
CABARRUS
ARENA & EVENTS CENTER



For more information, please contact our
Food & Beverage Manager
at (704) 920-3880

SAVOR...



Monthly Report of Operations June 2019

Submitted: July 23, 2019

Prepared By: Kelvin D. Moore, CMP, Regional General Manager

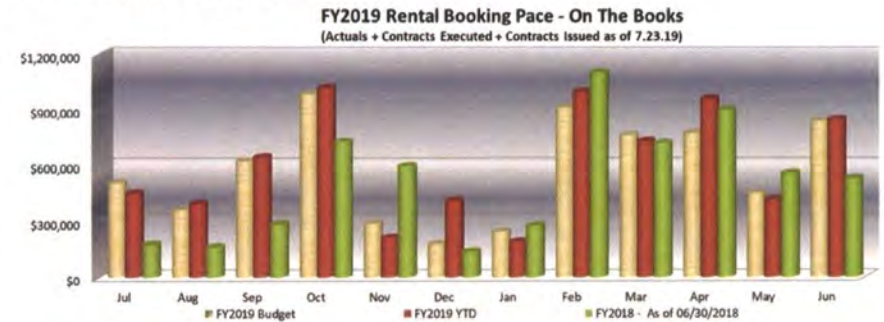
SUMMARY

Financial Snapshot
Sales
Event Highlights
Information Technology
Facilities & Maintenance
Public Relations
Customer Satisfaction
Event Production
Public Safety
Diversity & Inclusion
Human Resources
Food & Beverage

	Actual	Budget	Variance	Actual	Budget	Variance
Event Income						
License Fees	\$ 837,827	\$ 838,066	\$ (240)	\$ 7,162,116	\$ 6,921,726	\$ 240,390
Ancillary Income	\$ 4,067,049	\$ 3,207,573	\$ 859,476	\$ 27,320,789	\$ 21,505,966	\$ 5,814,823
Ancillary Expense	\$ (2,419,365)	\$ (2,012,476)	\$ (406,889)	\$ (18,719,002)	\$ (14,192,580)	\$ (4,526,422)
Net Ancillary Income	\$ 1,647,684	\$ 1,195,097	\$ 452,587	\$ 8,601,788	\$ 7,313,386	\$ 1,288,402
Ancillary Margin	41%	37%		31%	34%	
Total Event Income	\$ 2,485,510	\$ 2,033,163	\$ 452,347	\$ 15,763,904	\$ 14,235,112	\$ 1,528,792
Other Income	\$ 27,837	\$ 46,748	\$ (18,911)	\$ 489,517	\$ 558,826	\$ (69,309)
Total Income	\$ 2,513,348	\$ 2,079,911	\$ 433,437	\$ 16,253,421	\$ 14,793,938	\$ 1,459,483
Expenses						
Indirect Expenses						
Salaries & Benefits	\$ 949,563	\$ 800,491	\$ 149,072	\$ 10,248,926	\$ 10,239,372	\$ 9,554
Other Indirect Expenses	\$ 1,287,837	\$ 1,266,441	\$ 21,396	\$ 15,392,103	\$ 15,120,128	\$ 271,975
Total Indirect Expenses	\$ 2,237,400	\$ 2,066,932	\$ 170,468	\$ 25,641,029	\$ 25,359,500	\$ 281,529
Net Income/(Loss)	\$ 275,948	\$ 12,979	\$ 262,969	\$ (9,387,608)	\$ (10,565,562)	\$ 1,177,954

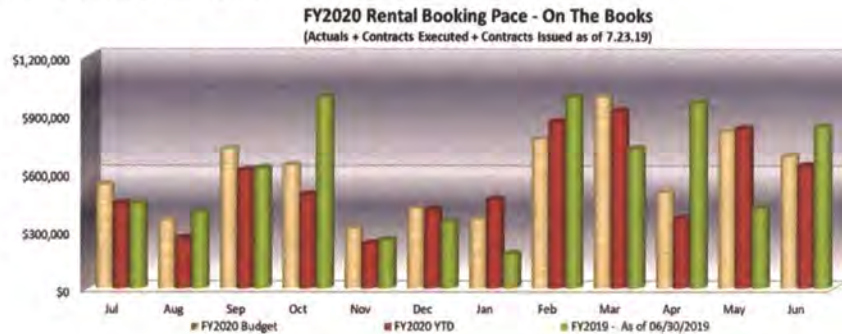
2. Sales

Rental Booking Pace – FY19 Final



- **\$7.3 Million** in License Fees (Rental Revenue) "On the Books"
- **105% of budget** (\$6.9M)

▪ Rental Booking Pace – FY20



- \$6.5 Million in License Fees (Rental Revenue) "On the Books"
- 92% of budget (\$7.1M)
- \$2.96M Contracted (42%)
- \$3.54M Definite (50%)

▪ Sales Activity

- Issued Contracts for 2 short-term events actualizing in rental revenue of \$1,088.
- 1 Meeting; 1 Conference
- Of the 2 events, 1 is new and 1 is retention

▪ June 2019 Contracts

Group - Event Name	Month-Year	Revenue	Comments
Phila Tribune	Sep-19	\$ -	Food & Beverage
NContracts	Aug-19	\$ 1,088.00	
Total		\$ 1,088.00	

- Issued contracts for 2 long term accounts actualizing in total revenue of \$167,807.
- 1 Conference with Tradeshow1, 1 Public Show
- Of the events, both are retention clients

▪ PHLCVB June 2019 Contracts

Group - Event Name	Month-Year	Revenue
Heart Failure Society of America	Sep-19	\$50,937.98
Keystone Comic Con	Aug-19	\$116,869.00
Total:		\$167,806.98

▪ June 2019 Lost Business

Group - Event Name	Status	Mo-Yr	Revenue	Reason
Kappa Alpha Psi HBCU Fundraiser (ICW)	Tentative	Aug-19	\$ 10,183	Labor Costs/Concerns

Independence Mission Schools Professional Development Staff training	Tentative	Aug-19	\$ 32,277	Chose an Alternate Venue
Philadelphia FIGHT Opioid Symposium	Tentative	Sep-19	\$ 3,810	Funding
Philadelphia FIGHT Opioid Symposium	Tentative	Oct-19	\$ 3,810	Funding
Pharma Future Digital Council Symposium	Tentative	Oct-19	\$ 18,421	Preferred Dates Not Available
Phenom People	Tentative	Jun-20	\$ 14,608	Chose an Alternate Venue
Total:			\$93,109	

▪ June 2019 Trade Shows & Sales Calls

	Trade Shows	Sales Calls
Chris	0	40
Linda	1	10
Russell	3	4

3. Event Highlights

▪ June - July Event Highlights

- **International Society for Technology in Education (6/23 – 6/26)**
17,000 Attendees 502 Exhibitors
Returning event from 2011 and 2015. A tech heavy show for educators.
- **Netroots Nation (7/11 – 7/14)**
3,900 Attendees
Labor-friendly organization, first time at convention center. Democratic Presidential Candidate Forum was conducted. Record attendance.
- **Halo Outpost Discovery (7/19 – 7/21)**
15,000 Attendees 120 Exhibitors
Halo Outpost Discovery is a new touring fan experience for all ages that brings the Halo video game universe to life with themed attractions and interactive areas. Philadelphia was the second of a five-city tour.
- **Ongoing / Upcoming Event Highlights**
 - **Mazzoni Trans Conference (7/24-7/27)**
4,000 Attendees 114 Table Top Exhibits
Repeat group. Event has grown over 17 years here. They have max out of BSA and need to consider exhibit hall.
 - **Kappa Alpha Psi Fraternity (7/29 – 8/3)**
4,000 Attendees 160 Exhibitors
84th Grand Chapter Meeting and Conclave - National Event - Headquarters are located in Philadelphia - first time back in the convention center on a large scale since mid '90s. Various events around downtown Philadelphia, majority of all meeting room activities, general session, and induction dinner held at PCC.
 - **Keystone Comic Con (8/20 – 8/26)**
15,000 Attendees 225 Exhibitors
Second year at PCC. Reed Expo is event organizer.

4. Information Technology

- **Staff Computers/Laptops:**
 - No major issues were reported
- **Servers:**
 - HCI Migration of data from Old to New servers is still ongoing (waiting on EBMS to move to cloud).
- **Network Equipment:**
 - Issues reported during ISTE.
- **Wireless:**
 - Issues reported during ISTE.
- **Telephones:**
 - Continued work with Weidenhammer/Comcast to upgrade our redundancy for phone systems.
 - Dates were chosen in August for changeover to SIP Trunking
 - New phones arrived onsite for July/August installation
- **Cell Phones:**
 - No major issues were reported
- **Security Systems:**
 - Briefcam Server installation scheduled for Mid-July to August
- **Television/Digital Signage:**
 - Info received from Daktronics for new Digital Media Players using show control.
- **Cabling Infrastructure:**
 - Tricomm and LanConnect continuing work on fiber projects.
- **Staff Changes**
 - N/A

5. Facilities & Maintenance

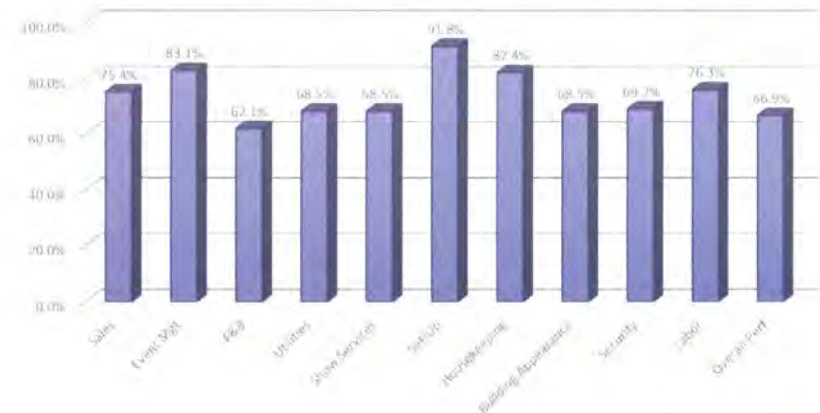
- **Facilities**
 - Elevator 3 year load testing was completed for Elevators 19, 20, 22, 23 on June 4th.
 - Escalator 3 & 4 steps were cleaned by an outside contractor utilizing the Juma Step 100 escalator cleaner.
 - Dude Solutions had a onsite meeting with SMG Corporate Operations and PACC Staff on June 19th. The PACC is working with SMG Corporate Operations to test the energy module software.
- **Safety**
 - Developed a Pest Control Action Plan with Tri County Pest Control and Elliott Lewis for patching and firestopping not sealed during previous construction and renovations. Building voids around doors, walls, appliances and pipe, conduit and duct chases have been identified to remediate.
- **Sustainability**
 - A Sustainability Training powerpoint was drafted for the upcoming summer training.
- **Energy Management**
 - June Electricity was up by 29% compared to last June due to City wide building events.
- **Contracts**
 - The Annual Roof Inspections and Maintenance vendor was selected. US Roofing will perform services subsequent to the contract execution. The work will take place in the Fall months.
 - PCCA renewals were finalized JCI Central Plant Year 5, Siemens HVAC Building Automation Year 5 and General Fire Equipment Fire Alarm Testing and Inspection Year 4.
- **ALTUM**
 - 350 PM Work Orders and 120 Non-PM Work orders were completed for June 2019.

6. Public Relations

- CSA Extension article in PBJ
 - https://www.bizjournals.com/philadelphia/news/2019/07/23/pennsylvania-convention-center-to-extend-expand.html?iana=hpmvp_phil_news_headline
- **Social Media**
 - **Facebook:**
 - 107 new page followers; 13,528 total
 - **Twitter**
 - 25 new followers; 5,085 total
 - **Instagram**
 - 38 new followers; 1,001 total

7. Customer Satisfaction

Customer Survey Average Score July 2018 - June 2019



Ratings Scale				
Far Exceeded 100%	Exceeded 80 %	Met 60%	Met Most 40%	Did Not Meet 20%

Survey Highlights

- **Average Rating: 74%**
- **Response Rate YTD: 21.4% (36 of 182)**
- **Service Successes:**
 - Guests consistently comment on staff helpfulness, pleasant attitudes and demeanors as well as team members making sure expectations are met and in general are "great to work with"
 - First-time and repeat customers made note of the flexibility and solution-based service provided by team members
 - Repeat customers reported it was comforting to them to see and work with familiar faces that were accustomed to their events

– **Service Challenges:**

- General comments regarding the taste and quality of F&B offerings and service delivery missteps
- IT connectivity issues reported on a few large events (BIO, ISTE)
- Simplified clarification requested for building rules and regulations
- Continued concern about the level of security surrounding the building and steps being taken to control the homeless population. Customers are concerned for the safety of their staff and attendees and repeat customers note a decline in the appearance of the building perimeter over past years
- We continue to explore opportunities to increase the survey response rate as well as research methods to assess attendee satisfaction in the Center in an effort to better understand the overall guest experience.

8. Event Production

• **Revenue Summary**

- IT & Telecom billing
 - \$843k (before service recovery for BIO & ISTE)
- AV Services Equipment billing
 - \$66k
- Rigging Services Revenue Summary
 - \$193k
- Advertising & Sponsorship
 - \$8k

• **Contractor Services**

- Pre-cons and Planning Meetings
 - Pack Expo Planning Meeting 7/23
 - Kappa Alpha Pre-con 7/27
- Education/Safety
 - Safety Committee Meeting 7/17

9. Public Safety

• **VIP VISIT - SECURITY**

- 6/4/19 - The SMG Security Staff assisted with visit of Pennsylvania Governor Tom Wolf during his appearance at the 2019 Bio International Convention at the PCCA.

• **SECURITY TRAINING – ALLIED UNIVERSAL SECURITY OFFICERS**

- 6/6/19 - All PCCA Allied Universal security officers received a brief safety training topic regarding 'Stairs, Steps and Escalator Safety'. The training was conducted by Allied Universal Shift supervisors.

• **SECURITY TRAINING**

- 6/18/19 - The SMG / PCCA Director of Public Safety Anthony Rapone attended a full day Cyber Security Seminar at Citizens Bank Park. The session was conducted by FBI Special Agent Michael Harpster and the Executive V.P. of Sony Pictures Entertainment Security advisor Stevan Bernard.

10. Diversity & Inclusion

• **Event Interaction**

- Diversity has worked along with our Events Management team to educate our staff and serve as a resource to our clients.

• **Outreach**

- Hosting a "Doing Business with the PA Convention Center" event on Tuesday August 6, 2019. We have 191 registered attendees.
- We recorded and ad that will be distributed on our social media platforms.

• **Spend Tracking**

- Procurement and Diversity are preparing a recommendation for software for a more effective way to track our spend.
- Compliance and Diversity have reached out to our current contractors and they are filling out our Diversity Compliance Report with a due date of July 15th. As of the due date we received nearly 50% of the forms and sent reminders to the rest.

• **PHL Diversity and PA Convention Center**

- Researching the possibility of awarding a Convention Center specific award during the PHL CVB Business Opportunity Lunch (February 2020). Advising on the 2020 Diversity Conference.

11. Human Resources

• **Open Positions**

- Sales Manager – currently reviewing resumes
- Senior Communications Manager – 2 finalists scheduled for 2nd interviews.
- HSK Operations Setup Manager – In person interviews have been scheduled.
- Executive Assistant – In person interviews have been scheduled.
- Systems Administrator – Benjamin Lembo was hired on July 1st.

12. Food & Beverage

• **Finance - Commission Update**

- Forecasted Commission: \$595,083
- Actual Commission: \$817,856
- Variance: \$222,773

• **Events Review**

– **2019 Bio International Convention 6/3-6/19**

Show Management was great to work with. Started planning 9 months in advance. Tasting held in February for Exhibitor Hospitality Reception (1200 ppl with the rest of the food and bars supplemented by exhibitors) and boxed lunches -6,000 per day for 2 days and 3500 on last day. Overall operation and execution of show was a success. We received many compliments at the Post-Con Meeting. A lot of exhibitor orders, which overall were executed nicely.

– **APIC 2019 6/12/19**

New client to the PACC. Client was unhappy on day 1 of the event with long lines (hour wait) at the concessions stands for the voucher bundle meals. Aramark corrected for the next day and turn it into a catering event with added speed lines, boxed lunches (1000 at no charge to the client on both day 2 and day 3) and no collection of vouchers for the remaining days. ICW events went very well despite client's arriving very early onsite and being very demanding for missing items from the building. Show had 19 ICWs for symposia. Each event was a different customer.

– **Wizard World Comic Con 6/13-16/19**

Return client. Large concessions show. Occupied fewer halls than their last event. As a consequence, sales weren't as strong as previous years. Ran very smooth operationally. Client was very happy.

– **International Society of Technology in Education 6/23-29/19**

Return client. New meeting planner from last conference. Increased number of exhibitor services from their previous conference. Large services in hall for attendees. Satellite concessions sales were not as strong as those in exhibit halls. Clients were very happy and said as much during "thank you" meeting.

▪ **Human Resources**

- Regional HR Meeting
- Regional recruitment event
- RAMP Certification Training
- New Hire Orientations
- Onboarding (Terry Rulli/Catering Manager, Sean Muldoon/Concessions Supervisor)
- New staffing SOP

▪ **Operational Updates**

- Equipment, layout, and design concepts submitted to Steve Shepper for concession upgrades
- Working with Steve Shepper on office space re-design in Overlook Café (ongoing)



ASM Global Report of Operations

Event Highlights

Customer Satisfaction

Labor Hospitality Training

Staff Spotlight



Event Highlights



ALA Midwinter Meetings
January 24-29
13,000 Attendees
281 Exhibitors



American Handcrafted Philadelphia
January 25-27
5,000 Attendees
322 Exhibitors



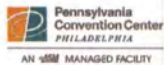
Philadelphia Intl. Auto Show 2020
February 8-17
244,912 attendees



PINK Unite for Her
February 21-23
10,000 Attendees
20 Exhibitors



Philadelphia Flower Show
February 29-March 8
300,000 Attendees
390 Exhibitors



AN ASM MANAGED FACILITY

Event Highlights: Upcoming



American Academy of Allergy, Asthma & Immunology (AAAAI)
March 14-17
6,500 Attendees
242 Exhibitors



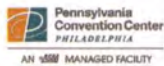
PACK EXPO EAST 2020
March 3-7
5,000 Attendees
390 Exhibitors



Higher Education Users Group (HEUG)
March 26-April 1
3,200 Attendees
76 Exhibitors

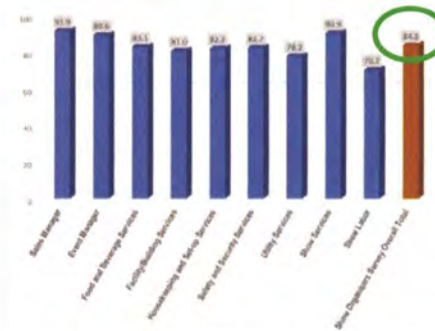


American Chemical Society
March 23-25
15,000 attendees
222 Exhibitors



AN ASM MANAGED FACILITY

Customer Satisfaction



- ✓ **84.3%** - Overall Satisfaction Rating
- ✓ **42.2%** - Response Rate

Customer Satisfaction Scale				
Excellent 100%	Very Good 80%	Good 60%	Fair 40%	Poor 20%



AN ASM MANAGED FACILITY

Labor Hospitality Training



- ✓ Partnered with Freeman
- ✓ 80 members over two 4-hour sessions
- ✓ "The key component is the people. People will make the difference."
- ✓ "It was apparent to us there is a tremendous sense of pride among the trades to continually improve in this category of customer service and its importance to the marketplace." - Mike McGuire, Freeman AGM

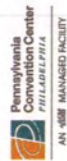


AN ASM MANAGED FACILITY

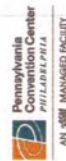
Staff Spotlight



Mary Ann Torres achieved her CMM (Certification in Meeting Management)



Thank You!



ASM TULSA ANNUAL REPORT 2022



EXECUTIVE SUMMARY

In the year since re-opening after the COVID-19 shutdown, ASM Global's two Tulsa properties, BOK Center and Cox Business Convention Center surpassed two venue records, signed multi-year contracts, and continue to be recognized for excellence in the industry. When COVID-19 shut down live entertainment, ASM Global quickly mobilized to develop systems and protocols to reopen safely.

We saw a drastic change in the live entertainment industry - concerts, conventions, and countless other live events were canceled or postponed with no idea of when they would be able to start again. It was a really devastating time for the industry. At ASM Global, we had to think creatively and act quickly to implement new procedures to keep going. I am very proud of our success and recovery in the last year.

Since reopening, ASM Tulsa has broken three venue records: BOK Center hosted ten events in 13 days and hosted its all-time highest grossing concert in venue history, and Cox Business Convention Center hosted five events in a single day, the most in venue history.

Both Cox Business Convention Center and BOK Center continue to punch above their weight nationally, landing conventions and live entertainment acts that parallel New York City, Los Angeles and other larger venue locations. The accolades continue to flow in - from industry experts and local fans alike - with Cox Business Convention Center earning both the Convention South's Reader's Choice Awards for the 8th year and Exhibitor Magazine Center of Excellence for the third time. And BOK Center was nominated by both Pollstar and the Academy of Country Music for the Arena of the Year Award, which marks the 9th nomination for both awards in building history.

We are so fortunate to have a community that supports our venues not just by purchasing tickets, but also through sponsorships, premium seating licenses and season ticket commitments for sports tenants. Our ASM Tulsa team is committed to its mission of being industry leaders serving our community and we relentlessly pursue outrageously excellent experiences for our clients, guests, and employees. ASM Global will continue to make Tulsa a destination for the best in live entertainment from concerts, sporting events, conventions & exhibitions, and family friendly entertainment.



Bryan Crowe
Vice President & General Manager



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WE ARE ASM TULSA

MISSION STATEMENT

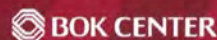
ASM Tulsa is comprised of BOK Center & Cox Business Convention Center.

At ASM Tulsa, it's our mission to be outrageously excellent.

We embrace our differences and leverage them to create an amazing workplace. We're a diverse family of team members who are passionate about serving our community and we pride ourselves on creating superior experiences for our clients and guests. We strive to maintain a work community based on mutual respect and support which values everyone's dignity, abilities, and unique contributions. At BOK Center and Cox Business Convention Center, we support a company culture in which a mix of people can come to work, feel comfortable and confident to be themselves, and work in a way that suits them and is able to deliver on business objectives. Our hope is that our venues will become your home away from home so that you look forward to work each day.

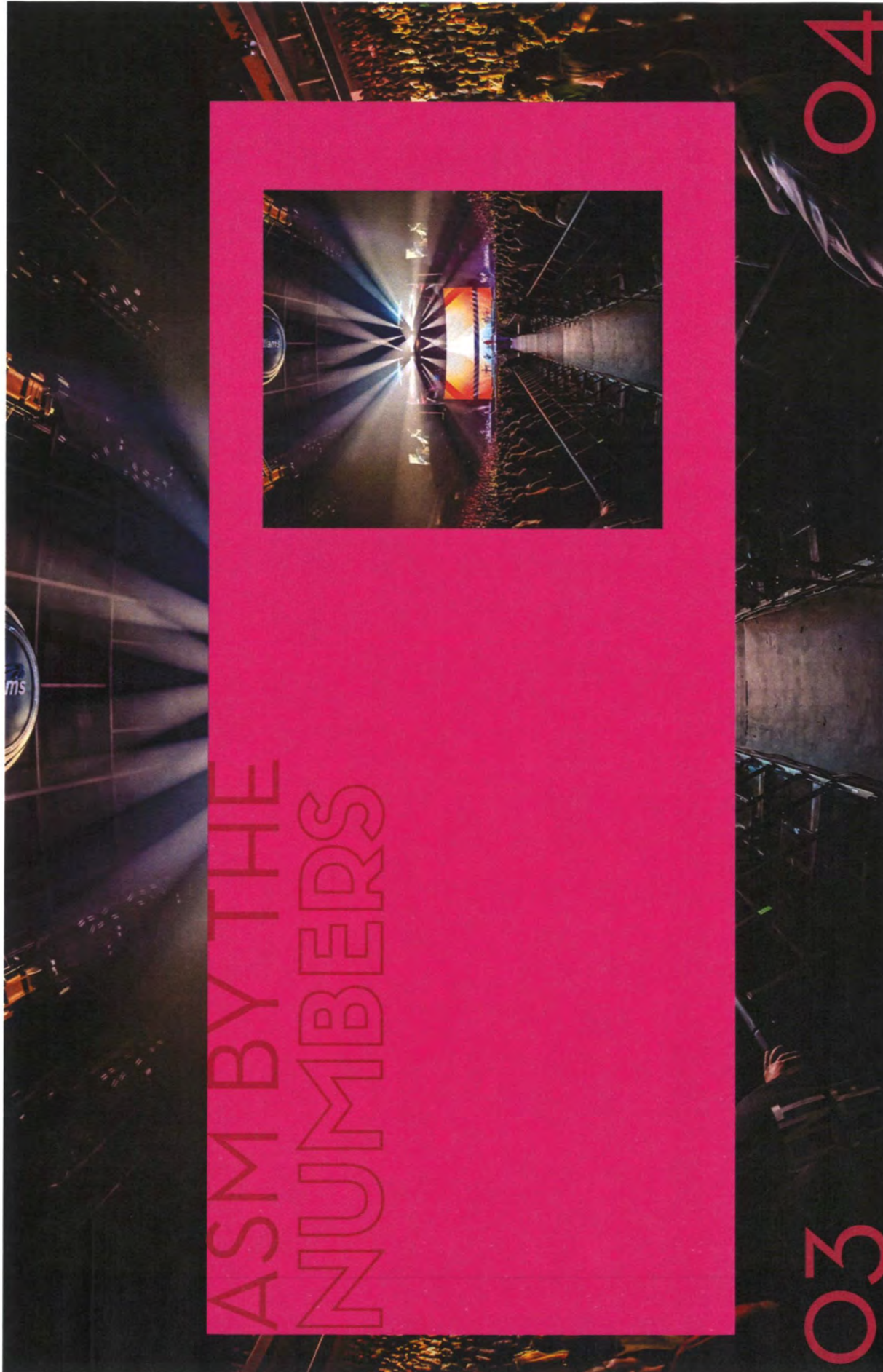
PROUDLY MANAGED BY ASM GLOBAL

ASM Global is the world's leading producer of entertainment experiences. It is the global leader in venue and event strategy and management—delivering locally tailored solutions and cutting-edge technologies to achieve maximum results for venue owners. The company's elite venue network spans five continents, with a portfolio of more than 325 of the world's most prestigious arenas, stadiums, convention, and exhibition centers, and performing arts venues.



2008 NEW CONCERT VENUE OF THE YEAR NOMINEE, FACILITY EXECUTIVE OF THE YEAR NOMINEE, HALL OF HEADLINES AWARD FOR TOP ARENA BOOKINGS, HALL OF HEADLINES NOMINATION FOR TOP ARENA MARKETING, 2009 2009 "VENUE OF THE YEAR" NOMINEE - ACADEMY OF COUNTRY MUSIC, 2009 "VENUE OF THE YEAR" NOMINEE - POLLSTAR, 2009 "VENUE OF THE YEAR" NOMINEE - IEBA, FACILITY EXECUTIVE OF THE YEAR, 2009 NOMINEE PRIME SITE AWARD - FACILITIES MAGAZINE, BEST VENUE IN CENTRAL HOCKEY LEAGUE, BEST LOCKER ROOMS IN CENTRAL HOCKEY LEAGUE, EXCELLENCE IN CONSTRUCTION AWARD, AIA EASTERN OK - MERIT AWARD HALL OF HEADLINES, NOMINATION FOR TOP ARENA BOOKINGS, HALL OF HEADLINES, NOMINATION FOR TOP ARENA MARKETING, #9 IN THE US FOR TICKET SALES - MID YEAR 2009 POLLSTAR, #8 IN THE US AND #20 IN THE WORLD FOR TICKET SALES, ABSOLUTE BEST OF TULSA - URBAN TULSA WEEKLY, 2010 #9 IN US, #24 IN WORLD FOR TICKET SALES - POLLSTAR MID-YEAR, MOVERS AND SHAKERS OF THE DECADE - TULSA WORLD BEST CONCERT VENUE - OK MAGAZINE, COMPUTERWORLD HONORS PROGRAM NOMINEE, FOR TECHNOLOGY OKLAHOMA MAGAZINE'S BEST CONCERT VENUE, SMC NAMES JERRY GOLDMAN REGIONAL BOOKING MANAGER, "VENUE OF THE YEAR" NOMINEE - POLLSTAR, "VENUE OF THE YEAR" NOMINEE ACADEMY OF COUNTRY MUSIC, #10 IN US AND #23 IN WORLD - POLLSTAR YEAR END 2011 2011 BOK OFFICE STARS - VENUES TODAY, TULSA CITY COUNCIL, SPECIAL PROCLAIMATION, #1 TOP STOP OF 2010 VENUES TODAY PRIME SITE AWARD, FACILITIES MAGAZINE IAVM VENUE EXCELLENCE AWARD WINNER IAVM JOHN BOLTON CHOSEN AS VICE CHAIR OKLAHOMA MAGAZINE, BEST LOCAL ICON & BEST CONCERT VENUE THE TULSA FOUNDATION FOR ARCHITECTURE LEADERSHIP AWARD, IEBA VENUE EXECUTIVE OF THE YEAR VENUES, TODAY HALL OF HEADLINES NOMINEE FOR BOOKINGS, TULSA BUSINESS JOURNAL MEN OF DISTINCTION TULSA YOUNG PROFESSIONALS - SOCIAL IGNITER AWARD, POLLSTAR MAGAZINE FACILITY EXECUTIVE OF THE YEAR WINNER, TULSA CONVENTION CENTER - SPORTSVENTS MAGAZINE READERS' CHOICE, 2011 "VENUE OF THE YEAR" NOMINEE - ACADEMY OF COUNTRY MUSIC, 2011 "VENUE OF THE YEAR" NOMINEE - POLLSTAR 2012 JERRY GOLDMAN - NAMED TO TULSA BUSINESS JOURNAL'S TOP 40 UNDER 40, JEFF NICKLER - NAMED TO OKLAHOMA MAGAZINE'S TOP 40 UNDER 40, VENUES TODAY GENERATION NEXT NOMINEES - JEFF NICKLER & PAIGE REESE, GENERATION NEXT READER'S CHOICE AWARD WINNER - JEFF NICKLER OKLAHOMA MAGAZINE'S BEST LOCAL ICON/LANDMARK, OKLAHOMA MAGAZINE'S BEST CONCERT VENUE, OKLAHOMA MAGAZINE'S BEST PLACE TO SEE AND BE SEEN, VENUES TODAY SOCIAL MEDIA POWER RANKING, #16 IN US, TULSA BUSINESS JOURNAL WOMEN OF INFLUENCE WINNER - JANET ROCKEFELLER, "VENUE OF THE YEAR" NOMINEE - ACADEMY OF COUNTRY MUSIC, 2012 "VENUE OF THE YEAR" NOMINEE 2013 VENUES TODAY HALL OF HEADLINE WINNERS BOOKING, JOHN BOLTON & JEFF NICKLER OKLAHOMA MAN OF THE YEAR, JOHN BOLTON, #3 RANKED VENUE IN THE US POLLSTAR, #3 HIGHEST CROSSING MIDWEST VENUE BY VENUES TODAY, "VENUE OF THE YEAR" NOMINEE - ACADEMY OF COUNTRY MUSIC, "VENUE OF THE YEAR" NOMINEE - POLLSTAR 2014 VENUES TODAY GENERATION NEXT NOMINEES - JOHN DODD & KELLY ORTIZ, #1 TOP STOP IN THE MIDWEST BY VENUES TODAY, "VENUE OF THE YEAR" NOMINEE - ACADEMY OF COUNTRY MUSIC, "VENUE OF THE YEAR" NOMINEE TIVE OF THE YEAR NOMINEE BY ROOKIE OF THE YEAR NOMINEE ENS, TULSA YOUNG PROFESSIONALS, "THE PEOPLE PEOPLE" - TODAY HALL OF HEADLINES LER, MICHAEL OWENS, JOHN LY ORTIZ & SARAH HAERTL, 2015 ATION NEXT WINNER - CASEY MAGAZINE'S BEST LIVE MUSIC MAGAZINE'S BEST EVENT CENTRINE'S BEST PERFORMING ARTS THE MIDWEST BY VENUES TODAY'S IDEA AT SMC MARKET EDUCATION AWARD, IAVM OWENS, NATHANIEL PORTER CONCERT VENUE OK MAGAZINE/LANDMARK "VENUE OF THE YEAR" - IEBA JEFF NICKLER - "VENUE OF THE YEAR" - IEBA JEFF NICKLER - "ROOKIE OF THE YEAR" NOMI WORLD "BEST IN THE WORLD" VENUE, VENUES TODAY HALL NATION - OPS & TECH - CASEY VENUES TODAY HALL OF HEAD - MARKETING, VENUES TODAY NOMINATION - BOOKINGS, VEN HEADLINES NOMINATION - INCLUSIVE WORKPLACE CULTURES - TULSA CHAMBER, POLLSTAR YEAR END, #26 IN THE UNITED STATES, VENUES TODAY YEAR END RANKINGS #28 IN THE WORLD, 2016 BEST LARGE MUSIC VENUE (WINNER), TULSA VOICE, BEST ALL-AGES MUSIC VENUE (FINALIST), TULSA VOICE, BEST EVENT CENTER, TULSA PEOPLE, BEST PERFORMING ARTS VENUE, TULSA PEOPLE, VENUES TODAY, #9 TOP STOP IN THE UNITED STATES & #13 TOP STOP IN THE WORLD, VENUES TODAY SOCIAL MEDIA POWER RANKINGS, #13 IN THE UNITED STATES & #20 IN THE WORLD, VENUES TODAY MID-YEAR RANKINGS, #20 IN THE UNITED STATES & #26 IN THE WORLD, POLLSTAR MID-YEAR, #13 IN THE UNITED STATES & #26 IN THE WORLD, TULSA WORLD "BEST IN THE WORLD" - LIVE ENTERTAINMENT VENUE, LARGE ARENA OF THE YEAR NOMINEE - IEBA JEFF NICKLER, VENUE EXECUTIVE OF THE YEAR NOMINEE - IEBA, ARENA OF THE YEAR WINNER - IEBA, ARENA OF THE YEAR NOMINEE - POLLSTAR, FACILITY EXECUTIVE OF THE YEAR NOMINEE, JEFF NICKLER - POLLSTAR, VENUES TODAY HALL OF HEADLINES 2016 NOMINATION - BOOKINGS, VENUES TODAY HALL OF HEADLINES 2016 WINNER - MARKETING - MEGHAN DOYLE, 2017 VENUES TODAY #3 TOP STOP IN MIDWEST (FEB 1, 2016 - JAN 31, 2017), VENUES TODAY GENERATION NEXT NOMINATION - EVAN FALAT, TULSA PEOPLE A-LIST WINNER, BEST VENUE/PERFORMING ARTS, TULSA PEOPLE A-LIST WINNER, BEST EVENT VENUE, TULSA PEOPLE A-LIST WINNER, BEST LIVE MUSIC VENUE, IAVM FOUNDATIONS 30 UNDER 30, ERIC SCHLICHTER, VENUES TODAY Q1 #8 TOP STOP (IN WORLD) #6 (IN US) (JAN 16 - FEB 15, 2017), VENUES TODAY MID-YEAR #14 TOP STOP (IN US) & #18 (IN WORLD) (OCT 16, 2016 - MAY 15, 2017), VENUES TODAY YEAR END #14 TOP STOP (IN US) & #19 (IN WORLD), VENUES TODAY SOCIAL MEDIA POWER RANKINGS (MAY), #19 IN THE UNITED STATES & #14 IN THE WORLD, VENUES TODAY SOCIAL MEDIA POWER RANKINGS (AUGUST), #14 IN THE UNITED STATES & #18 IN THE WORLD, POLLSTAR #2, #8 IN THE UNITED STATES & #35 IN THE WORLD & TOP RANKED SMC ARENA IN NORTH AMERICA, POLLSTAR MID-YEAR, #19 IN THE UNITED STATES & #40 IN THE WORLD, POLLSTAR 3Q, #29 IN THE UNITED STATES & #36 IN THE WORLD, POLLSTAR YEAR END, #44 IN THE WORLD & #33 IN THE UNITED STATES (JAN 1, 2017 - DEC 31, 2017), IEBA YOUNG PROFESSIONAL OF THE YEAR NOMINATION, JOE GIORDANO, 2018 VENUE OF THE YEAR NOMINEE - ACADEMY OF COUNTRY MUSIC (7TH TIME) ARENA OF THE YEAR NOMINEE - POLLSTAR (7TH TIME), ARENA OF THE YEAR NOMINEE - IEBA (5TH TIME), IAVM VENUE EXCELLENCE AWARD WINNER, ARENA OF THE YEAR WINNER - IEBA (2ND TIME), VENUE EXECUTIVE OF THE YEAR NOMINATION - POLLSTAR - JEFF NICKLER, RISING STAR NOMINATION - POLLSTAR - JOE GIORDANO, NO. BEST HANG NOMINATION - POLLSTAR - BOK CENTER, POLLSTAR #1, #7 IN THE UNITED STATES & #24 IN THE WORLD, POLLSTAR MID-YEAR, #18 IN THE UNITED STATES & #40 IN THE WORLD, POLLSTAR 3Q, #18 IN THE UNITED STATES & #29 IN THE WORLD, POLLSTAR YEAR END, #23 IN THE UNITED STATES & #42 IN THE WORLD 2019 VENUE OF THE YEAR NOMINEE - ACADEMY OF COUNTRY MUSIC (8TH TIME), GENERATION NEXT NOMINEE - VENUES NOW - MEGHAN BLOOD, GENERATION NEXT WINNER - VENUES NOW - MEGHAN BLOOD, ARENA OF THE YEAR NOMINEE - ACADEMY OF COUNTRY MUSIC (8TH TIME), ARENA OF THE YEAR NOMINEE - POLLSTAR (8TH TIME), BEST NEGOTIATION NEXT WINNER - VENUES NOW - MEGHAN BLOOD, VENUE EXECUTIVE OF THE YEAR NOMINEE - IEBA, CASEY SPARKS, YOUNG PROFESSIONAL OF THE YEAR NOMINEE - IEBA - JOE GIORDANO, VENUE EXECUTIVE OF THE YEAR NOMINEE - POLLSTAR - CASEY SPARKS 2020 ARENA OF THE YEAR NOMINEE - POLLSTAR (9TH TIME) 2022 ARENA OF THE YEAR NOMINEE - ACADEMY OF COUNTRY MUSIC (9TH TIME), IAVM FOUNDATIONS 30 UNDER 30 - MAGGIE MINER

TULSA DOES IT BETTER



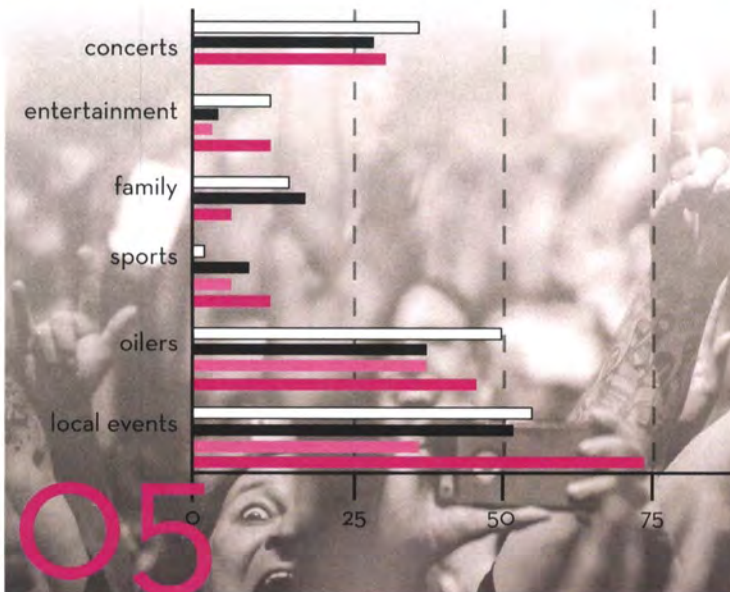
BOK CENTER BY THE NUMBERS

NUMBER OF EVENTS



TYPES OF EVENTS

○ FY19 ● FY20 ● FY21 ● FY22

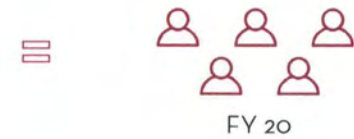


ATTENDANCE

721,307



583,006



84,518



583,006



NET INCOME

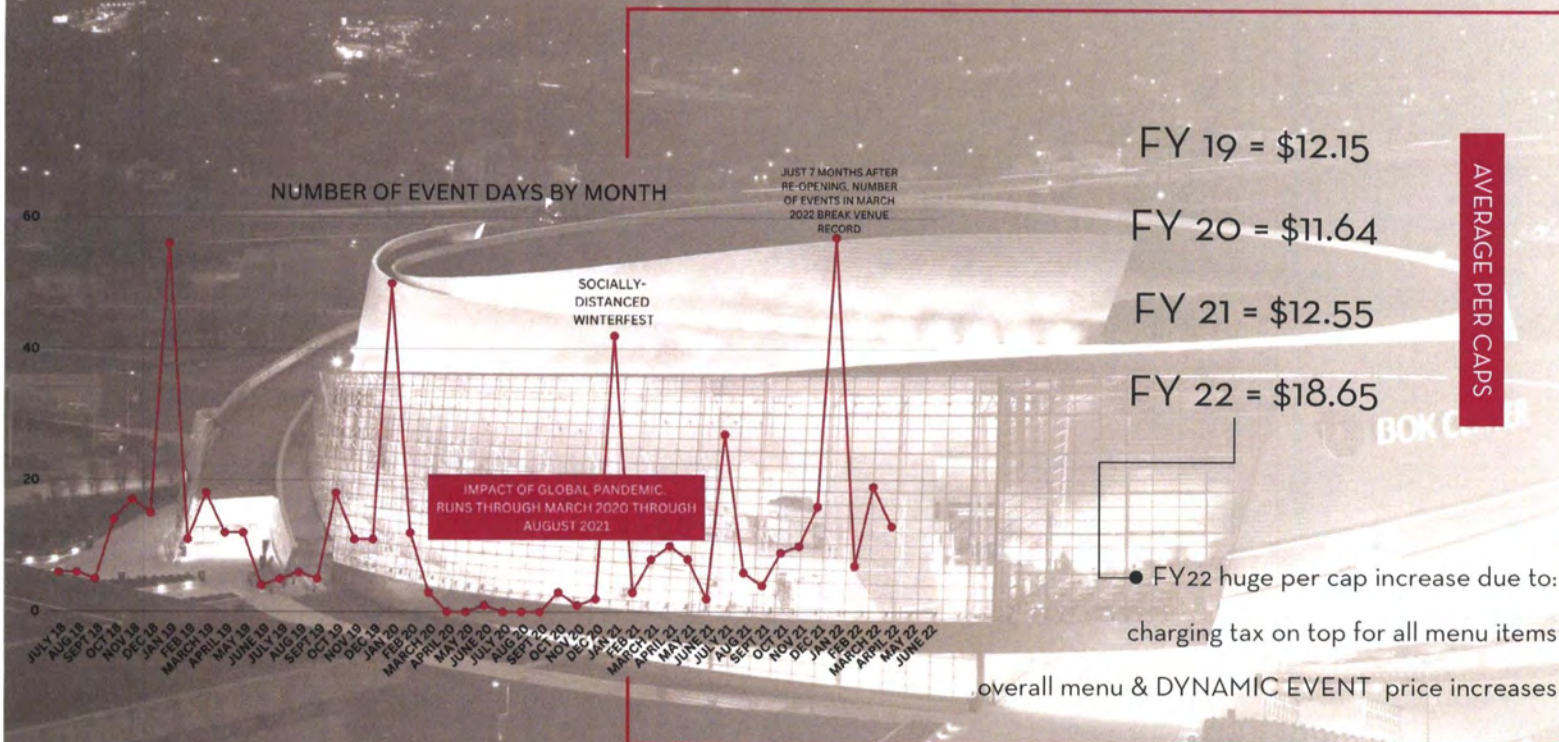
FY 19
\$3,371,192

FY 20
\$3,327,776

FY 21
(\$2,725,493)

FY 22
\$3,327,776

BOK CENTER BY THE NUMBERS



07

08

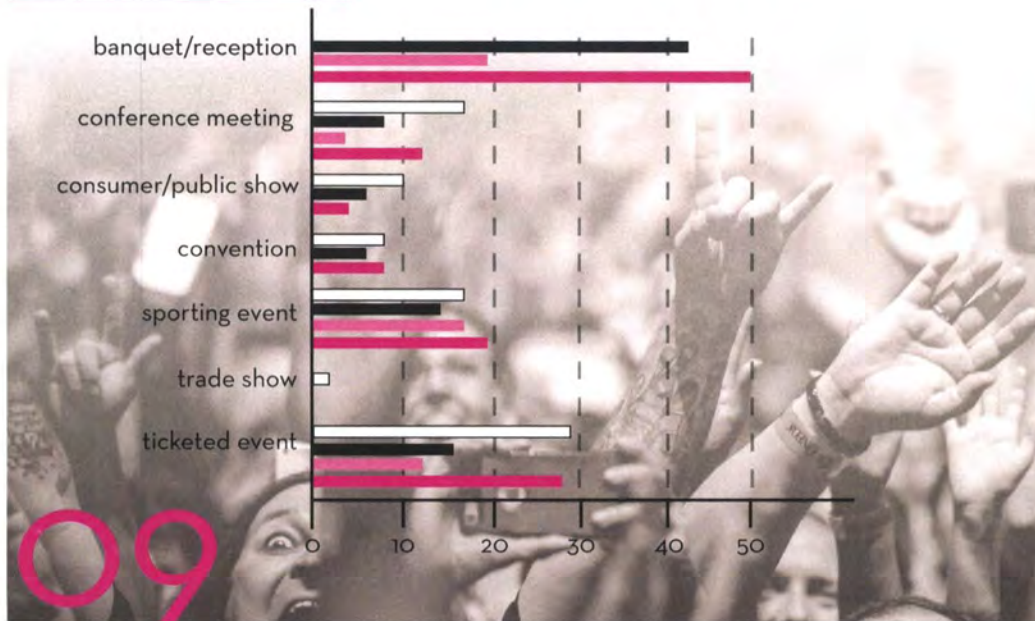
CBCC BY THE NUMBERS

NUMBER OF EVENTS



TYPES OF EVENTS

○ FY19 ● FY20 ● FY21 ● FY22

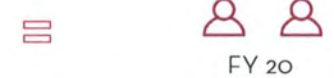


ATTENDANCE

183,892



85,292



49,484



150,738



NET REVENUE (LOSS)

FY 19
(\$2,801,619)

FY 20
(\$3,955,911)

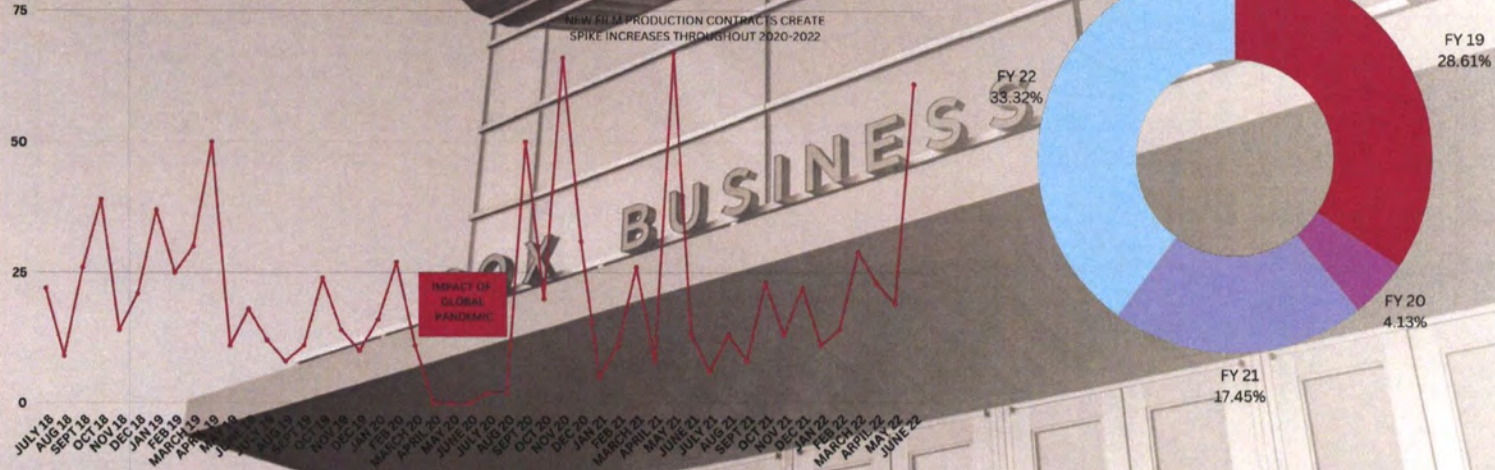
FY 21
(\$2,762,481)

FY 22
WAITING

CBCC BY THE NUMBERS

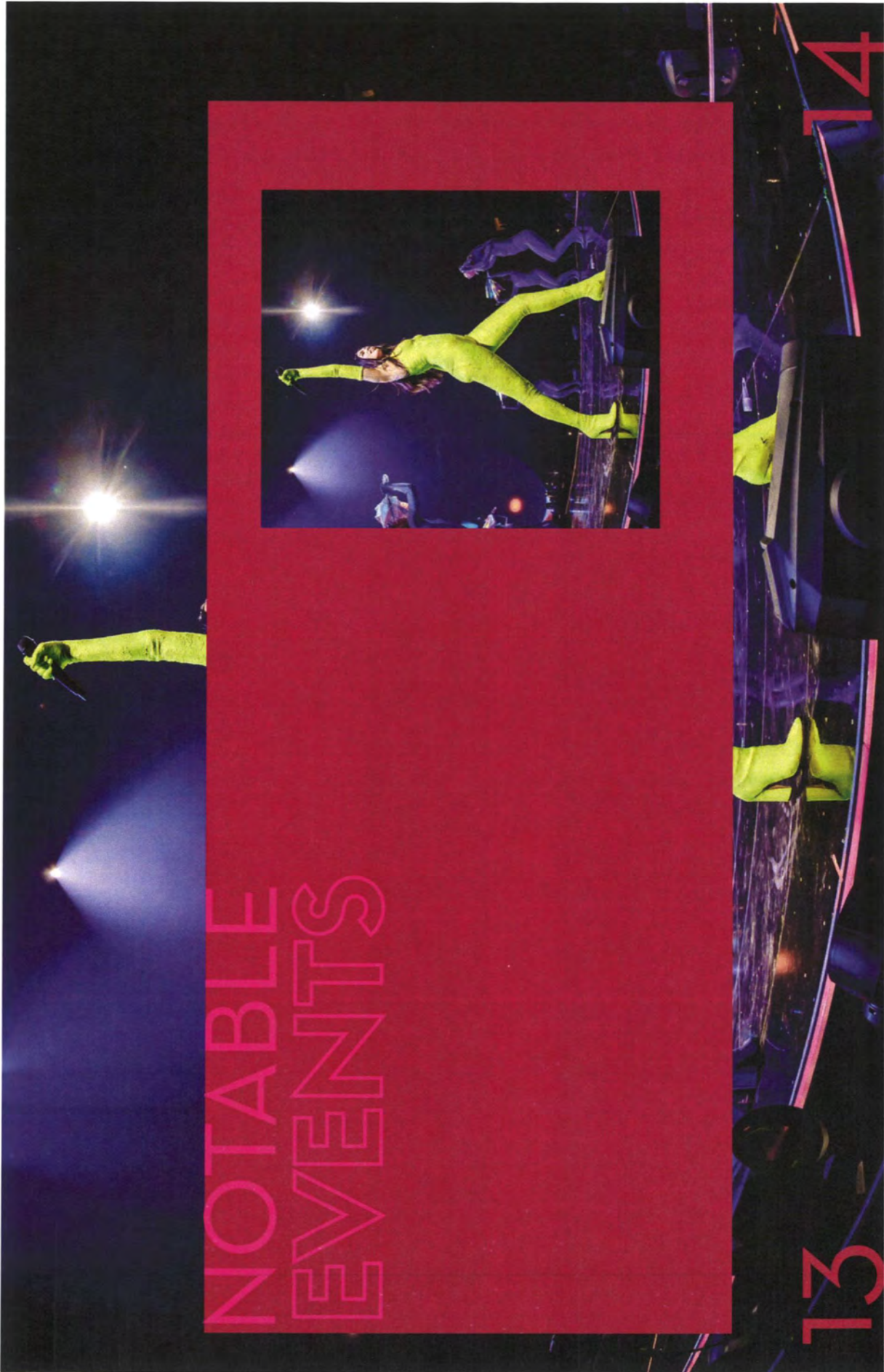
BUILDING OCCUPANCY

NUMBER OF EVENT DAYS BY MONTH



11

12



BOK CENTER EVENTS

Over the past 12 months, it has been both a challenging and rewarding process of bringing events back online in a post-pandemic world. BOK Center welcomed XXX fans for a year highlighted by sold-out shows by chart-topping country superstars, iconic classic rockers and the planet's biggest pop acts. 14 years after opening its doors, the arena continues to maintain its status as one of the nation's busiest concert venues. In the past fiscal year alone, BOK Center hosted 14 of the Top 100 worldwide tours in 2021 according to Pollstar Magazine. Looking back, there are several notable events that stick out from the rest because of milestones and/or records set at each show. Make sure to scan the QR code for each event to feel the FOMO!



august 27, 2021



ALAN JACKSON

first concert back in 17 months
after pandemic

15

march 14-16, 2022



ERIC CHURCH

Highest single-day event F&B sales,
beating the previous record by \$175K

may 16, 2022



THE EAGLES

Highest-grossing single night
concert record in 14 years

Previous highest-grossing single night concert
record was held by Paul McCartney in 2009
with a gross of \$2.603 million

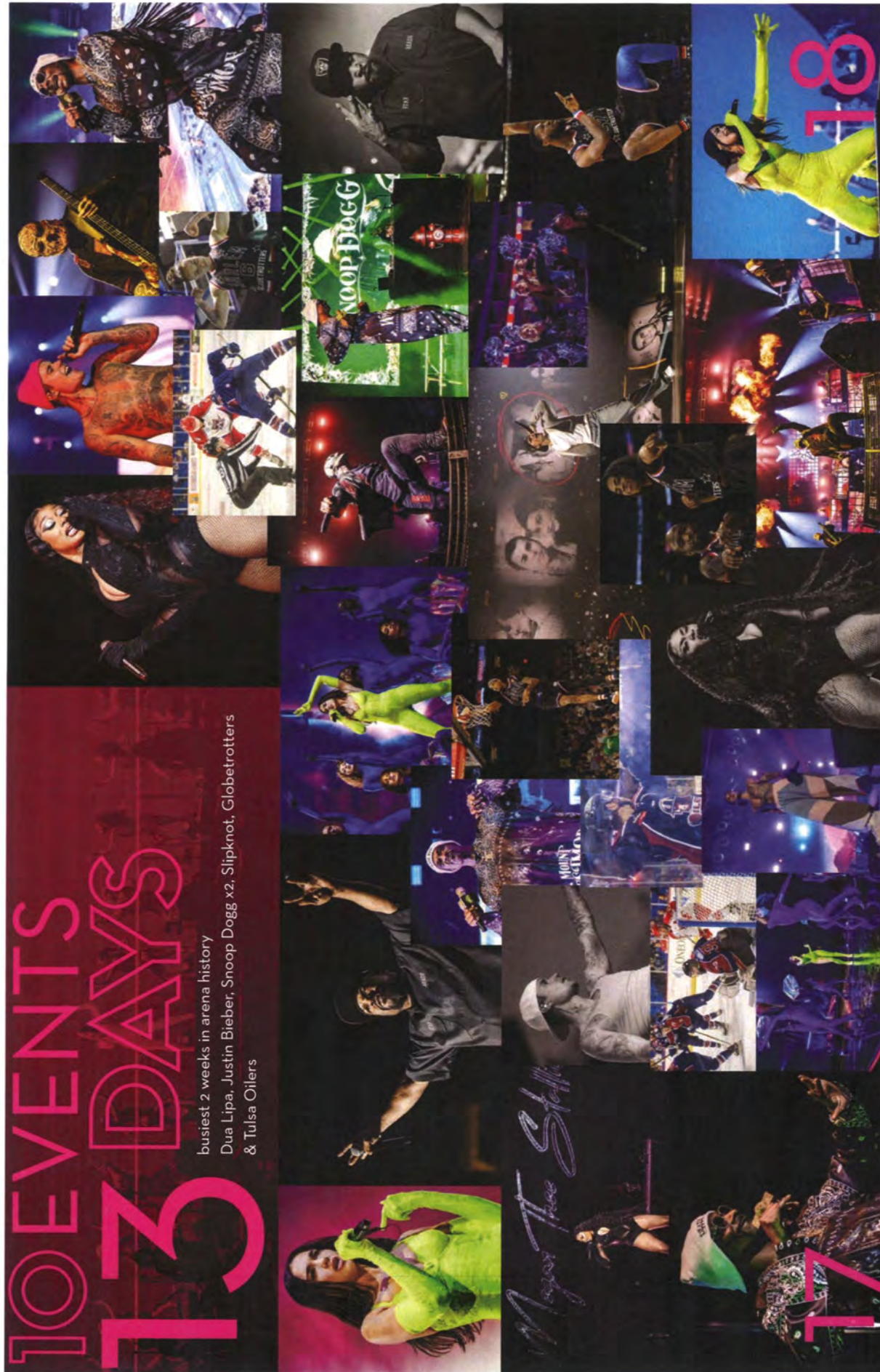
may 21, 2022



BROOKS & DUNN

first time playing BOK Center in
OVER 10 years

16



CBCC EVENTS

Looking back at some of our notable events from this fiscal year.



november 18, 2021

april 5-10, 2022

june 4, 2022

july 15-23, 2022

OKLAHOMA HALL OF FAME

celebrating the induction of 8 remarkable Oklahomans at the 94th annual induction ceremony - first time event in Tulsa

SENEGENCE INTERNATIONAL SEMINAR

international seminar

WORLD DANCE BREAKING OPEN QUALIFIER

first time event in Tulsa, beat out many other cities including New York City

USA VOLLEYBALL HP CHAMPIONSHIP

economic impact = \$8.5 million
room nights = 9,500

19

20



DO IT FOR THE GRAM

ALAN JACKSON

AUGUST 27, 2021

DUA LIPA

MARCH 17, 2022

JUSTIN BIEBER

MARCH 18, 2022

SNOOP DOGG & ICE CUBE

MARCH 24 & 25, 2022

KOE WETZEL

APRIL 9, 2022

THE EAGLES

MAY 16, 2022

BROOKS & DUNN

MAY 21, 2022

MACHINE GUN KELLY

JULY 9, 2022

JASON ALDEAN

AUGUST 6, 2022

23

Check out some of our biggest and most exciting public activations that gives our patrons an over the top experience.

For more content, check us out @bokcenter.



bokcenter



4,750

Posts

54.2K

Followers

248

Following

BOK Center

Performance & Event Venue

Showing fans how #TulsaDoesItBetter since 2008

#rocktheBOK

bokcenter.com

200 S Denver Ave, Tulsa, Oklahoma



THE EXTRA MILE

WHAT THE ARTISTS SAY:

"Thank you for one of the coolest welcomes I've ever had from a building." **Michael Bublé**

"All of the little touches you guys do for the artists may not seem like a lot to you guys when you do it, but they mean so much to us." **Parker McCollum**

"What you guys are doing around this tour is unbelievable."

Machine Gun Kelly

WHAT THE TOURS SAY:

"I wish I lived in Tulsa and worked here. You don't even know how great you all are. Can't wait to be back here!" **Lumineers**

"Thank you for the incredible catering. Every meal was wonderful - the band and crew are all raving about it. Thank you so much for making our day a wonderful experience."

Poison

"The welcoming gift your team created for MGK's cat was incredible! He can't stop talking about it and was so happy with how he was treated at the venue. Your team was fantastic and hope we can do more shows together in the future soon."

Machine Gun Kelly's Tour

"Thank you all for your help today. In the end, the house looked great and everyone was very happy, so well done!"

Dua Lipa

"Thank you all for a perfect night! The house looked great and appreciate all you did to make it happen. We look forward to our next show."

Michael Bublé

25



this is hilarious and perfect and I already cried during soundcheck tonight's gonna be a lot



SOCIAL STATS



58,270
INSTAGRAM FOLLOWERS
@bokcenter



210,453
FACEBOOK FOLLOWERS
@BOK Center



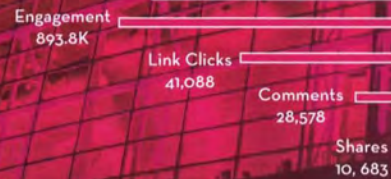
84,465
TWITTER FOLLOWERS
@BOKCenter

116,374
ACCOUNTS REACHED

CONTENT REACH



3.2M
PEOPLE REACHED



238.4K
IMPRESSIONS

ENGAGEMENTS

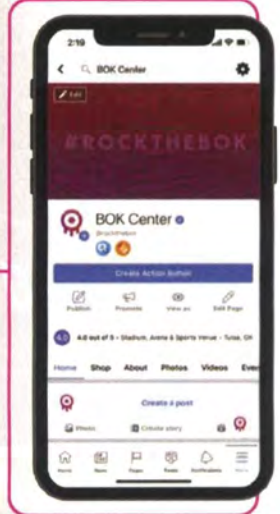
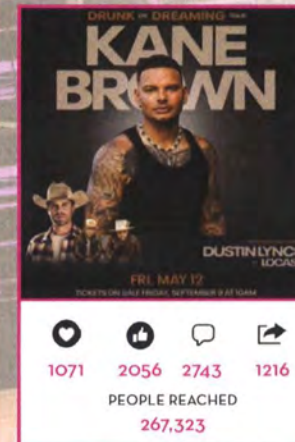
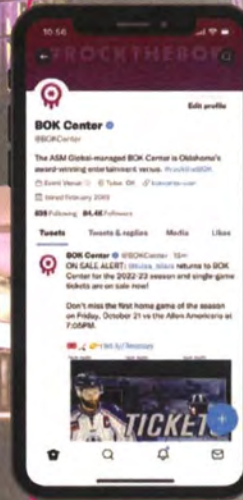


A 90 DAY SNAP SHOT

27



**GOT
ENGAGEMENT,
YES WE DO!**



28

SURVEY SCORES

ALL SURVEY SCORES ARE OUT OF 10.0 TOTAL POSSIBLE
SURVEY DATA REFLECTS 9/2/21 - 6/30/22

8.4

OVERALL SCORE

8.7

SECURITY

8.6

STAFF

8.7

ENVIRONMENT

8.5

TECHNOLOGY

8.6

SECURITY OTHER VENUES AVG

8.6

STAFF OTHER VENUES AVG

8.2

ENVIRONMENT OTHER VENUES AVG

8.4

TECHNOLOGY OTHER VENUES AVG

8.2

OVERALL SCORE OTHER VENUES AVG

29

WHAT THE FANS SAY:

Wow BOK, y'all's lineup this week alone 🍌🍌🍌🍌

BOK this was an awesome experience 🔥🔥🔥

This is awesome!! Y'all were so thoughtful and welcomed him so amazingly!! Thank you!! 100 ❤️ I hope every person in attendance had the time of their lives & made awesome memories they'll never forget!!

You did a wonderful job 🍌🍌🍌🍌

I want to know what kind of special gift you gave these two??? 🍌🍌🍌🍌 like it had to have been amazing!

Everything was top notch, cleaned, staffed accordingly, staff was friendly and helpful, club seating was amazing. Concert was outstanding and made great memories with my daughter because of you.

It was all wonderful. Friendly, safe, clean and the concert was once in a lifetime!

I was very impressed with the BOK. We always attend concerts & events at Paycom in OKC, but now it will change... Tulsa Town here we come!

You're KILLING it BOK Center! With every artist that comes through 🍌

The event center and the staff was extremely exceptional and very helpful!

Every staff member I talked to was extremely helpful and polite. My son and I extremely enjoyed our time there.

Outstanding! I appreciate your creativity!! 100 🍌

Absolutely amazing venue and staff! We flew in from VA to see this concert, and would do it 100x over.

I have yet to attend a sub-par event at the BOK Center. The acoustics are outstanding.

Just moved here from California so compared to what I've been used to, not that they were bad but BOK seemed extremely organized and everything from the entry to the souvenir stands went quickly.

Every event has always been an exceptional experience at the BOK.

30



SOCIAL STATS



1,906

INSTAGRAM FOLLOWERS
@coxcentertulsa



9,154

FACEBOOK FOLLOWERS
@Cox Business Convention Center



336,440

WEBSITE PAGE VIEWS
coxcentertulsa.com

39.2K

ACCOUNTS REACHED

CONTENT REACH

Reels

1,122

Posts

250

Stories

161

Videos

69

664.2K

PEOPLE REACHED

Engagement

1.2K

Page Visits

5,092

New Likes & Follows

366

100K

PAGE VIEWS

INSIGHTS

Bounce Rate

1.91%

AVG Duration

1 M 17S

A 90
DAY SNAP
SHOT



40 1 0

ACCOUNTS REACHED

413



332 29 27

PEOPLE REACHED

21,327



34

33

SURVEY SCORES

ALL SURVEY SCORES ARE OUT OF 4.0 TOTAL POSSIBLE

3.91

OVERALL SCORE

3.97

Q1 AVERAGE

3.85

Q2 AVERAGE

3.83

Q3 AVERAGE

3.91

Q4 AVERAGE

3.96

SECURITY OTHER VENUES AVG

3.8

STAFF OTHER VENUES AVG

3.95

ENVIRONMENT OTHER VENUES AVG

3.85

TECHNOLOGY OTHER VENUES AVG

3.86

OVERALL EXPERIENCE

35

WHAT THE CLIENTS SAY:

"Your staff made this work, period. Our needs might have been rather custom but they understood that and quickly presented solutions that immediately made me forget other options. This event was a complete success in our eyes thanks to your staff!"

AAA Route 66 Video Shoot client

"The operations team who set the tables and chairs are rock stars. I don't think I have ever seen rows as straight and precise. I want to take them to all my events! We had to do a last-minute change to the diagram and they did it with great attitudes."

AGCOK client

"We had a lot of twists and turns due to weather and having to adjust so the speakers could present and all teams were able to adapt with us seamlessly. The food & beverage team provided incredible food for our event that we had many compliments on from our guests."

ASLA Central States Conference client

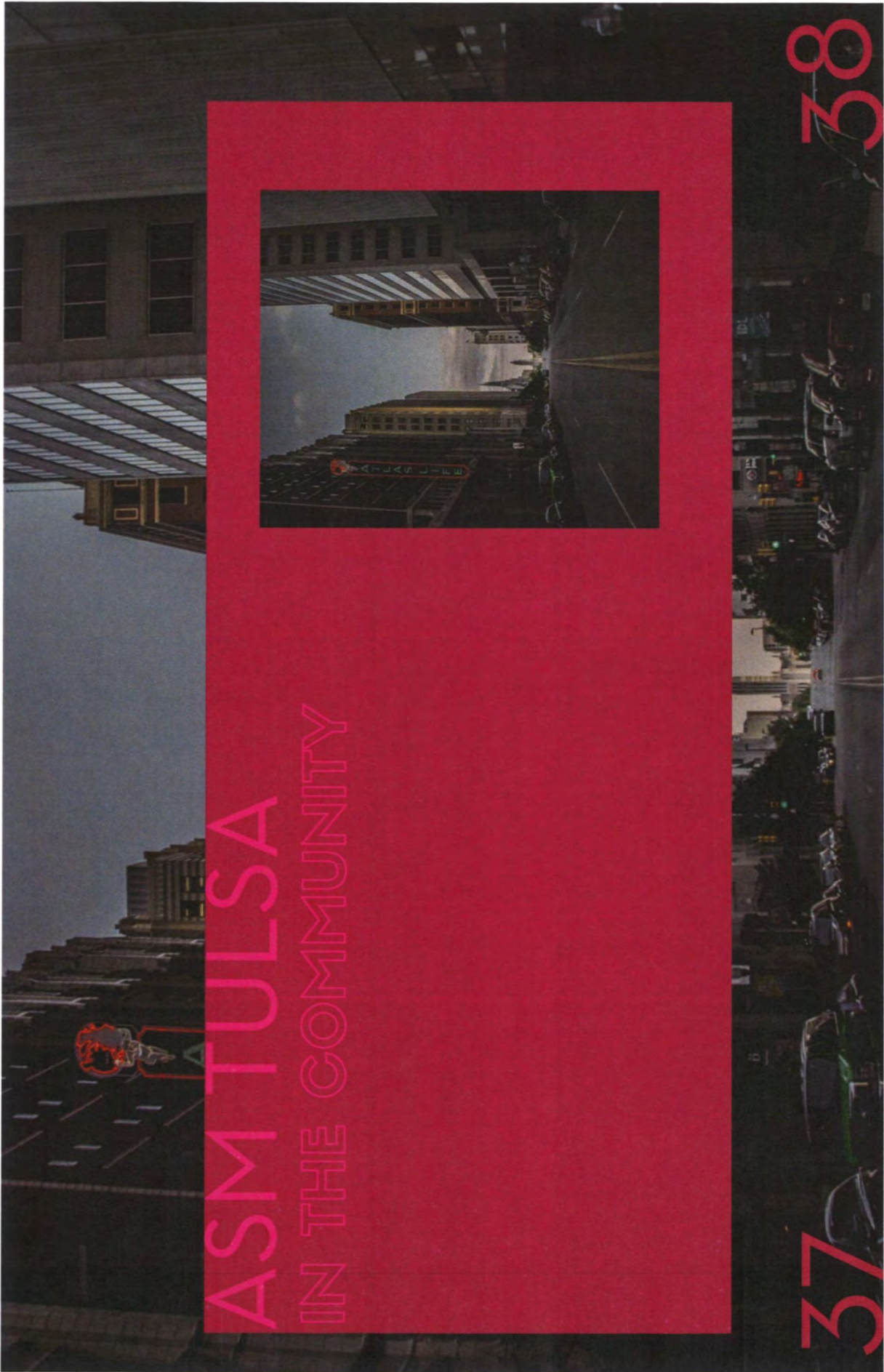
"Technology services, event setup, and food and beverage all were top-notch. We had a lot of twists and turns due to weather and having to adjust so the speakers could present and all teams were able to adapt with us seamlessly."

ASLA Central States Conference client

"The event and food & beverage teams were especially helpful, so kind and available at any moment to assist or resolve anything we needed. They and their teams were amazing at every turn!"

American Heart Association

36



ASM GLOBAL ACTS

Corporate social responsibility platform, ASM GLOBAL ACTS, which dramatically elevates the entertainment giant's commitment to protect the environment, invest in people and strengthen communities around the globe.

BURNCO & FARM BAR FUNDRAISER

- fundraising opportunity at Eric Church concert
- \$3,000 donated at show
- \$3,000 matched by local companies
- \$6,000 matched by ASM Global
- \$12,000 TOTAL RAISED



DONATIONS

- \$67,500 raised at the charity events for the following clients:

OKLAHOMANS FOR EQUALITY
MENTAL HEALTH ASSOCIATION OF OKLAHOMA
TCC FOUNDATION
RESONANCE CENTER FOR WOMEN
HABITAT FOR HUMANITY
HEALTH OUTREACH PREVENTION EDUCATION
PARENT CHILD CENTER OF TULSA
CATHOLIC CHARITIES

FAMILY & CHILDREN'S SERVICES
TULSA CARES
GIRL SCOUTS OF EASTERN OKLAHOMA
VOLUNTEERS OF AMERICA
TULSA BALLET
COMMUNITY FOOD BANK OF EASTERN OKLAHOMA
AMERICAN HEART ASSOCIATION



- These dinners account for 300 hours of time donated by our culinary staff
- 3,445 pounds of prepared food leftover from events along with raw materials near the end of their shelf-life donated to John 3:16 Mission
- Executive Sous Chef SARAH LEAVALL donated over 70 HOURS to non-profit culi-
- OVER 2,000 TICKETS WORTH \$120K DONATED TO 70+ LOCAL TULSA ORGANIZATIONS

39

ASM GLOBAL ACTS SCHOLARSHIP

TULSA LEADS U.S. CITIES WITH MOST COLLEGE SCHOLARSHIPS AWARDED BY ASM GLOBAL

(Tulsa, Okla.) August 16, 2022 – ASM Global has announced six Tulsa students—the highest total of any U.S. city and from amongst hundreds of applicants—as recipients in the inaugural ASM Global Stars Scholarship Program.

Emmeline Alvizo, Theresa Lam, Alexa Miranda, Evelyn Munoz, Ana Ochoa and Sarah Wayd all received scholarships with 22 other recipients from across the country. The six women are studying at The University of Tulsa in various programs including international business, cybersecurity, finance and human resources.

The six will kick off their activities with a special behind-the-scenes and entertainment experience at The Lumineers concert tomorrow night (8/17) at BOK Center.

The scholarship program is part of ASM Global's social responsibility platform, ASM Global Acts, which is committed to investing in people, protecting the environment and strengthening communities.

In Tulsa, ASM Global and ASM Global employees partner with local nonprofits and community organizations to donate time and talent, provide philanthropic and engagement support, and host community-centered events at the venues. The scholarship program commits to providing diverse and under-resourced communities with educational and career development opportunities through scholarship awards and prospective internships.

"Because of ASM Global, I will be able to finish my last year of college and become a first-generation graduate. There are no words that can express the amount of joy and gratitude this opportunity has given me," said Emmeline Alvizo, a senior earning a degree in business and international studies.

Bryan Crowe, vice president and general manager for ASM Global Tulsa, which manages the BOK Center and Cox Business Convention Center, said, "I am so pleased that Tulsa had such quality candidates that our community received the largest number of scholarship recipients across the country." We are continually looking at ways to engage the future workforce," said Crowe. "In addition to the financial support, all six students will have an opportunity to intern and tour both the BOK Center and Cox Business Convention Center. We're looking forward to hosting them."

"We are incredibly proud to support students in our local communities by investing in their education and making college accessible and affordable and by offering career development opportunities for our future leaders," said ASM Global President and CEO Ron Bension. "Our ASM Global Acts program is committed to making a difference in the communities where we do business."



40

BOK CENTER EVENT CALENDAR

150 TOTAL EVENTS

july 31 + aug 1 // PBR

aug 13 // WWE SMACKDOWN

aug 18 // BLIPPI

aug 22 // GLOBETROTTERS

aug 27 // ALAN JACKSON

sept 11 // TOUGHEST MONSTER TRUCK

sept 18 // ENDUROCROSS

sept 24 // BLAKE SHELTON

oct 1 // MERCYME

oct 2 // KISS

oct 4 // TOBYMAC

oct 7 // JOHN LEGEND

oct 14 // OKC THUNDER

oct 15 // MARC ANTHONY

oct 23 // ALABAMA

oct 29 // ELEVATION WORSHIP

oct 31 // LANY

nov 4 // CHRIS STAPLETON

nov 13 // DAN + SHAY

nov 19 - jan 3 // WINTERFEST (ASM special event)

nov 26 // CODY JOHNSON

dec 4 // JOE ROGAN

dec 11 // OU vs ARKANSAS B-BALL

dec 27 - 29 // TOURNAMENT OF CHAMPIONS

jan 17 // WWE RAW

jan 29 // JEFF DUNHAM

jan 30 // TOOL

feb 12 // WINTER JAM

feb 19 // ERIC CHURCH

march 5 + 6 // BIG 12 WRESTLING CHAMPIONSHIP

march 14 // PRICE IS RIGHT LIVE

march 17 // DUA LIPA (sold-out)

march 18 // JUSTIN BIEBER (sold-out)

march 23 // SLIPKNOT

march 24 // SNOOP DOGG (sold-out)

march 25 // SNOOP DOGG (sold-out)

march 26 // GLOBETROTTERS

april 9 // KOE WETZEL

april 15 + 16 // PBR

april 23 // SMOKE & GUNS

april 29 // MARCO ANTONIO SOLIS

april 30 // MEDADETH & LAMB OF GOD

may 16 // EAGLES (sold-out)

may 21 // BROOKS & DUNN

may 24 // JACK WHITE

june 3 // NELLY



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MARKETING & SALES PLAN FISCAL 2023

OSCEOLA HERITAGE PARK / ASM GLOBAL

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OVERVIEW

Osceola Heritage Park (OHP) is "Where Central Florida Comes To Play." The 200-acre entertainment complex in Kissimmee, Florida, features the 10,000-capacity Silver Spurs Arena; 48,000-square-foot Events Center; the 7,000-square-foot state-of-the-art Heritage Club; the 5,400-seat Osceola County Stadium; and festival grounds capable of accommodating up to 50,000 guests. OHP hosts approximately 350 events and welcomes over 700,000 visitors annually.

A wide variety of events take place at OHP, including several recurring signature events: Silver Spurs Rodeo, Mecum Auctions, and Country Thunder. In addition to playing host to conventions, trade shows, concerts, and amateur athletic events, OHP is also the home of two professional sports teams: Orlando City SC's MLS Next Pro team, Orlando City B, and the Orlando Magic's G-League team, the Osceola Magic.

The sprawling OHP campus is conveniently located just minutes from downtown Orlando, Disney World, Sea World, and Universal theme parks.

MISSION STATEMENT

"Osceola Heritage Park will enhance and enrich the lives of Central Florida citizens and its visitors by providing a variety of events to entertain a diverse demographic. Through events, trade shows and entertainment, we will serve as a driver of economic impact and be a positive influence on Osceola County and Central Florida's quality of life."



BACKGROUND & NICHE

The Greater Orlando or Metro Orlando area is the third-largest metropolitan area in Florida by population, the seventh-largest in the Southeast, and the 23rd largest in the United States. Its principal cities include Orlando, Sanford, and Kissimmee - home of OHP.

Six significant entertainment venues as well as four of the world's major theme park destinations are within 20 minutes of OHP. In addition, there are another ten impressive entertainment venues within a 60-mile radius, making for a very competitive environment. OHP, however, has some unique attributes, and it is this uniqueness on which we focus and strategize to attract events that best fit our *niche* in the live event space.

OHP is uniquely positioned to host:

- **Amateur & Professional Sports** - Equestrian, Soccer, Basketball, Cheer, Wrestling, Boxing, and Jiu-Jitsu
- **World/Cultural Events** - Latin, Asian, and Religious
- **Outdoor Events** - Music Festivals, Political Rallies, Car Shows, and the Osceola County Fair
- **Trade Shows/Conventions** - Jewelry, Collectibles, Business, and Gaming
- **Community Programs** - State Exams, Graduations, and County Initiatives
- **Concerts & Family Entertainment**

OUR STRENGTHS

- Excellent relationships with Osceola County government officials, school district, and police department, as well as local stakeholders, including the Silver Spurs Riding Club, KVLS, University of Florida Extension Services, Orlando City Soccer Club, and the Orlando Magic
- Meaningful relationships with local media
- Consistent long-term building management
- Enthusiasm and dedication of entire OHP team
- Management's vision for OHP which pushes the team and the venue to ever greater heights
- Versatility due to multiple venues on property and vast outdoor acreage
- Location in Florida's second-fastest-growing county (10th in the U.S.), and in a region that is widely recognized as the number one tourist destination in the world
- Two major professional sports teams on property: Orlando City B and Osceola Magic
- Solid relationships with clients resulting in 85% repeat business
- Major facility improvements both in design and functionality:
 - Digital signage across the property, including three large-scale marquees at major intersections and directional signs
 - Renovation of Events Center meeting rooms, Arena entrance, concourse and suites
 - LED lighting at Arena and Events Center
 - Improved WiFi for visitors
 - State-of-the-art Heritage Club to elevate VIP and fan experiences
 - Expanded festival area for large-scale outdoor events like Country Thunder
- On-site catering by SAVOR... Kissimmee which handles all food preparation in its fully-staffed commercial kitchen
- Numerous sustainability initiatives
- Renewed agreements with suite holders and advertisers
- Support from our ASM Global corporate offices
- Strong Estimated Economic Impact for Osceola County at approximately \$75.7 million for period October 2022 through February 2023

CHALLENGES: ARENA

- Rigging challenges due to low ceiling
- Grid has minimal load capacities for rigging
- Open concourse causes production problems for some events
- Spotlight locations
- Cannot offer naming rights
- Venues less than 30 minutes away with a variety of advantages:
 - Amway Center is located in downtown Orlando and attracts A-list talent
 - State-of-the-art UCF Arena with 40,000 students and tens of thousands of alumni as potential ticket buyers
- Live Nation's House of Blues at Disney Springs and Hard Rock Live at Universal Orlando have worldwide brand recognition and are typical tour stops for popular touring acts that need up to 3,000-guest capacity
- Dr. Phillips Center has multiple performance spaces, acoustically perfect sound, and a lock on Broadway and other touring acts which play a 2,500-seat theater





CHALLENGES: EVENTS CENTER

- Meeting rooms lack standard AV inputs/outputs typical of meeting facilities
- Electrical distribution in main Hall is minimal
- No kitchen facilities at Events Center makes catering a challenge
- No loading dock
- No hotel on property is a challenge for meeting planners and event organizers
- No hotels within 25 minutes that have enclosed corridors
- Poor directional signage from Orlando International Airport
- Environmental blight - surrounding area is less than attractive and many of the buildings on the way to OHP are rundown or abandoned

NEW BUSINESS OPPORTUNITIES

AMATEUR & PROFESSIONAL SPORTS

We continue to build and cultivate this category of business. Our amateur sports relationships bring more competitions to Osceola County every year, including dance, cheer, gymnastics, jiu-jitsu, wrestling, and more.

We have successfully collaborated with Osceola County and two professional sports teams, Orlando City SC and Orlando Magic, to bring professional soccer and basketball to OHP. We work closely with Experience Kissimmee (the city's visitor's bureau) and the Greater Orlando Sports Commission in soliciting new business opportunities.

We are also aggressively pursuing regional and national professional sporting events, such as boxing.



ORLANDO CITY SC

Orlando City SC has made its new official training grounds at OHP. In 2019, a 20-acre complex was developed for the Major League Soccer Club, and its MLS Next Pro team, Orlando City B. The training complex features state-of-the-art facilities, including a fitness, training and recovery center; film review room; a players lounge and dining area; and four practice fields. Orlando City B plays home games at in Osceola County Stadium at OHP.



OSCEOLA MAGIC

We have recently entered into an agreement with the Orlando Magic to move its NBA G League affiliate to OHP. The new team will be branded Osceola Magic and will begin playing at Silver Spurs Arena in November 2023. This partnership will not only bring exciting professional basketball games to OHP, but also provide new opportunities for local businesses and tourism.

WORLD/CULTURAL EVENTS

We continue to serve diversity by booking a wide-range of programming. We work closely with regional, national, and international promoters to bring events that speak to the multi-cultural roots of our community. In the first quarter of 2023 alone, we have hosted an international soccer competition between Germany and Colombia, a Bollywood extravaganza The Entertainers, The 5th Asian Food Music and Cultural Festival, Expo Brazil, and the Chol Hamoed Pesach Riverside Experience.



OUTDOOR EVENTS

We have a multi-year agreement with Country Thunder Festivals, a well established international brand, to produce a three-day music festival. We are confident this relationship will help solicit new multi-day music festivals. Our 200-acre complex with multiple venues make us a unique and desirable location for these kinds of large scale outdoor events. Our unparalleled success with Mecum Auctions, which set a record for sales at our facility in January 2023, and now with Country Thunder will give us credibility when speaking with other festival promoters. These multi-day events are not only revenue positive for OHP, they provide significant economic impact for Osceola County.

EQUESTRIAN

The Silver Spurs Riding Club, after which the Arena was named, has been conducting rodeos in Osceola County for over 140 years. We are home to the Silver Spurs Rodeo, which holds multiple events at our venue each year, and have maximized that moniker to attract other related equestrian events.





TRADE SHOWS

Our main competitor in this category is the Orange County Convention Center and, secondarily, the RP Funding Center. However, we have advantages over both venues such as excellent customer service, pricing, ample parking, size and location. We will continue to solicit promoters and target all appropriate trade shows.

COMMUNITY SERVICE

As a County-owned building, we are at the forefront of education drives, trainings, sheriff initiatives, graduations and civic responsibility. As a partner in this community we will seek out all opportunities to serve our area and bring worthwhile events to our venue.

CONCERTS/ENTERTAINMENT

We are in a hyper-competitive environment for concerts and other live entertainment as our region has several competing area concert venues. To help gain new business in this category, we provide agents and promoters with compelling reasons to bring their event to OHP, and focus on genres that may be underserved or would be ideal at our venue. We also work directly with Osceola County, as well as with prospective sponsors and business partners, to enable us to bring in certain shows to the region. Having the support of ASM Global along with County officials and other stakeholders is an absolute plus.

OSCEOLA HERITAGE PARK / ASM GLOBAL

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OSCEOLA HERITAGE PARK / ASM GLOBAL

SALES, SPONSORSHIPS & GROUP SALES

OBJECTIVES

- Maintain current revenue and client relationships
- Explore new and innovative revenue streams
- Implement incremental increases in sponsor packages and suite sales
- Provide vigorous outreach to bolster group sales efforts
- Enlighten vendors and outside companies to the benefits of venue advertising

STRATEGIES

- Increase sponsorships, advertising revenue and suite sales by 10% in 2023
- Increase revenue for all renewals by 5%
- Target new local, regional and national business
- Create new advertising opportunities inside the venue
- Explore viability of working with Orlando Magic to assist with sponsorships and group sales*

**We believe our new partnership with the Orlando Magic will allow us to gain new sponsorships, as well as increase group and suite sales.*



OSCEOLA HERITAGE PARK / ASM GLOBAL

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VENUE & EVENT ADVERTISING

OBJECTIVES

- Collect information from promoters in order to assist them with developing strategic marketing plans
- Make recommendations for placements with pertinent media, including social spends when appropriate
- Advertise in trade publications to keep OHP top of mind for promoters with the goal of continually increasing bookings
- Work with Experience Kissimmee and other Chambers to market the venue to niche markets
- Maintain established media relationships and develop new ones to increase exposure and leverage for clients
- Maintain relationships with high level executives at all local media outlets
- Work with media to assist in co-promoting events
- Identify new data analytics services, such as Zartico, that can provide insights for marketing OHP events



STRATEGIES

- Provide area profile, demographic information, media landscape and other marketing information to all promoters
- Position the OHP Marketing Department as a significant provider of marketing assets and media leverage
- Continually provide media with press releases of upcoming events, successes, and impact on the community

MARKETING SERVICES & SUPPORT

IN-HOUSE MARKETING SERVICES

- OHP's marketing team is second to none and can increase event attendance and profitability through leveraging media and identifying critical markets
- Advertising/Reciprocal Trade - OHP has longstanding relationships with print, radio and TV which cover Central Florida and beyond; Editorial consideration, trade advertising, special promotions and consideration can be used to increase awareness of the event and venue

NEW MEDIA MARKETING

- Website - Responsive website seamlessly integrates ticket buying, social media, search and information
- E-blasts - OHP has an opt-in database of over 100,000 subscribers for use in pre-sales, promotions, and group sales; Lists are customized for best results with an 80+% open rate

SOCIAL MEDIA

- OHP's growth in social media marketing has been substantial and we will continue to provide the latest in compelling, fun and informative posts on Facebook, Twitter, Instagram and other platforms for event news




DIGITAL SIGNAGE

- Marquees - Three marquees at strategic intersections around OHP property promote upcoming events
- Pedestals - Four pedestals, two in front of the Arena and two in front of the Events Center, promote upcoming events, welcome attendees, and rotate sponsors
- Wayfinders - Three wayfinders provide directional information, rotate sponsors, and thank visitors for coming
- Centerhung and Ribbons - Located in the Arena for upcoming events and advertising
- LED Signage - Rotating upcoming events and advertising in the Arena and Events Center lobbies

ticketmaster

Hurry 20% off Tickets Ends Soon



The Entertainers

Sat • Mar 11, 2023
KISSIMEE, FLORIDA


Enter Code: **BOLLYWOOD**


[See Tickets](#)


Exclusive — You Get Discounted Tickets

Get ready to experience the biggest Bollywood extravaganza in Florida with some of the most celebrated entertainers, including Akshay Kumar, Nora Fatehi, Disha Patani, Sonam Bajwa and more. It's a once-in-a-lifetime opportunity to see these amazing performers in a show that will make you laugh, sing, and dance in the aisles!

Use code 'BOLLYWOOD' to get 20% off your tickets to **The Entertainers** live at Silver Spurs Arena in Orlando on Saturday, March 11. Discount applies to tickets at price levels \$500, \$299, and \$249. Hurry! Offer ends Wednesday, March 8 at 11 pm ET.

 **Download the App**
★★★★★

 **Download on the App Store**

 **GET IT ON Google Play**

TICKETMASTER MARKETING

- Email marketing to an immense database of subscribers for newsletters and promotional emails, plus analytical data provides tracking to determine effectiveness of campaigns
- 'Came from Code' and pixel tracking capabilities with thorough reporting provides analytics and consumer market data
- Integration with social media through ticket tracking links on posts
- Ad space on 'Print at Home' tickets as well as ticket confirmation page
- TM 360 allows promoter to view sales statistics including purchaser info
- Additional TM marketing services include an automated suite of email alerts and push notifications, as well as CENs (pictured, left)

PUBLIC RELATIONS

- Distribute press releases to media and community contacts
- Set up interviews or special feature coverage
- Coordinate meet and greets, media promotions, pre- and post-event activities
- Assist in radio remotes and broadcast opportunities

SOCIAL MARKETING

OBJECTIVES

- Increase ticket sales, venue and event awareness through engaging and user-friendly updates
- Strategically utilize all social media platforms to increase following and page/post likes and shares
- Increase overall post engagement and click through rates on existing social media platforms
- Establish a 'narrative' social media campaign that posts engaging content to platforms
- Stay up on the latest web/social media applications

STRATEGIES

- Incorporate social media in all event marketing and venue awareness campaigns, including Facebook events
- Call to action signage and contests to increase page and post engagement while on site
- Utilize new website updates to attract new audiences and maintain current following and keep them browsing longer
- Provide creative and compelling content about the heritage of OHP, new building updates, upcoming events, 'behind the scenes' and added value narratives that keep targeted audiences engaged





COMMUNITY OUTREACH

We will continue service to our community by providing complimentary tickets to shows for non-profits and individual volunteerism. Our staff is committed to several community outreach endeavors throughout the year, including:

- Junior Achievement
- Give Kids the World
- Osceola Council on Aging
- Meals on Wheels
- Boys and Girls Club

SAVOR...KISSIMMEE

Our Food and Beverage department is a significant revenue growth opportunity for OHP. As such, we will continue to increase the visibility of Savor...Kissimmee in the community and beyond. Our advertising and promotion will position Savor...Kissimmee as a world-class caterer. Using the tag line 'The Art of Catering,' we will use social media, venue signage and print to inform individuals and companies of our food and beverage capabilities, which include:

- Renting our new 7,000 square foot lounge, The Heritage Club, for corporate and private parties
- Pre-show and post-show activities
- Off-premise catering
- Using the Events Center for large County functions
- Renovated arena concessions stands to provide greater revenue capabilities





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CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items - No Action

SUBJECT:

Department of Human Services (DHS) - Transportation Disadvantaged Business Enterprise (DBE) Goal

BRIEF SUMMARY:

Cabarrus County Transportation is in the process of becoming a direct recipient of the Federal Transit Administration (FTA) for 5307 Grant funds. In order to become a recipient Cabarrus County is required to establish a Disadvantaged Business Enterprise (DBE) Goal. A public hearing is required for any feedback on this goal. The Public Hearing notice has been posted.

REQUESTED ACTION:

Hold a public hearing on the Disadvantaged Business Enterprise (DBE) Goal

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

Bob Bushey, Transportation Manager

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▢ Cover letter
- ▢ DBE Goal
- ▢ English Public Hearing Notice
- ▢ Spanish Public Hearing Notice



Cabarrus County North Carolina/Cabarrus County Transportation would like to submit for approval our three-year annual DBE Goal. The County is dedicated to having a successful DBE Program and has followed the program guidance carefully.

The County presents an annual goal of 0.12%. This goal reflects the expected level of participation of DBE(s) in local FTA-assisted contracts with Cabarrus County in each of the three fiscal years covered by this goal.

This submission contains tables and narratives to support all calculations and methodology used as required in Section 26.45 Overall Goal Calculation. The following lists the supporting documentation you will find within:

- 1.) Estimated Annual FTA Assisted Contracts
- 2.) Relative Availability of DBE's using North Carolina's UCP Directory of Firm and the US Census Bureau County Business Patterns
- 3.) NAICS Code and Estimated Funds For each Potential Contract Opportunity and Weight
- 4.) Adjustment/Goal/Means
- 5.) Consultation/Publication

Please forward all questions and concerns regarding the proposed three-year annual DBE Goal to Bob Bushey, Transportation Manager, for any assistance or needed changes you may propose. Thank you for your review of our program.

Sincerely,

Robert Bushey

Transportation Manager

rwbushey@cabarruscounty.us

(704) 920-2932



Introduction

Cabarrus County's Annual DBE Goal for FFY 2023-2025

Pursuant to 49 CFR 26, Cabarrus County has analyzed data and determined that, for federal fiscal years (FFY) 2023-2025 the overall annual Disadvantaged Business Enterprise (DBE) attainment on Federal Transit Administration (FTA) funded projects is **0.12%**.

Cabarrus's DBE Goal Setting Methodology for FFY 2023-2025 explains Cabarrus County's goal-setting process and methods, public outreach process, and administration of the goal. Cabarrus County's overall goal must be based on demonstrable evidence of the availability of ready, willing and able DBEs relative to all businesses that are ready, willing and able to participate in DOT assisted contracts. 49 CFR §26.45 dictates a two-step process. The first step is to determine a base figure for the relative availability of DBEs. Once the base figure is determined, it is necessary to examine all the evidence available in Cabarrus County's jurisdiction to determine what adjustment to the base figure, if any, is necessary. As an extension of this process, Section 26.45 requires that state DOT's meet the "maximum feasible portion" of its overall DBE utilization goal through race-neutral means of facilitating race-neutral DBE participation.

Goal Methodology

Step 1 – Determination of a Base Figure

To establish Cabarrus County's base figure of the relative availability of DBEs to all comparable firms (DBE and Non-DBEs) available to propose on federally assisted contracting opportunities projected to be solicited during the goal period, Cabarrus County followed the two-step process federally prescribed for goal-setting in accordance with 49 CFR Part 26.45.

At the outset, Cabarrus County must determine the geographic market area ("GMA") in which it will search for DBEs and non-DBEs. Cabarrus County has defined its geographic market area as the state of North Carolina. To determine the geographic market area, we analyzed the ratio of the combined federal program dollars awarded to prime contractors and subcontractors in the state to the total federal program dollars awarded during FFY 2020. We found that the most significant amount of prime contract dollars (XX%) was awarded to contractors in this state and that when factoring in subcontracts, this geographic market area accounted for XX% of Cabarrus County's contracting opportunities.

Cabarrus County's FY2023 FTA Contracting Opportunities

Data Description	Total Program Awards	Amount Represented by GMA	GMA Market %
Geographic distribution of Prime Contract \$	\$32,759.00	\$32,759.00	100%
Geographic distribution of participating Subcontract \$	\$32,759.00	\$32,759.00	100%
Total GMA Market %	\$32,759.00	\$32,759.00	100%

Having determined its geographic market area, Cabarrus County projected the contracting opportunities that it will have during this goal period and defined the corresponding NAICS codes. Cabarrus County projects that the anticipated contracting opportunities for this goal period will fall within the NAICS code categories identified in Table 1.

Cabarrus County then searched for DBE and Non-DBE firms that perform the work associated with the relevant NAICS codes. This was accomplished by accessing the North Carolina Unified Certification Program (UCP) Directory of Certified DBE Firms and the 2019 U.S. Census Bureau County Business Patterns (CBP) Database. All efforts were made to use as close to identical NAICS codes as possible to ensure a “like-to-like” comparison. Although several DBEs have more than one NAICS code, we used only one such code per firm to avoid duplication.

Table 1: Projected Contracting Opportunities, NAICS Codes, and Relative Availability of Ready Willing and Able DBE Firms to All Firms

NAICS Code	Description	Number of Firms in GMA Per CBP Database	Number of DBE Firms in GMA
561621	Security Systems Services	4,971	14
423860	Transportation Equipment and Supplies	1,854	8
811111	General Automotive Repair	125,000	6
485310	Taxi and Ridesharing Services	7,233	17
541512	Computer Systems Design Services	14,881	146

To determine the relative availability of DBEs, Cabarrus County created a ratio wherein the numerator represents the number of ready, willing and able DBE firms and the denominator represents all firms, both DBEs and Non-DBEs, available in each work category.



For the numerator: North Carolina UCP DBE Database of Certified Firms in the geographic market area

For the denominator: 2019 U.S. Census Bureau's County Business Pattern Database (CBP)

As noted in Table 1, Cabarrus County identified 153,939 ready, willing and able firms in the NAICS codes for the projected federally-assisted contracting opportunities. In the federally prescribed formula below, this number is used as the denominator. The numerator was found by determining the number of ready, willing and able DBE certified firms within the same NAICS sub-sectors. For the purposes of this goal setting methodology, 196 firms currently DBE certified in North Carolina are considered ready, willing and able to perform work in the areas identified. The 196 ready, willing, and able DBE certified firms, divided by the 153,939 total number of all ready, willing, and able firms (DBEs and non-DBEs), yields a base figure of 0.12%.

$$\frac{\text{Formula} \quad \text{DBE (200)}}{\text{CBP (153,939)}} = 0.0012992 \times 100 = 0.12\%$$

Step 2 – Adjustment to Base Figure

Once the base figure is determined, Cabarrus County is required to examine all of the evidence available to determine what adjustment, if any, is necessary. Step 2 requires Cabarrus County to incorporate any available evidence that will improve the accuracy of the Step 1 base line goal calculations in order to determine the level of DBE participation that would occur absent the effects of discrimination. Cabarrus County assessed the impact of specific factors requiring narrow tailoring of the DBE Program. The following factors were considered in making the decision to adjust the overall DBE goal:

1. Past Participation

Cabarrus County has no past DBE participation, so no adjustment was made.

2. Other Related Evidence

No other evidence of the kind described in the regulations at 49 CFR 26.45(d)(2) was available to consider in determining whether an adjustment to the base figure is warranted.

Use of Race Conscious and Race Neutral Measures

Cabarrus County is new to the DBE process.

Public Participation

In establishing Cabarrus County's overall DBE goal, the County must provide for consultation and publication.

Consultation:

Cabarrus County is required to consult with minority, women's and general contractor groups, community organizations, and any other officials or organizations which may have information concerning the availability of the relative availability of DBEs, the effects of discrimination on DBE opportunities, or ways in which Cabarrus County can establish a level playing field for the participation of DBEs.

Accordingly, Cabarrus County took affirmative steps to both obtain general public feedback and to engage in scheduled, direct, interactive exchanges with interested stakeholders. As a starting point, Cabarrus County provided its proposed DBE Goal Setting Methodology for FFY 2023-2025 to the following agencies for their review.

- List Agencies

On July 17, 2023 Cabarrus County held a public meeting in an effort to give the community stakeholders an opportunity to provide feedback on the new DBE Goal Setting Methodology for FFY 2023-2025.

Publication:

Prior to submission to FTA, the proposed DBE goal and methodology was posted on Cabarrus County's website: www.cabarruscounty.us/Government/Departments/Human-Services/Transportation

and was shared on Cabarrus County's social media accounts. It was also posted and made available for public inspection during normal business hours at Cabarrus County's main office located at 1303 South Cannon Blvd Kannapolis, NC 28083. To obtain as much public feedback



as possible, Cabarrus County included a 30-day public comment period as part of its published notice.

Copy of Public Notice:

[Insert Copy of Public Notice]

PUBLIC HEARING NOTICE
Cabarrus County Transportation FTA DBE GOAL

This is to inform the public that a public hearing will be held on the proposed FY23-FY25 FTA DBE Goal to be submitted to the Federal Transit Administration. The public hearing will be held on July 17, 2023, at 6:30 p.m. in the Board of Commissioners meeting Chamber at 65 Church Street South, Concord NC, 28025

If reasonable accommodations are needed, please contact the ADA Coordinator at 704-920-2100 at least 48 hours prior to the public hearing or for a language translator please contact the ADA Coordinator at 704-920-2100 48 hours prior to the public meeting.

Cabarrus County Transportation (CCTS) in accordance with regulations of the U.S. Department of Transportation (DOT), 49 CFR Part 26, hereby announces its Fiscal Years 2023, 2024 and 2025 goal of 3.15% for DBE participation of contracts assisted by the Federal Transit Administration (FTA).

Interested parties are encouraged to submit comments to: Robert Bushey, Transportation Manager CCTS, 1303 South Cannon Blvd, Kannapolis NC, 28083. Comments may also be submitted to the Federal Transit Administration, Region IV, Attention: Dr. Yvette Taylor, 230 Peachtree, NW Suite 800 Atlanta, GA 30303.

AVISO DE AUDIENCIA PÚBLICA
Transporte del Condado de Cabarrus OBJETIVO DE FTA DBE

Esto es para informar al público que se llevará a cabo una audiencia pública sobre el objetivo propuesto de FY23-FY25 FTA DBE que se presentará a la Administración Federal de Tránsito. La audiencia pública se llevará a cabo el 17 de julio de 2023 a las 6:30 p.m. en la Cámara de reuniones de la Junta de Comisionados en 65 Church Street South, Concord NC, 28025

Si se necesitan adaptaciones razonables, comuníquese con el Coordinador de la ADA al 704-920-2100 al menos 48 horas antes de la audiencia pública o para un traductor de idiomas , comuníquese con el Coordinador de la ADA al 704-920-2100 48 horas antes de la reunión pública.

Cabarrus County Transportation (CCTS) de acuerdo con las regulaciones del Departamento de Transporte de los Estados Unidos (DOT), 49 CFR Parte 26, anuncia su meta para los años fiscales 2023, 2024 y 2025 de 3.15% para la participación de DBE de contratos asistidos por la Administración Federal de Tránsito (FTA).

Se alienta a las partes interesadas a enviar comentarios a: Robert Bushey, Gerente de Transporte CCTS, 1303 South Cannon Blvd, Kannapolis NC, 28083. Los comentarios también pueden enviarse a la Administración Federal de Tránsito, Región IV, Atención: Dr. Yvette Taylor, 230 Peachtree, NW Suite 800 Atlanta, GA 30303.

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items - No Action

SUBJECT:

Infrastructure and Asset Management -Camp T.N. Spencer Park Masterplan Discussion

BRIEF SUMMARY:

County staff will discuss the next steps of future planning for the Camp T.N. Spencer Park based on previous direction from the Board of Commissioners as well as recent discussions with the property owner.

REQUESTED ACTION:

Receive input.

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

Rodney Harris, Deputy County Manager
Londa Strong, Active Living and Parks Director
Bryon Haigler, Active Living and Parks Assistant Director
Kyle Bilafer, Assistant County Manager

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items - No Action

SUBJECT:

Planning & Development - Plot Plan/Survey and School Planning Capacity Report Discussion

BRIEF SUMMARY:

Staff would like to make the Commissioners aware of a disconnect in the development process and discuss incorporating a to scale plot plan, or survey for certain property conditions, as part of the permit application process.

Staff would like to receive feedback on the usefulness of the school planning capacity report that is distributed weekly.

REQUESTED ACTION:

Provide feedback.

EXPECTED LENGTH OF PRESENTATION:

10 Minutes

SUBMITTED BY:

Susie Morris, Planning and Development Director

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

BOC - Appointments to Boards and Committees

BRIEF SUMMARY:

The following appointment to Boards and Committees are recommended for July:

Appointment and Removal - Senior Center Advisory Council

Senior Center Advisory Council member Annette Swick resigned her position to move out of state.

At the June 19th Advisory Council Meeting the Council voted unanimously to recommend and appoint Karen Cobb to serve a 3-year.

Appointment and Removals - Juvenile Crime Prevention Council (JCPC)

During the June 21 regular meeting, the JCPC voted unanimously to recommend the appointment of Malisha Ross, LME/MCO Regional Director, as the Area Mental Health designee to complete the term vacated by Ms. LaShay Avery on June 2. Ms. Ross does not reside in Cabarrus County. An exception to the residency provision of the Appointment Policy will be needed.

The JCPC also voted unanimously to accept the resignation of Emily Coltrane as Chief Court Counselor Designee effective June 8. The Council then voted unanimously to recommend the appointment of Gayle Alston, Chief Court Counselor, as Court Counselor Designee to complete the unexpired term vacated by Ms. Coltrane. Ms. Alston does not reside in Cabarrus County. An exception to the residency provision of the Appointment Policy will be needed.

REQUESTED ACTION:

Provide information.

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 WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

County Manager - Easement for Duke Energy on Kannapolis Middle School Property

BRIEF SUMMARY:

Kannapolis City Schools and Duke Energy have requested an easement on the middle school property to install an electric charging station for an electric bus. The bus was purchased with funding received from Duke Energy, North Carolina Department of Public Instruction (NC DPI) and a grant from North Carolina Department of Environmental Quality (NCDEQ). Attached are maps showing the general locations of the existing lines and the planned installations. The easement language is designed to be flexible for the installation. The installed lines will be the centerline for the easement.

REQUESTED ACTION:

Motion to grant an easement to Duke Energy on the Kannapolis Middle School Property and authorize the County Manager to execute the Easement Agreement on behalf of Cabarrus County, subject to review or revisions by the County Attorney.

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

Kelly Sifford, AICP
Assistant County Manager

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▣ Easement agreement
- ▣ Map

Prepared by: Duke Energy Carolinas, LLC
Return to: Duke Energy Carolinas, LLC
Attn: Will Johnson
474 Charlie Watts Rd.
Maxton, North Carolina 28364

Parcel #56122900100000

EASEMENT

State of North Carolina
County of Cabarrus

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

Grantor, for and in consideration of the sum of One and 00/100 Dollar (\$1.00) and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, does hereby grant unto Grantee a perpetual and non-exclusive easement, to construct, reconstruct, operate, patrol, maintain, repair, replace, relocate, add to, modify, and remove electric and communication lines including, but not limited to, all necessary supporting structures, and all other appurtenant apparatus and equipment for the transmission and distribution of electrical energy, and for technological purposes related to the operation of the electric facilities and for the communication purposes of Incumbent Local Exchange Carriers (collectively, "**Facilities**"). Grantor is the owner of that certain property described in that instrument recorded in **Deed Book 4417, Page 94**, Cabarrus County Register of Deeds ("**Property**"). The Facilities may be both overhead and underground and located in, upon, over, along, under, through, and across a portion of the Property within an easement area described as follows: A strip of land thirty feet (30') in uniform width for the overhead portion of said Facilities and a strip of land twenty feet (20') in uniform width for the underground portion of said Facilities, lying equidistant on both sides of a centerline, which centerline shall be established by the center of the Facilities as installed, along with an area ten feet (10') wide on all sides of the foundation of any Grantee enclosure/transformer, vault and/or manhole, (hereinafter referred to as the "Easement Area").

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

1. Grantee shall have the right of ingress and egress over the Easement Area, Property, and any adjoining lands now owned or hereinafter acquired by Grantor (using lanes, driveways, and adjoining public roads where practical as determined by Grantee).
2. Grantee shall have the right to trim, cut down, and remove from the Easement Area, at any time or times and using

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

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

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

IN WITNESS WHEREOF, Grantor has signed this Easement under seal effective this ____ day of _____, 20_____.

CABARRUS COUNTY

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

_____(SEAL)
Michael K. Downs, County Manager

STATE OF _____

COUNTY OF _____

I, _____, a Notary Public of _____ County, State of _____, certify that Michael K. Downs, as County Manager of **CABARRUS COUNTY**, a body politic and political subdivision of the state of North Carolina, personally appeared before me this day and acknowledged the due execution of the foregoing EASEMENT.

Witness my hand and notarial seal, this ____ day of _____, 20_____.



Notary Public: _____

Commission expires: _____



B & W Carpet Care

Kannapolis Middle School

Proposed 3 Phase Transformer to serve Bus chargers
KVA TO Be Determined

Existing 3 Phase UG Primary

FOR PLANNING PURPOSES ONLY

Complete Load information needed prior to Final Design and Construction

Google Earth

CABARRUS COUNTY**BOARD OF COMMISSIONERS
WORK SESSION****July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Department of Human Services - Approval of Medicaid Expansion Positions

BRIEF SUMMARY:

The Department of Human Services (DHS) received two funding allocations, one for \$139,193 and the other for \$561,659, for a total of \$700,852 for implementation of Medicaid Expansion. This funding has been appropriated in the FY2024 department budget and will be used to hire thirty (30) additional Medicaid staff. DHS can leverage an additional 75% reimbursement on the use of these funds or an additional \$525,639 in funding bringing the total available funding to \$1,226,491. The funds must be used for startup costs for expanding Medicaid. DHS anticipates an additional 15,583 to 17,794 potential new Medicaid eligibles with expansion.

REQUESTED ACTION:

Motion to approve thirty full time positions within the Department of Human Services.

EXPECTED LENGTH OF PRESENTATION:

10 Minutes

SUBMITTED BY:

Karen Calhoun, Human Services Director

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- Presentation

Medicaid Expansion

Department of Human Services

July 10, 2023



CABARRUS COUNTY
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Overview

- S.L. 2023-7/HB 76 signed into law in March 2023, allows N.C. to provide Medicaid coverage to individuals that would otherwise not be eligible due to income, and to advance funding to support counties with implementation to expand Medicaid (*State FY24 budget must be passed*).
- Medicaid is administered by each state and follows rules of the federal government under the direction of the Center for Medicare and Medicaid Services.
- Previously, Medicaid had a gap in coverage. Services were only provided for pregnant women, parents or caretaker relatives, those 65 and older, the blind and disabled and children up to the age of 18.
- Adults in the 19 to 64 age range who did not meet that criteria were not eligible.
- Medicaid Expansion allows the same ways of getting care as existing Medicaid.
- Recipients will have the same comprehensive benefits and copays as other non-disabled adults in



Eligibility

- ❑ N.C. anticipates over 600,000 additional Medicaid recipients will gain access to health care coverage under Expansion.
- ❑ Cabarrus County anticipates an additional 15,583 to 17,794 recipients under Expansion. We currently average 55,688 Medicaid recipients.
- ❑ Medicaid Expansion in N.C. increases the eligible population to all adults ages 19 to 64 who have incomes up to 138% of the Federal Poverty Level.
- ❑ Single adults 19 to 64 who have incomes of approximately \$20k/year
- ❑ Parents with low incomes for a family of three, an annual income below about \$34k/year.
- ❑ The federal poverty level for 2023 is \$13,950 for one individual and \$27,750 for a family of four.
- ❑ Prior to Expansion, the cutoff for parents was approximately \$8k/year.

Other Program Considerations

- ❑ With Continuous Coverage Unwinding after 3 years under the federal Public Health Emergency that allowed auto extension of benefits, counties are required to resume recertifying benefits.
- ❑ Some beneficiaries may lose coverage or see a reduction in benefits based on pre-expansion rules. This will result in increased workloads for counties.
- ❑ Counties are facing challenges with building staff capacity in order to maintain program requirements, existing caseload demands, and be ready for Expansion.
- ❑ DHB that oversees Medicaid has implemented flexibilities and increased automation to assist counties.
- ❑ Cabarrus County is currently going through a 10-month audit that began in May. The Recipient Eligibility Determination Audit (REDA) reviews 200 cases for Medicaid Accuracy Standards requiring staff time to pull cases, review, submit corrections, and train.



More Program Considerations

Lawsuit settlement in 2023 of Franklin et al. v. Kinsley, formerly known as Hawkins et al. v. Cohen, a federal lawsuit filed in 2017. This changed the way Medicaid is administered to beneficiaries and staff are learning new processes.

- ❑ This settlement made DHB change the procedures, forms and notices for redetermining Medicaid eligibility.
- ❑ Counties had to create a centralized voicemail for beneficiaries to leave messages and have access to Medicaid 24/7. The staff have five days to return these voicemails.
- ❑ Counties had to create a centralized email for each Medicaid program for beneficiaries to return verifications for their case.
- ❑ Class counsel obtains a percentage of Medicaid cases reduced or terminated each quarter, which led to the reopening of 90 Medicaid cases for Cabarrus County in June.

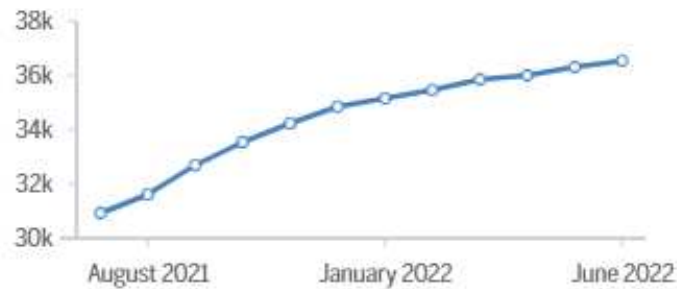
Current Staff and Caseloads

Month	Cases	Recipients
July	36,796	52,837
Aug.	37,156	53,199
Sept.	37,426	53,547
Oct.	37,694	53,769
Nov.	37,962	54,050
Dec.	38,297	54,428
Jan.	38,972	55,088
Feb.	38,655	55,477
March	38,939	55,758
April	38,491	55,688
May	38,741	56,045

Medicaid Staff Workload		
Medicaid Recipients	56,045	
Medicaid Cases	38,741	
Direct Workers	59	
Medicaid Type	Annual Caseload/worker	Monthly Caseload/worker
LTC/SA Apps	228	19
LTC/SA Reviews	276	23
PLA Apps	554	46
PLA Reviews	1,065	89
F&C Apps	459	38
F&C Reviews	1,740	145

Medicaid Caseload Trends - 2022

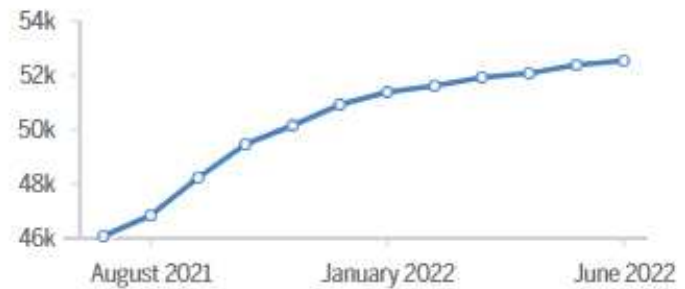
ES-Medicaid caseload



36,556

Measure in June 2022

ES-Medicaid total recipient count



52,575

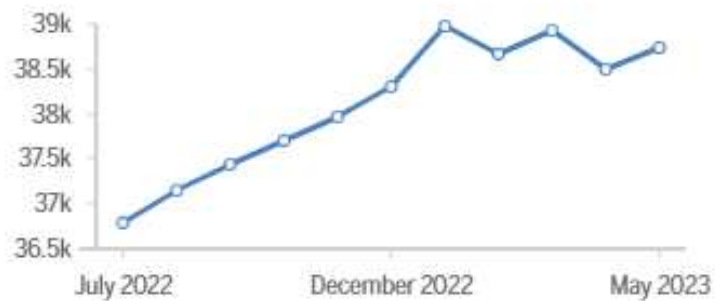
Measure in June 2022



CABARRUS COUNTY
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Medicaid Caseload Trends - 2023

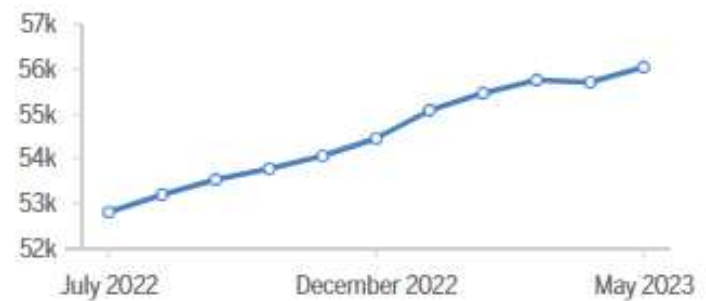
ES-Medicaid caseload



38,741

Measure in May 2023

ES-Medicaid total recipient count



56,045

Measure in May 2023



CABARRUS COUNTY
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Medicaid Expansion Positions Request

Title	# Staff	Salary	Fringe	Equipment	Total Cost
IMC I	4	\$145,796	\$81,884	\$24,620	\$252,300
IMC II	21	\$802,935	\$441,987	\$129,255	\$1,374,177
IMC III-Lead	2	\$84,366	\$40,222	\$12,310	\$136,898
IM Supervisor	3	\$139,659	\$70,965	\$18,465	\$229,089
Total	30	\$1,172,756	\$635,058	\$184,650	\$1,992,464

Startup Funding Allocations received:

\$139,193

\$561,659

\$700,852

Can leverage 75% or \$525,639 for total funding available of **\$1,226,491**



CABARRUS COUNTY
America Thrives Here

Questions



CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Department of Human Services - Energy Programs Outreach Plan

BRIEF SUMMARY:

The plan is designed to assure that eligible households are made aware of the assistance available through the Energy Programs.

REQUESTED ACTION:

Motion to approve plan.

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

Lora Lipe, Economic Support Services Administrator

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▮ Energy Programs Outreach Plan

ENERGY PROGRAMS OUTREACH PLAN

The Low-Income Home Energy Assistance Program (LIHEAP) is a federally funded block grant program that is comprised of three different programs - Crisis Intervention Program (CIP), Low Income Energy Assistance Program (LIEAP) and Weatherization. There are also non-Federal Crisis Intervention Programs - Energy Neighbor, Share the Warmth, Wake Electric Round Up, and Helping Each Member Cope.

To maximize the success of this program, outreach to county residents through key community partner stakeholders, each county department of social services is required to develop and implement an Energy Program Outreach Plan (EPOP). This plan is a framework to assure that eligible households are made aware of the assistance available through these programs.

The county director and/or his/her designee is required to develop the EPOP, which addresses outreach and application activities related to the Energy Programs. The Outreach Plan is due to North Carolina Department of Health and Human Services (NCDHHS) by July 24, 2023.

Each county must form an outreach planning committee that creates the opportunity for county level collaboration to discuss and plan how to effectively reach county residents to inform them of the services provided by the energy programs. The committee should meet at least twice yearly; September for outreach planning related to LIEAP and April to review the outcomes related to LIEAP and to plan for outreach activities for summer weather. Energy Assistance Outreach Plan

Answer all questions below. Address CIP, non-Federal CIP, and LIEAP where appropriate:

COMMITTEE MEMBERSHIP

The Director of Social Services should engage a number of various community partners such as Vendors, Housing Authority, Public Libraries, Public School System/Local Colleges/Head Start, Legal Services, Meals on Wheels, Media, Public Health/Health Centers, Churches, Food Banks, Councils on Aging/Senior Centers, Community based Indian organizations, Volunteer Programs, Vocational Rehabilitation Offices, and Transportation, services, etc.

1. Provide a list of committee members and their agencies.

City of Concord - Tammy Linn; Dominion Energy - Gina Lipscomb; NC Works - Denisha Nesbitt

Energy Distributors- Gina McCoy; Duke Energy- Jamel Haynes; Meals On Wheels - Kim Strong

Senior Center - Teresa Kiser; Cabarrus County Health Alliance - Marcella Beam

Veterans Services - Tony Miller; Prosperity Unlimited, Inc. - Louise Mack

Salisbury-Rowan Community Action Agency, Inc. - Sherry Tillmon; Cooperative Christian Ministry(CCM) - Roxanna Brooks; Concord Housing Authority - Princess Gray;

Vocational Rehabilitation - Stephen Chmielewski; Aya House- Dennis Brown; Salvation Army- Lt. Devin & Lara Sassano; Hope Haven Inc.- Scott Littlejohn; Multiply Church- Gwen Stowers; Opportunity House- Laura Tolbert; City of Kannapolis Housing Assistance- Sherry Gordon; Senior Living Apartments: Camilla Hill Apartments, Logan Gardens Apartments, Crescent Heights Apartments, Honeycreek Senior Apartments, Prosperity Ridge Apartments, and Westbury Apartments.

-
-
2. Provide potential meeting dates, times, locations, as well as agenda topics.

October 11, 2023 at 9:30am and April 24, 2024 at 9:30am at Cabarrus County DHS or by Microsoft Teams. Agenda topics - Provide program fliers & brochures provided by the State; discuss eligibility criteria, outreach ideas and suggestions, energy season wrap-up.

Define how DSS/DHS will work with the committee as well as any other agencies to collaborate regarding the Energy Program and how outreach will be provided to the citizens in your area.

DHS will provide informational fliers for distribution and posting and offer senior housing agencies the option of having LIEAP applications taken on site. Communication with energy providers and community partners and various outlets through Cabarrus County Communications Dept.

1. What is the process for referring customers? What marketing tools or items will be used (please provide a copy of your previous marketing materials & how you plan to enhance those in the future)?
Referrals are made directly to the Crisis unit. Marketing tools include distribution of fliers, posting on Channel 22, County website and Facebook page, article in Journey magazine. Vendors are given informational fliers for distribution/posting. Continue to work with Communication and IT Dept. to improve fliers & marketing strategy.
2. What strategy does the county have, to continue collaborative efforts with community partners to complete outreach activities to target potential eligible households including individuals and families?
Information given at community and partnership meetings, post in lobby and throughout agency sharing information with staff and other divisions within Human Services, encourage community partners to share information with anyone that can benefit from the energy programs.
3. What additional activities will be conducted to target households with members with children under 5, age 60 and over and disabled?
Information will be given for distribution and announcement to senior housing apartments, Cabarrus Senior Center & Lunch Plus Clubs. Will also share with WIC, Cabarrus Health Alliance, Daycare Providers, Dream Center, Veteran's Services, County Transportation provider & Social Security Admin.

Media involvement is vital to the success to outreach activities. How will your county utilize media such as newspapers, social media, radio and television stations to publicize the Energy Programs?

Cabarrus County communications department will assist the agency with preparation of outreach materials, messaging and distribution of the information to be publicized.

1. Provide a list of media outlets that will be used as well as timeframes in which they will be contacted (provide examples of how the county can enhance these efforts):

WBTV, WSOC, Journey Senior Magazine, Independent Tribune, Charlotte Observer, News 14,

Cabarrus County Website, Channel 22, Fox Charlotte, County Facebook Page and Social Media

outlets will be contacted by September 22, 2023.

ORGANIZATIONAL STRUCTURE:

Counties are required to provide application processes for CIP, non-Federal CIP programs, and/or LIEAP. This information must be reported to the NCDHHS annually.

1. Provide hours of operation, location and whether the programs are in house or contracted out. If your agency contracts out to other agencies attach the contract(s).

Hours of operation - Mon. thru Fri.. 8:00AM to 5:00PM at Cabarrus County Dept. of Human Services, 1303 South Cannon Blvd, Kannapolis, NC 28083 and also at the Dream Center at 280 Concord Pkwy S, Concord, NC 28027. Programs are in house.

BEST PRACTICES:

Best practices are a method or technique that has been generally accepted as superior to any alternatives because it produces results. Best practices are essential to the program.

1. If your county has gone above and beyond what is listed on this form please provide this information below:

Clients with unusually high energy bills are referred to the Cabarrus County Planning and Development Services Department for the Weatherization Program in order to make their home more efficient and reduce costs.
Clients not eligible for assistance are screened for other programs provided by Cabarrus County.

2. Any additional comments or activities for CIP, non-Federal CIP, and/or LIEAP:

CONTACT INFORMATION:

Your contact information is essential to the success of the Energy Programs. Please complete the following information.

Name: Christina Goodman

Address: 1303 S. Cannon Blvd. Kannapolis, NC 28083

Telephone: 704-920-1430

Email: clgoodman@cabarruscounty.us

Please indicate which program:

☐ LIEAP

☐ CIP

This plan must be approved by the local Board of Social Services/Human Services Board or local agency governing body prior to submission. Refer to the latest Dear County Director Letter for instructions on how to submit this document to the North Carolina State office.

Board of Social Services/Human Services or governing body Signature

Date

Director's Signature

Karen B. Calhoun

Date

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Finance - Occupancy Tax Late Penalty Waiver Requests

BRIEF SUMMARY:

The following three hotels are asking for a waiver on occupancy tax late fees and interest ("penalty") associated with late payments and late filings.

Sleep in Concord -Was late with their February Occupancy Tax. Penalties of \$989.18. Last late payment was 2017.

Uptown Suites Concord - Was late with their March Occupancy Tax. Penalties of \$991.62. Last late payment was 2017.

Home Town Suites Kannapolis - Was late with their March Occupancy Tax. Penalties of \$523.39. Have never been late before.

REQUESTED ACTION:

Motion to waive the following Occupancy Tax late penalties and interest for Sleep Inn Concord of \$989.19, Upton Suites Concord of \$991.62 and Home Town Suites Kannapolis of \$523.39 pursuant to G.S. 153A-155(e).

EXPECTED LENGTH OF PRESENTATION:

1 Minute

SUBMITTED BY:

James Howden, Finance Director

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Infrastructure and Asset Management -Cabarrus County Behavioral Health Center Project Update

BRIEF SUMMARY:

County staff to provide update on project

REQUESTED ACTION:

Receive input.

EXPECTED LENGTH OF PRESENTATION:

10 Minutes

SUBMITTED BY:

Kyle Bilafer, Assistant County Manager

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Infrastructure and Asset Management -Vietnam Veterans Park Land Lease Amendment

BRIEF SUMMARY:

County staff to present the second amendment to the original lease with the City of Kannapolis for the land that houses Vietnam Veterans Park. The amendment is a three (3) year extension.

REQUESTED ACTION:

Motion to approve the Lease Agreement between Cabarrus County and City of Kannapolis for the lease of PIN 5611199578, which is the land that houses Vietnam Veterans Park and authorize the County Manager to execute the Agreement on behalf of Cabarrus County, subject to review or revisions by the County Attorney.

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

Kyle Bilafer, Assistant County Manager

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▣ VVP Land Lease Second Amendment

**NORTH CAROLINA
CABARRUS COUNTY**

**SECOND AMENDMENT
TO LEASE AGREEMENT**

THIS SECOND AMENDMENT TO LEASE AGREEMENT (hereinafter “Amendment”) is made and entered into this the _____ day of _____ 2023 by and between the County of Cabarrus (hereinafter “County”) and the City of Kannapolis, (hereinafter “City”). The County and City are hereinafter sometimes referred to as the “Party” or the “Parties”.

WITNESSETH:

WHEREAS, Parties entered into a Lease Agreement (hereinafter “Lease”) on or about August 23, 1999, pursuant to North Carolina General Statutes 160A-274 and 153A-165 providing for the lease and joint use of governmental property, which was amended by a First Amendment on or about July 10, 2020; and,

WHEREAS, the Parties now desire to again amend the Lease in accordance with the terms agreements and provisions hereinafter provided.

NOW THEREFORE, upon valuable consideration, the receipt and sufficiency is hereby acknowledged by each Party, and in performance of the premises contained herein, the Parties agree as follows:

1. **Recitals.** The recitals contained above are incorporated herein as a part of this Amendment.
2. **Term.** The Parties agrees that the Lease Term shall be extended for an additional three (3) years beginning September 1, 2023 and ending at midnight August 31, 2026.
3. **Ratification.** Except as specifically herein amended, all terms, provisions, conditions, and exhibits contained in the Lease, as amended, are hereby confirmed, ratified and restated and shall remain unmodified and in full force and effect. In the event that any provisions of this Second Amendment shall conflict with the terms, provisions and conditions of the Lease, the terms, provisions and conditions of this Second Amendment shall govern and control.

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

COUNTY OF CABARRUS

By: _____
Chairman

ATTEST:

Clerk

(SEAL)

CITY OF KANNAPOLIS

By: _____
Milton D. Hinnant, Mayor

ATTEST:

Bridgette Bell, MMC, NCCMC
City Clerk

(SEAL)

STATE OF NORTH CAROLINA

COUNTY OF _____

I, _____, a Notary Public of _____
County and aforesaid State certify that Bridgette Bell, City Clerk to the City of Kannapolis, personally
came before me this day and acknowledged that she is City Clerk to the City of Kannapolis and that by
authority duly given and as the act of the City, the foregoing instrument was signed by its name by Milton
D. Hinnant, Mayor of the City of Kannapolis, sealed with the City Seal and attested by herself as its City
Clerk.

Witness my hand and official stamp or seal this ____ day of _____, 2023.

Notary Public

(SEAL)

My Commission expires: _____

STATE OF NORTH CAROLINA

COUNTY OF _____

I, _____, a Notary Public of _____
County and aforesaid State certify that Clerk to the Cabarrus County Board of Commissioners, personally
came before me this day and acknowledged that he/she is Clerk to the Cabarrus County Board of
Commissioners and that by authority duly given and as the act of the Board, the foregoing instrument was
signed by its name by _____, Chairman of the Cabarrus County Board of
Commissioners, sealed with the County Seal and attested by its Clerk.

Witness my hand and official stamp or seal this ____ day of _____, 2023.

Notary Public

(SEAL)

My Commission expires: _____

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Juvenile Crime Prevention Council - Allocation of FY 2023-24 Funding

BRIEF SUMMARY:

The County receives funding from the Department of Public Safety (DPS) annually and passes the majority of funds to Juvenile Crime Prevention Council (JCPC) approved sub-recipients. The total amount of funds to be received from DPS for FY 2023-24 is \$459,927. The JCPC FY 2023-24 Funding Plan, which includes \$15,500 for administrative expenses and \$444,527 awarded for youth programs is presented to the Board for approval.

REQUESTED ACTION:

Motion to Suspend the Rules of Procedure.

Motion to approve the JCPC FY 2023-24 County Funding Plan.

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

James Howden, Finance Director

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▢ Funding Plan

Cabarrus County

NC DPS - Community Programs - County Funding Plan

Available Funds: \$ \$459,927 Local Match: \$ \$167,935 Rate: 30%

DPS JCPC funds must be committed with a Program Agreement submitted in NC Allies and electronically signed by authorized officials.

#	Program Provider	DPS-JCPC Funding	LOCAL FUNDING			OTHER State/Federal	OTHER Funds	Total	% Non DPS-JCPC Program Revenues
			County Cash Match	Local Cash Match	Local In-Kind				
1	JCPC Administration	\$15,500						\$15,500	
2	Conflict Resolution Center, Inc. (Teen Court)	\$76,177			\$39,566			\$115,743	34%
3	Aspire Youth and Family, Inc. (Kids at Work)	\$60,000			\$24,314			\$84,314	29%
4	Transforming Youth Movement, Inc. (Mentoring)	\$54,500			\$17,280			\$71,780	24%
5	Transforming Youth Movement, Inc. (Get Hired)	\$59,840			\$18,720			\$78,560	24%
6	Transforming Youth Movement, Inc. (Restitution and Community Service)	\$66,000			\$24,000			\$90,000	27%
7	Rowan Youth Services Bureau, Inc. (Sex Offender Evaluations)	\$8,167		\$33	\$3,142			\$11,342	28%
8	Youth Development Initiatives (YDI Family Life Skills)	\$52,601			\$18,000			\$70,601	25%
9	Youth Development Initiatives (YDI Vocational and Career Development)	\$21,393			\$8,000			\$29,393	27%
10	Youth Style Fitness, Inc (Holistic Fitness)	\$45,749			\$14,880			\$60,629	25%
11									
12									
13									
14									
15									
16									
17									
18									
TOTALS:		\$459,927		\$33	\$167,902			\$627,862	27%

The above plan was derived through a planning process by the Cabarrus County 2023-2024 Juvenile Crime Prevention Council and represents the County's Plan for use of these funds in FY

Amount of Unallocated Funds _____

Amount of funds reverted back to DPS _____

Discretionary Funds added _____

Nyan E. G. 7/5/2023
Chairperson, Juvenile Crime Prevention Council (Date)

check type ☐ initial plan ☐ update ☐ final

DPS Use Only	
Reviewed by <u>[Signature]</u>	Date <u>6/26/23</u>
Reviewed by <u>[Signature]</u>	Date <u>6-26-23</u>
Verified by _____	Date _____

Chairperson, Board of County Commissioners (Date)
or County Finance Officer

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 4040 Mills Circle, Further Identified as PIN 5651-14-2940

BRIEF SUMMARY:

The City of Concord received a request for water service in Area A of the Central Area Land Use Plan Interlocal Agreement. The request is from Quicksilver Custom Builders, LLC for property located at 4040 Mills Circle, further Identified as PIN 5651-14-2940. The property will be developed with one single-family home. Pursuant to the CALUP ILA, all requests for service in Area A must be jointly approved by the Cabarrus County Board of Commissioners and Concord City Council.

REQUESTED ACTION:

Motion to consider approving the request for the City of Concord to provide water service at 4040 Mills Circle, further Identified as PIN 5651-14-2940 and to authorize County Manager to execute Agreement subject to review and approval by the County Attorney.

EXPECTED LENGTH OF PRESENTATION:

1 Minute

SUBMITTED BY:

Susie Morris, Planning & Development Director

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▣ Concord Application
- ▣ Area Map
- ▣ Amendment Agreement

City of Concord, North Carolina
Preliminary Application – Extension of Concord Utilities outside Concord City Limits
(Please type or print in black ink)

1. Name of development: N/A
2. Name and address of owner(s)/developer(s): Contractor - Quicksilver Custom Builders Inc.
Casey Honeycutt 2835 Ross Lee Dr. Concord, NC 28025
3. Owner(s)/developer(s) telephone: 980-621-5894 Fax: _____
4. Name and address of surveyor/engineer: N/A
5. Surveyor/engineer's telephone: _____ Fax: _____
6. Name, telephone and fax number, and address of agent (if any): _____
7. Name and address of person to whom comments should be sent: Casey Honeycutt
2835 Ross Lee Dr. Concord, NC 28025
8. Telephone number of person to whom comments should be sent: 980-621-5894
Fax: _____
9. Location of property: 4040 Mills Cir. Concord, NC 28025
10. Cabarrus County P.I.N.#: 565114294
11. Current zoning classification: AO
12. Total acres: 3.85 Total lots proposed: 1
13. Brief Description of development: _____
14. Proposed Construction Schedule Framing New Single family home now. Home to be completed
by November 1st
15. Type of Service requested New 3/4" Water Service

04/11/2023
Date

Casey K. Honeycutt
Signature of Owner/Agent

Casey Honeycutt
Name (printed)

NOTE: By affixing his or her signature hereto, the owner/developer acknowledges understanding of and agreement to comply with all provisions of the Concord City Code section 62.

Staff Use Only:

Received by: _____ Date: _____

4040 Mills Circle



400 200 0 400 Feet

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 2023

STATE OF NORTH CAROLINA

COUNTY OF CABARRUS

AD HOC MODIFICATION OF CITY
OF THE CONCORD-CABARRUS COUNTY
INTERLOCAL AGREEMENT REGARDING
THE CENTRAL AREA PLAN
(4040 Mills Circle – PIN 5651-14-2940)

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

RECITALS

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

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

TERMS

1. Concord agrees to provide water utility services under its normal and customary terms and conditions to the property located at 4040 Mills Circle – PIN 5651-14-2940.
2. Except as specifically changed by this Modification, the provisions of the Interlocal Agreement shall remain in full force and effect.

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

CITY OF CONCORD

By: _____
Lloyd Payne, City Manager

Date: _____

CABARRUS COUNTY

By: _____
Mike Downs, County Manager

Date: _____

DRAFT

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 3868 Highway 200, Further Identified as PIN 5547-87-8632

BRIEF SUMMARY:

The City of Concord received a request for water service in Area A of the Central Area Land Use Plan Interlocal Agreement. The request is from Allen Montgomery for property located at 3868 Highway 200, further Identified as PIN 5547-87-8632. The property will be developed with one single-family home. Pursuant to the CALUP ILA, all requests for service in Area A must be jointly approved by the Cabarrus County Board of Commissioners and Concord City Council.

REQUESTED ACTION:

Motion to consider approving the request for the City of Concord to provide water service at 3868 Highway 200, further Identified as PIN 5547-87-8632 and to authorize County Manager to execute Agreement subject to review and approval by the County Attorney.

EXPECTED LENGTH OF PRESENTATION:

1 Minute

SUBMITTED BY:

Susie Morris, Planning and Development Director

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▣ Concord Application
- ▣ Area Map
- ▣ Agreement Amendment

To Whom it may Concern:

My wife and I are planning to build a house located at 3868 Hwy 200 in Concord. We would like to tap into the water that runs in front of our property. There are houses on either side of us that are tap on to the water line.

I am attaching the application.

Please contact me if you have any questions.

Allen S. Montgomery

704-699-0591

Preliminary Application – Extension of Concord Utilities outside Concord City Limits
(Please type or print in black ink)

1. Name of development: No development single house
2. Name and address of owner(s)/developer(s): Allen Montgomery
3868 Hwy 200 Concord NC 28025
3. Owner(s)/developer(s) telephone: 704-699-0591 Email PastorAllenSmontgomery@gmail.com
Fax: _____
4. Name and address of surveyor/engineer: _____

5. Surveyor/engineer's telephone: _____ Fax: _____
6. Name, telephone and fax number, and address of agent (if any): _____

7. Name and address of person to whom comments should be sent: Allen Montgomery
P.O. Box 1026 Concord NC 28026

8. Telephone number of person to whom comments should be sent: 704-699-0591
Fax: _____

9. Location of property: 3868 Hwy 200
10. Cabarrus County P.I.N.#: 55478786320000
11. Current zoning classification: A0 Conventional
12. Total acres: 3.5 Total lots proposed: 1
13. Brief Description of development: Building one house

14. Proposed Construction Schedule Spring 2023

15. Type of Service requested Water

4/9/2023
Date

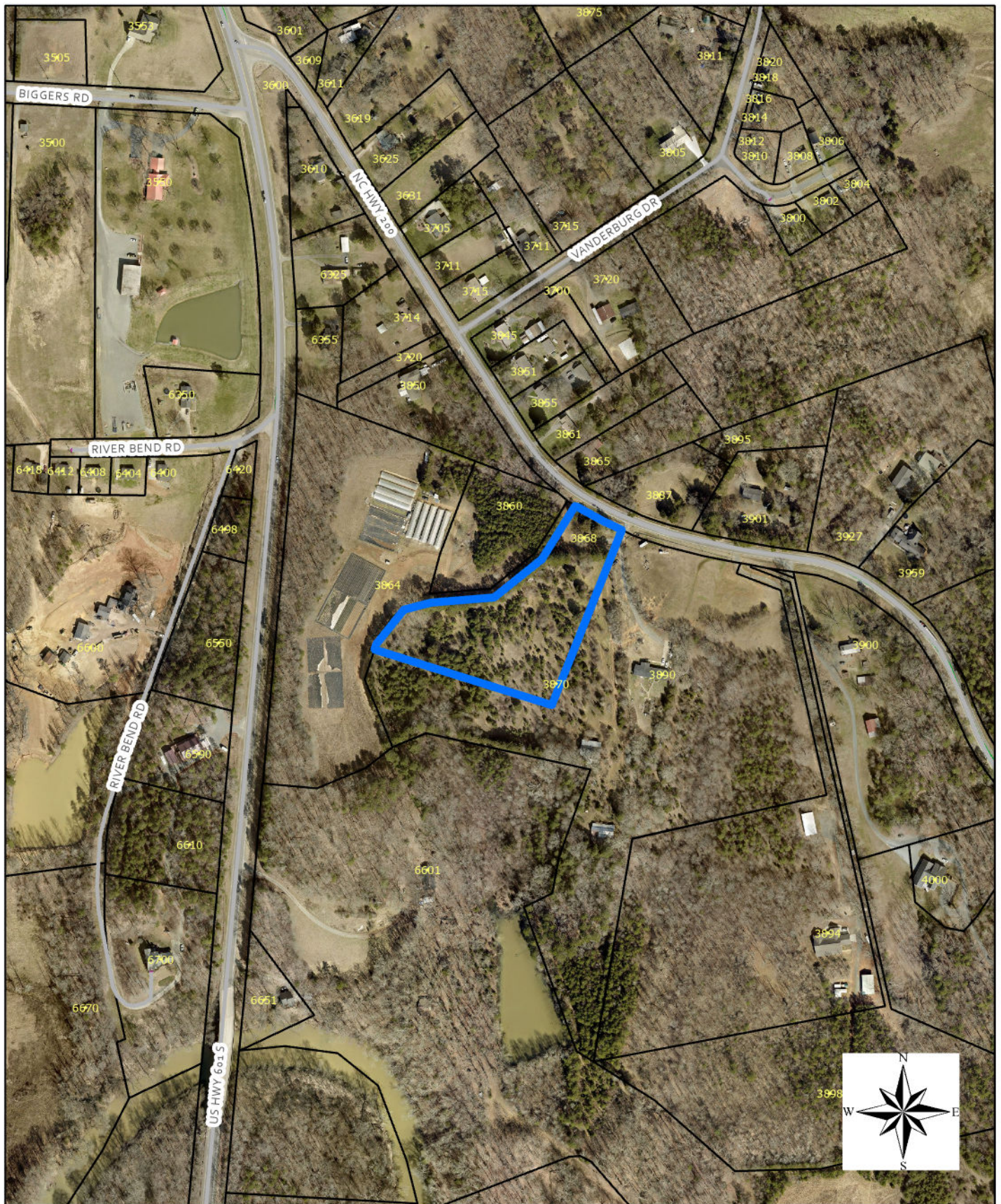
Allen S. Montgomery
Signature of Owner/Agent

Allen S. Montgomery
Name (printed)

NOTE: By affixing his or her signature hereto, the owner/developer acknowledges understanding of and agreement to comply with all provisions of the Concord City Code section 62.

Staff Use Only:	
Received by: _____	Date: _____

3868 HWY 200



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400 200 0 400 Feet

STATE OF NORTH CAROLINA

COUNTY OF CABARRUS

AD HOC MODIFICATION OF CITY
OF THE CONCORD-CABARRUS COUNTY
INTERLOCAL AGREEMENT REGARDING
THE CENTRAL AREA PLAN
(3868 Highway 200 – PIN 5547-87-8632)

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

RECITALS

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

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

TERMS

1. Concord agrees to provide water utility services under its normal and customary terms and conditions to the property located at 3868 Highway 200 – PIN 5547-87-8632.
2. Except as specifically changed by this Modification, the provisions of the Interlocal Agreement shall remain in full force and effect.

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

CITY OF CONCORD

By: _____
Lloyd Payne, City Manager

Date: _____

CABARRUS COUNTY

By: _____
Mike Downs, County Manager

Date: _____

DRAFT

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Legal - Central Area Land Use Plan Interlocal Agreement Update

BRIEF SUMMARY:

Cabarrus County and the City of Concord adopted an Interlocal Agreement in 2008 as part of the Central Area Land Use Plan process. The agreement expires on June 29, 2023.

County and city staff have been working together to update the terms of the agreement. The revised agreement is ready for the Board of Commissioners to review and consider.

If approved, the new agreement would expire June 29, 2038.

REQUESTED ACTION:

Motion to approve the revised Central Area Plan Interlocal Agreement.

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

Susie Morris, Planning & Development Director
Rich Koch, County Attorney

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▢ Amended Agreement
- ▢ Map

This INTERLOCAL AGREEMENT REGARDING THE CENTRAL AREA PLAN (“Interlocal Agreement”), is entered into effective June 29, 2008 by, between and among the CITY OF CONCORD (“Concord”), a North Carolina municipal corporation and CABARRUS COUNTY (“County”), a body politic and political subdivision of the State of North Carolina, THE WATER AND SEWER DISTRICT OF CABARRUS COUNTY, (“District”), a water and sewer district formed pursuant to N.C. Gen. Stat. Chapter 162A.

PREMISES

1. The City, the County and the District have been involved in lawsuits (the “Litigation”) that are more particularly identified as the cases of Craft Development, LLC, et v City of Concord, et al, 03 CVS 2400, and Morrison et al v City of Concord, 03 CVS 2462 (Cabarrus County Superior Court).
2. All of the claims in the Litigation have been settled, dismissed or otherwise resolved, with the exception of the claims by the City against the County and the District, and the claims of the County and the District against the City.
3. On or about December 6, 2004, The City and the County entered into a Memorandum of Understanding (the “2004 MOU”), in which the City and County set out a framework by which they hoped to resolve the remaining claims in the Litigation and to settle any remaining differences between them pertaining to such claims.
4. On January 21, 2006, the parties reached an agreement (the “Agreement”) to resolve all of the differences and disputes between them that were the subject of the Litigation.
5. This Agreement was attached to and incorporated into a Consent Judgement dated January 23, 2006 and signed by Superior Court Judge Clarence E. Horton, Jr.
6. The parties subsequently amended that Agreement by a document termed the “Amended Agreement,” which was attached to and incorporated into an “Amended Consent Judgment” dated October 30, 2007 and signed by Superior Court Judge W. Erwin Spainhour.
7. In the Amended Agreement, the parties agreed to modify the Agreement to divide Concord’s Utility Service Area into two subareas and set forth temporary rules in each subarea with regard to the provision of utilities to property in the Utility Service Area while they worked on a land use plan known as the “Central Area Plan” (also referred to as “CAP”). The CAP is presently in draft form and has not yet been approved by the parties.
8. This Amended Agreement contained an expiration date of June 30, 2008.
9. The parties entered into a new agreement regarding the Central Area Plan and for the provision of utilities in Concord’s Utility Service Area. This interlocal agreement was approved by both governing boards at a joint public meeting held on June 25, 2008.

10. This agreement was effective for a period of fifteen (15) years, with an expiration date of June 29, 2023.

In consideration of these Premises and the Terms below, and the provisions of N.C. Gen. Stat. § 160A-460 *et. seq.*, which the parties acknowledge make this Interlocal Agreement binding and enforceable, the parties agree as follows.

TERMS

1. The parties agree to use their best efforts to jointly plan for growth in Concord's Utility Service Area, particularly in the geographic area included in the Central Area Plan and located outside of the Concord's planning and zoning jurisdiction. Such planning shall take into consideration the goals of fiscally responsible growth management, rural preservation, protection of the extension of water and sewer facility services with its resultant likely increase in development intensity in that Area. No wording in this paragraph shall be construed to mean that the County has acquired any additional powers to control, manage, or direct growth in those areas within the municipal boundaries of and the extraterritorial jurisdiction of Concord.

2. The parties agree to jointly adopt the same CAP for the Central Area outside of the planning and zoning jurisdictions of the Cities of Concord and Kannapolis but only within the Utility Service Area of Concord. Pursuant to the Amended Agreement, the parties have been working on the proposed CAP, which work is being developed and coordinated by LandDesign. The parties agree that the CAP will be diligently completed and then forthwith approved by each of the parties pursuant to the procedures provided in the respective ordinances of the parties. Specifically, the parties agree that each will submit the CAP for consideration to their respective planning and zoning boards no later than the regularly scheduled August, 2008 meeting for each such board (or at the next regularly scheduled meeting if the August meeting is not convened for lack of quorum) and that the CAP will be considered by their respective governing boards no later than the next day regularly scheduled meeting for each board after the respective planning and zoning boards refer to the CAP to their respective boards for consideration. The parties acknowledge that each must adopt the same CAP in order for this Interlocal Agreement to accomplish its purposes. The County agrees to assume primary responsibility for finalizing the CAP and initiating any zoning changes as a result in areas outside the extra-territorial zoning jurisdiction of the City. The draft CAP map is attached at Exhibit B.

3. The parties have agreed on two areas in the Utility Service Area referred to as Areas "A" and "B". The location of these areas is shown on a map attached as Exhibit A and incorporated by reference. The line dividing the two areas is referred to as the Utility Service Boundary ("USB"). For all those properties located in Area B the parties agree that Concord at its sole option may extend utility service to owners and developers of such properties. For all those properties located within Area A, Concord shall not extend water and sewer utilities except as required by an emergency, including but not limited to failing on-site waste water treatment systems or failing on-site water wells; or either to (i) properties located within Concord municipal limits or ETJ or (ii) to individual buildings or single service lots of record in existence as of June 30, 2008 and which are adjacent to wastewater or water lines as they may exist on June 30, 2008 or (iii) capital improvement projects to resolve maintenance or operational issues but not to extend service to new customers. Requests for service pursuant to any of these three exceptions must be approved in writing by the City Manager and the County Manager. Concord and the County do consent to the extension of utilities to development owned and operated by

the federal, state, county or municipal governments, or to regional utility lines such as a water pipeline from the Yadkin River basin to Concord.

For the purpose of this agreement only, Concord and the County agree to a boundary adjustment to Area A, which reflects the boundary of an amended annexation agreement executed between Concord and the Town of Midland. The amended boundary is attached as Exhibit C. The overall Central Area Plan Land Use Map as adopted, remains in place, and is not amended.

4. The parties each agree to rezone the affected properties in the CAP in their respective jurisdictions to that zoning classification that matches the land use and densities recommended in the revised CAP.

5. The parties agree to renew the agreement for a period of fifteen (15) years, terminating on June 29, 2038. Notwithstanding, the parties agree to review this Interlocal Agreement at least every five (5) years from the effective date in order to determine if the Interlocal Agreement continues to accomplish its purpose. The parties may amend this Interlocal Agreement at any time by a written instrument agreed to and executed by all the parties.

6. No provision of this Interlocal Agreement shall be construed to impair Concord's right to annex any property in its Utility Service Area, except to the extent that such an annexation by law would require Concord to provide water and/or sewer utility service to a property that would violate the terms of this Interlocal Agreement. In such cases, Concord may annex, but decline to provide utilities.

7. Contemporaneously, with the extension of this Interlocal Agreement, the parties agree to amend accordingly the Agreements and Amended Agreement which are incorporated respectively into the Consent Judgement of January 23, 2006 and the Amended Consent Judgement of October 30, 2007. Except as changed by this Interlocal agreement, the definitions contained in such documents shall retain their meanings.

8. The parties understand and acknowledge that a breach of this Interlocal Agreement would accord the non-breaching party an inadequate remedy at law and that injunctive relief and specific performance would be the only effective remedies. The parties agree that the non-breaching party may seek and obtain injunctive relief and specific performance to enforce the terms of this Interlocal Agreement. The prevailing party in any such litigation shall be entitled to recover its attorney fees and cost of litigation from the party which defaults or breaches the Interlocal Agreement.

9. Should Concord breach this Interlocal Agreement by extending water and sewer utility services to property located in Area A, other than the provision described in Paragraph 3 above, the County as an additional remedy may withhold issuing building permits for development of such property. Should the County breach this Interlocal Agreement, Concord is not required to extend water and sewer utilities to any development approved by the County in derogation of this Agreement, no is Concord required to continue to follow this Agreement.

10. This document and the corresponding Second Amended Consent Judgement containing the Second Amended Agreement collectively comprise the entire agreement between the parties with reference to the matters contemplated by such writings. No modification or amendment shall be valid and enforceable unless reduced to writing and signed by all the parties.

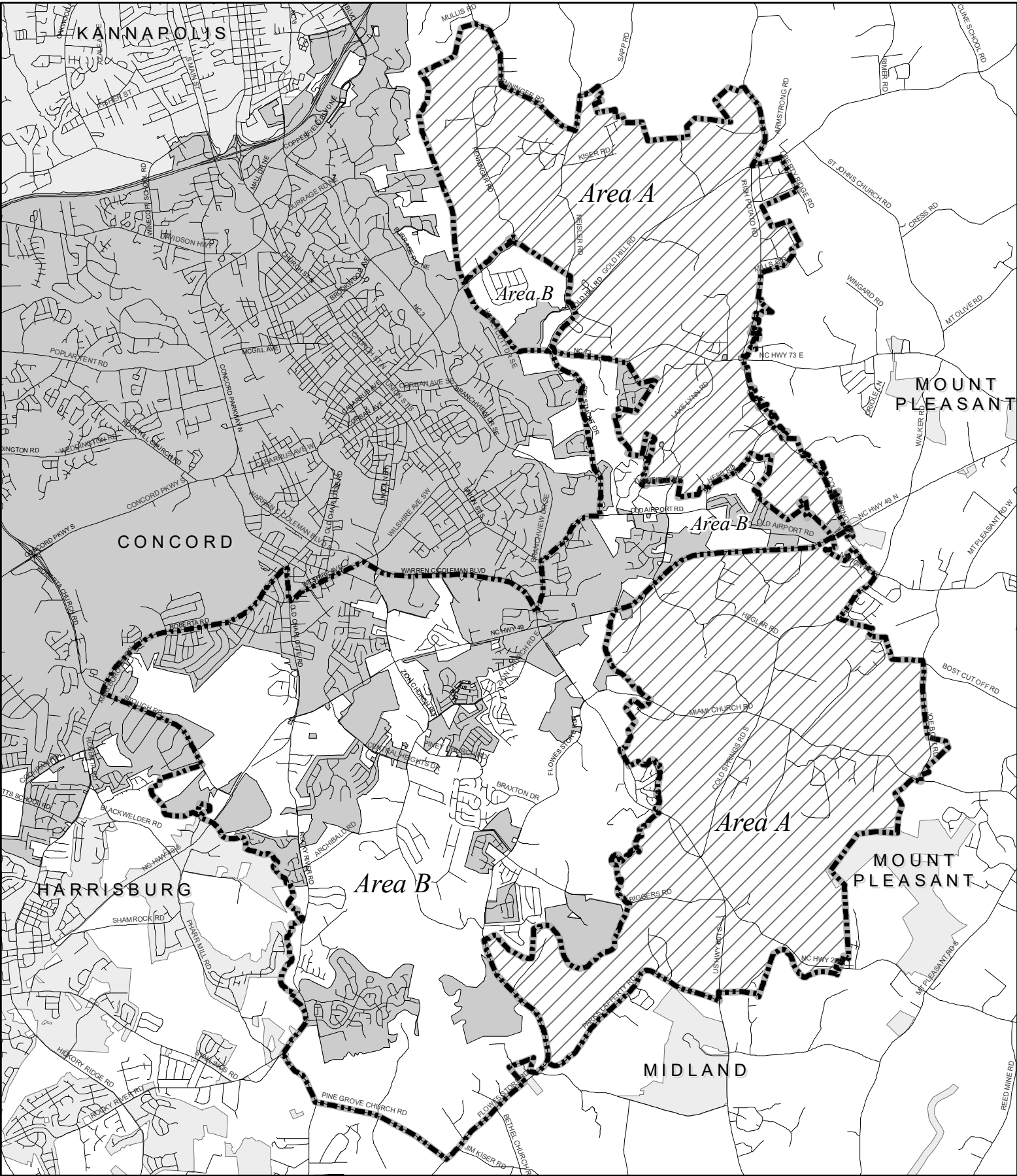





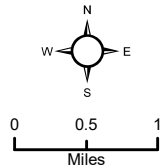


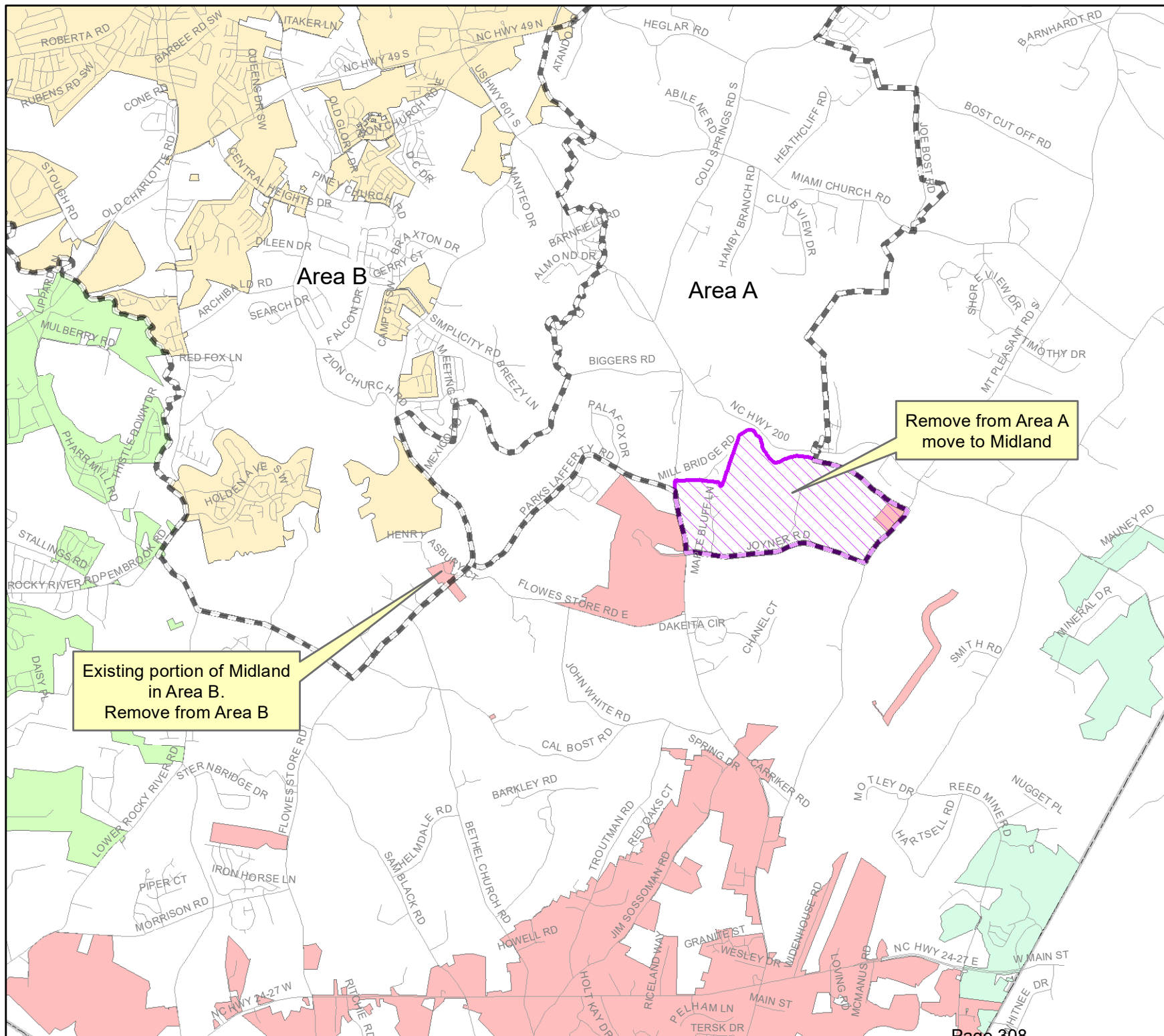
Exhibit C

Central Area Plan
Areas A & B

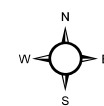
-  Area A
-  Area B
-  Streets
-  City of Concord
-  Other Municipalities



Adjustments to Central Area Plan ILA Area A & B



- Area move to Midland
- Central Area Plan Areas
- Streets
- Concord
- Locust
- Harrisburg
- Midland
- Cabarrus Co.



0 0.5 1
Miles

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Sheriff's Office - Acceptance of Governor's Highway Safety Program (GHSP) Grant Award

BRIEF SUMMARY:

This is an extension of the second year of the current Governor's Highway Safety Program (GHSP) grant funding that was used to expand the Traffic Education and Enforcement Unit. The grant amount of \$125,874.00 will be used for the continuation of this program. There is a county match of \$53,946.00 to the meet eligibility of this grant.

REQUESTED ACTION:

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

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

Chief Tessa Burchett, Cabarrus County Sheriff's Office

BUDGET AMENDMENT REQUIRED:

Yes

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▣ Agreement of Conditions
- ▣ GHSP Grant Application
- ▣ Resolution
- ▣ Budget Amendment

North Carolina Governor's Highway Safety Program

Agreement of Conditions

This Agreement is made by and between the North Carolina Department of Transportation, hereinafter referred to as the "Department", to include the Governor's Highway Safety Program, hereinafter referred to as "GHSP"; and the applicant agency, for itself, its assignees and successors in interest, hereinafter referred to as the "Agency". During the performance of this contract, and by signing this contract, the Agency agrees as follows:

A. Federal Provisions

1. **Equal Opportunity/Nondiscrimination.** The Agency will agree to comply with all Federal statutes and implementing regulations relating to nondiscrimination concerning race, color, sex, religion, national origin, handicaps, and age. These include but are not limited to:
 - (a) Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq., 78 stat. 252);
 - (b) The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 U.S.C. 4601)
 - (c) Federal-Aid Highway Act of 1973, (23 U.S.C. 324 et seq.), and Title IX of the Education Amendments of 1972, as amended (20 U.S.C. 1681-1683 and 1685-1686);
 - (d) Non-Discrimination in Federally-assisted programs of the United States Department of Transportation - Effectuation of Title VI of the Civil Rights Act of 1964 (49 CFR Part 21), hereinafter referred to as "USDOT", as amended;
 - (e) Section 504 of the Rehabilitation Act of 1973, (29 U.S.C. 794 et seq.), as amended, and 49 CFR Part 27; and
 - (f) The Age Discrimination Act of 1975, as amended (42 U.S.C. 6101 et seq.);
 - (g) The Civil Rights Restoration Act of 1987, (Pub. L. 100-209);
 - (h) Titles II and III of the Americans with Disabilities Act (42 U.S.C. 12131-12189) and 49 CFR parts 37 and 38;
 - (i) Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations;
 - (j) Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency
2. **Drug Free Workplace.** The Agency agrees to comply with the provisions cited in the Drug-Free Workplace Act of 1988 (41 U.S.C. 8103).
3. **Federal Grant Requirements and Contracts.** The Agency shall comply with the following statutes and implementing regulations as applicable:
 - (a) Highway Safety Act of 1966 (23 U.S.C. Chapter 4 -), as amended;
 - (b) Sec. 1906, Pub. L. 109-59, as amended by Sec. 4011, Pub. L. 114-94;
 - (c) Uniform Procedures for State Highway Safety Grant Programs (23 CFR part 1300);
 - (d) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 1201);
 - (e) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200) and all other relevant Federal regulations covering the Highway Safety Program;
 - (f) NHTSA Highway Safety Grant Funding Guidance, as revised, July 2015 (www.nhtsa.gov) and additions or amendments thereto.
4. **Political Activity (Hatch Act)** The Agency will comply with provisions of the Hatch Act (5 U.S.C. 1501-1508), which limits the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.
5. **Lobbying.**
 - (a) **Certification Regarding Federal Lobbying.** The undersigned certifies, to the best of his or her knowledge and belief, that:
 - (i) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

- (ii) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
- (iii) The undersigned shall require that the language of this certification be included in the award documents for all sub-award at all tiers (including subcontracts, subgrants, and contracts under grant, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure

- (b) **Restriction on State Lobbying.** None of the funds under this program will be used for any activity specifically designed to urge or influence a State or local legislator to favor or oppose the adoption of any specific legislative proposal pending before any State or local legislative body. Such activities include both direct and indirect (e.g., "grassroots") lobbying activities, with one exception. This does not preclude a State official whose salary is supported with NHTSA funds from engaging in direct communications with State or local legislative officials, in accordance with customary State practice, even if such communications urge legislative officials to favor or oppose the adoption of a specific pending legislative proposal.

6. Audits.

- (a) **Audit Required.** Non-Federal entities that expend \$750,000 or more in a year in Federal awards shall have a single or program-specific audit conducted for that year in accordance with the provisions of 2 CFR, Subpart F, §200.500. Guidance on determining Federal awards expended is provided in 2 CFR, Subpart F, §200.502.
- (b) **Single Audit.** Non-Federal entities that expend \$750,000 or more in a year in Federal awards shall have a single audit conducted in accordance with 2 CFR, Subpart F, §200.501, except when they elect to have a program-specific audit conducted in accordance with 2 CFR, Subpart F, §200.501, paragraph (c).
- (c) **Non-Governmental Entities.** Non-governmental entities (not-for-profit and for-profit entities) must adhere to North Carolina General Statute 143C-6.22 and 09 NCAC Subchapter 03M.

7. Instructions for Lower Tier Certification.

- (a) By signing and submitting this proposal, the prospective lower tier participant (the Agency) is providing the certification set out below and agrees to comply with the requirements of 2 CFR Parts 180 and 1200.
- (b) The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension or debarment.
- (c) The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (d) The terms covered transaction, civil judgement, debarment, suspension, ineligible, participant, person, principal, and voluntarily excluded, as used in this clause, are defined in 2 CFR Part 180 and 1200. You may contact the person to whom this proposal is submitted for assistance in obtaining a copy of those regulations.
- (e) The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, debarred,

suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.

- (f) The prospective lower tier participant further agrees by submitting this proposal that it will include the clause titled "Instructions for Lower Tier Participant Certification" including the "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion – Lower Tier Covered Transaction," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions and will require lower tier participants to comply with 2 CFR Parts 180 and 1200.
 - (g) A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not proposed for debarment under 48 CFR part 9, subpart 9.4, debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant is responsible for ensuring that its principals are not suspended, debarred, or otherwise ineligible to participate in covered transactions. To verify the eligibility of its principals, as well as the eligibility of any prospective lower tier participants, each participant may, but is not required to, check the System for Award Management Exclusions website (<https://www.sam.gov/>).
 - (h) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
 - (i) Except for transactions authorized under paragraph 7(e) of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is proposed for debarment under 48 CFR part 9, subpart 9.4, suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal government, the department or agency with which this transaction originated may pursue available remedies including suspension or debarment.
 - (j) **Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion -- Lower Tier Covered Transactions.**
 - (i) The prospective lower tier participant (the Agency) certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in covered transactions by any Federal department or agency.
 - (ii) Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participants shall attach an explanation to this contract proposal.
- 8. Buy America Act.** The Agency and each subrecipient will comply with the Buy America requirement (23 U.S.C. 313) when purchasing items using Federal funds. Buy America requires a State, or subrecipient, to purchase with Federal funds only steel, iron and manufactured products produced in the United States, unless the Secretary of Transportation determines that such domestically produced items would be inconsistent with the public interest, that such materials are not reasonably available and of a satisfactory quality, or that inclusion of domestic materials will increase the cost of the overall project contract by more than 25 percent. In order to use Federal funds to purchase foreign produced items, the State must submit a waiver request that provides an adequate basis and justification for approval by the Secretary of Transportation.
- 9. Prohibition On Using Grant Funds To Check For Helmet Usage.** The Agency and each subrecipient will not use 23 U.S.C. Chapter 4 grant funds for programs to check helmet usage or to create checkpoints that specifically target motorcyclists.
- 10. Conditions for State, Local and Indian Tribal Governments.** State, local and Indian tribal government Agencies shall adhere to the standards established by 2 CFR Part 225, Cost Principles for State, Local, and Indian Tribal Governments and additions or amendments thereto, for principles for determining costs applicable to grants and contracts with state, local and Indian tribal governments.
- 11. Conditions for Institutions of Higher Education.** If the Agency is an institution of higher education, it shall adhere to the standards established by 2 CFR Part 215 Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations and 2 CFR 220 Cost Principles for Educational Institutions for determining costs applicable to grants and contracts with educational institutions.

- 12. Conditions for Non-Profit Organizations.** If the Agency is a non-profit organization, it shall adhere to the standards established by 2 CFR Part 215 Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations and 2 CFR Part 230 Cost Principles for Non-Profit Organizations for determining costs applicable to grants and contracts with non-profit organizations.
- 13. Conditions for Hospitals.** If the Agency is a hospital, it shall adhere to the standards established by 2 CFR Part 215 Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations.

B. General Provisions

- 1. Contract Changes.** This document contains the entire agreement of the parties. No other contract, either oral or implied, shall supercede this Agreement. Any proposed changes in this contract that would result in any change in the nature, scope, character, or amount of funding provided for in this contract, shall require a written addendum to this contract on a form provided by the Department.
- 2. Subcontracts Under This Contract.** The Agency shall not assign any portion of the work to be performed under this contract, or execute any contract, amendment or change order thereto, or obligate itself in any manner with any third party with respect to its rights and responsibilities under this contract without the prior written concurrence of the Department. Any subcontract under this contract must include all required and applicable clauses and provisions of this contract. Subcontracting does not relieve the Agency of any of the duties and responsibilities of this agreement. The subcontractor must comply with standards contained in this agreement and provide information that is needed by the Agency to comply with these standards. The Agency must submit any proposed contracts for subcontracted services to the Governor's Highway Safety Program for final approval no less than 30 days prior to acceptance.
- 3. Solicitation for Subcontracts, Including Procurements of Materials and Equipment.** In all solicitations, either by competitive bidding or negotiation, made by the Agency for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by the Agency of the Agency's obligations under this contract. Additionally, Agencies making purchases or entering into contracts as provided for by this contract must adhere to the policies and procedures of 2 CFR Part 200 and North Carolina General Statute 143-128.4. Historically underutilized business defined; statewide uniform certification as it pertains to Historically Underutilized Businesses.
- 4. Incorporation of Provisions in Subcontracts.** The Agency shall include the provisions of section A-1 through A-13 of this Agreement in every subcontract, including procurements of materials and leases of equipment, unless exempted by the regulations, or directives issued pursuant thereto. The Agency shall take such action with respect to any subcontract or procurement as the Department, the State of North Carolina, hereinafter referred to as the "State", the National Highway Traffic Safety Administration, hereinafter referred to as "NHTSA", or the Federal Highway Administration, hereinafter referred to as "FHWA", may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the Agency becomes involved in, or is threatened with, litigation with a subcontractor or supplier as a result of such direction, the Agency may request the Department or the State to enter into such litigation to protect the interests of the Department or the State. In addition, the Agency may request the NHTSA or FHWA to enter into such litigation to protect the interests of the United States.
- 5. Outsourcing.** All work shall be performed in the United States of America. No work will be allowed to be outsourced outside the United States of America.
- 6. Property and Equipment.**
 - (a) Maintenance and Inventory.** The Agency shall maintain and inventory all property and equipment purchased under this contract.
 - (b) Utilization.** The property and equipment purchased under this contract must be utilized by the Agency for the sole purpose of furthering the traffic safety efforts of the Agency for the entire useful life of the property or equipment.
 - (c) Title Interest.** The Department and NHTSA retain title interest in all property and equipment purchased under this contract. In the event that the Agency fails or refuses to comply with the provisions of this Agreement or terminates this contract, the Department, at its discretion, may take either of the following actions:
 - (i)** Require the Agency to purchase the property or equipment at fair market value or other mutually agreed to amount; or

- (ii) Require the Agency to transfer the property or equipment and title of said property or equipment, if any, to the Department or to another Agency, as directed by the Department.
- (d) **Non-expendable Property.** Non-expendable property is defined as property or equipment having a value of \$5000 or more with a life expectancy of more than one year. Non-expendable property purchased under this contract cannot be sold, traded, or disposed of in any manner without the expressed written permission of the Department.
7. **Educational or Other Materials.** If allowed, any educational or other materials developed using funds from this contract must be reviewed and approved by the GHSP prior to their production or purchase. The cost of these materials is generally limited to a maximum of \$5.00 per item. The purchase of promotional items and memorabilia are not an allowable cost.
8. **Review of Reports and Publications.** Any reports, papers, publications, or other items developed using funds from this contract must be reviewed and approved by the GHSP prior to their release.
9. **Reimbursement.**
- (a) **General.** Payments are made on a reimbursement basis. There is no schedule of advance payments. Only actual allowable costs are eligible for reimbursement. Claims for reimbursement must be made a minimum of quarterly and no more than once a month via the Grants Management System. Claims for reimbursement not made within the three month threshold are subject to denial. The itemized invoice shall be supported by documentation of costs as prescribed by the Department. Reimbursements will not be processed if other required reports are incomplete or have not been submitted. Failure to submit complete reports by the required deadline may result in denial of reimbursement.
- (b) **Approval.** The Governor's Highway Safety Program and the Department's Fiscal Section shall approve the itemized invoice prior to payment.
- (c) **Unapproved Costs.** Any rejected or unaccepted costs shall be borne by the Agency. The Agency agrees that in the event the Department determines that, due to Federal or State regulations that grant funds must be refunded, the Agency will reimburse the Department a sum of money equal to the amount of Federal and State participation in the rejected costs.
- (d) **Final Claims for Reimbursement.** Final claims for reimbursement must be received by the GHSP within 30 days following the close of the approved contract period. Project funds not claimed by this date are subject to reversion.
- (e) **Expending Funds Under This Contract.** Under no circumstances will reimbursement be made for costs incurred prior to the contract effective date or after the contract ending date.
10. **Project Costs.** It is understood and agreed that the work conducted pursuant to this contract shall be done on an actual cost basis by the Agency. The amount of reimbursement from the Department shall not exceed the estimated funds budgeted in the approved contract. The Agency shall initiate and prosecute to completion all actions necessary to enable the Agency to provide its share of the project costs at or prior to the conclusion of the project.
11. **Program Income.** The Agency shall account for program income related to projects financed in whole or in part with federal funds in accordance with 2 CFR 200.307. Program income earned during the contract period shall be retained by the Agency and deducted from the federal funds committed to the project by the GHSP unless approved in advance by the Federal awarding agency as an addition to the project. Program income must be accounted for separately and the records made available for audit purposes.
12. **Project Directors.** The Project Director, as specified on the signature page of this Agreement, must be an employee of the Agency or the Agency's governing body. Any exception to this provision must have the expressed written approval of GHSP.
13. **Reports Required.**
- (a) **Quarterly Progress Reports.** Unless otherwise directed, the Agency must submit Quarterly Progress Reports to the GHSP, on forms provided by the Department, which reflect the status of project implementation and attainment of stated goals. Each progress report shall describe the project status by quarter and shall be submitted to GHSP no later than fifteen (15) days after the end of each quarter. If the Agency fails to submit a Quarterly Progress Report or submits an incomplete Quarterly Progress Report, the Agency will be subject to having claims for reimbursement withheld. Once a Quarterly Progress Report that substantiates adequate progress is received, cost reimbursement requests may be processed or denied at the discretion of GHSP.
- (b) **Final Accomplishments Report.** A Final Accomplishments Report must be submitted to the GHSP within fifteen (15) days of completion of the project, on forms provided by the Department, unless otherwise directed. If the Agency fails to submit a Final Accomplishments Report or submits an

incomplete Final Accomplishments Report, the Agency will be subject to having claims for reimbursement withheld. Once a Final Accomplishments Report that substantiates adequate progress is received, claims for reimbursement may be processed or denied at the discretion of GHSP.

- (c) **Audit Reports.** Audit reports required in Section A-6 above shall be provided to the Department within thirty (30) days of completion of the audit.

14. Out-of-State Travel.

- (a) **General.** All out-of-state travel funded under this contract must have prior written approval by the Governor's Highway Safety Program.
- (b) **Requests.** Requests for approval must be submitted to the GHSP, on forms provided by the Department, no less than thirty (30) days prior to the intended departure date of travel.
- (c) **Agency Travel Policy Required.** For Agencies other than state agencies, out-of-state travel requests must include a copy of the Agency's travel policy, to include allowances for lodging, meals, and other travel-related expenses. For state agencies, maximum allowable subsistence is limited to the prevailing per diem rates as established by the North Carolina General Assembly.
- (d) **Agenda Required.** Out-of-state travel requests must include a copy of the agenda for the travel requested.

15. Conditions for Law Enforcement. In addition to the other conditions provided for in this Agreement, grants to law enforcement agencies are subject to the following:

(a) Certifications Required.

- (i) **In-car Camera or Video System.** For any in-car camera or video system purchased under this contract, it is required that the operator of that equipment has successfully completed Standardized Field Sobriety Testing training (SFST). A copy of this certificate must be filed with GHSP prior to reimbursement of in-car camera or video systems.
- (ii) **Radar.** For any radar equipment purchased under this contract, it is required that the operator of that equipment has successfully completed Radar Certification Training. A copy of this certificate must be filed with GHSP prior to reimbursement of radar equipment.
- (iii) **Alcohol Screening Devices.** For any preliminary alcohol screening devices purchased under this contract, it is required that the operator of that equipment has successfully completed the Alcohol Screening Test Device training offered by the Forensic Test for Alcohol Branch.

- (b) **Report Required - Monthly Enforcement Data Report.** In addition to the reports mentioned above, law enforcement agencies engaging in enforcement activities must submit a Monthly Enforcement Data Report on the form provided by the Department no later than fifteen (15) days after the end of each month. If the Agency fails to submit a Monthly Enforcement Data Report or submits an incomplete Monthly Enforcement Data Report, the Agency will be subject to having cost reimbursement requests withheld. Once a Monthly Enforcement Data Report that substantiates adequate progress is received, cost reimbursement requests will be processed. The agency head must sign the form. However, the agency head may assign a designee to sign the form by providing written signature authority to the GHSP.

16. Conditions for Local Governmental Agencies.

- (a) **Resolution Required.** If the Agency is a local governmental entity, a resolution from the governing body of the Agency is required on a form provided by the Department.
- (b) **Resolution Content.** The resolution must contain a commitment from the governing body to provide the local funds as indicated in this contract. Additionally, the resolution is required even if the funding is one hundred percent from federal sources, as it serves as recognition by the governing body of federal funding for purposes of Section A-6 above.

17. Seat Belt Policy and Use. Agency must adopt and enforce a seat belt use policy required for all seating positions unless exempted by state law.

18. Text Messaging Policy. Agency must adopt and enforce a policy banning text messaging while driving unless exempted by state law.

19. Prohibited Interests. No member, officer, or employee of the Agency during his or her tenure, and for at least one (1) year thereafter, shall have any interest, direct or indirect, in this contract or the proceeds thereof or therefrom.

20. Continued Federal and State Funding.

- (a) **Federal Funding.** The Agency agrees and understands that continuation of this project with Federal funds is contingent upon Federal funds being appropriated by the United States Congress specifically for that purpose. The Agency further agrees and understands that in the event funds originally

appropriated by Congress for these grants are subsequently reduced by further acts of Congress, funding to the Agency may be proportionately reduced.

- (b) **State Funding.** The Agency agrees and understands that continuation of this project with funds from the State of North Carolina is contingent upon State funds being appropriated by the General Assembly specifically for that purpose. The Agency also agrees that any state funds received under this contract are subject to the same terms and conditions stated in this Agreement.
- 21. Performance.** All grants provided by the Governor's Highway Safety Program are performance-based and, as such, require that continual progress be made toward the reduction of the number and severity of traffic crashes. Any agency, whose performance is deemed unsatisfactory by the GHSP, shall be subject to the sanctions as provided for in this contract. Additionally, unsatisfactory performance shall be cause for the Department to reduce or deny future funding.
- 22. Resolution of Disputes.** Any dispute concerning a question of fact in connection with the work not disposed of by contract by and between the Agency and the Department, or otherwise arising between the parties to this contract, shall be referred to the Secretary of the North Carolina Department of Transportation and the authorized official of the Agency for a negotiated settlement. In any dispute concerning a question of fact in connection with the project where such negotiated settlement cannot be resolved in a timely fashion, the final decision regarding such dispute shall be made by the Secretary of the North Carolina Department of Transportation, with the concurrence of the Federal funding agency, and shall be final and conclusive for all parties.
- 23. Department Held Harmless.**
- (a) **For State Agencies.** Subject to the limitations of the North Carolina Tort Claims Act, the Agency shall be responsible for its own negligence and holds harmless the Department, its officers, employees, or agents, from all claims and liability due to its negligent acts, or the negligent acts of its subcontractors, agents, or employees in connection with their services under this contract.
- (b) **For Agencies Other Than State Agencies.** The Agency shall be responsible for its own negligence and holds harmless the Department, its officers, employees, or agents, from all claims and liability due to its negligent acts, or the negligent acts of its subcontractors, agents, or employees in connection with their services under this contract.
- 24. Records Access and Retention.** The Agency shall provide all information and reports required by the regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the Department, the State, NHTSA, or FHWA, as appropriate, to be pertinent to ascertain compliance with such regulations, orders and instructions. Furthermore, the Agency shall maintain such materials during the contract period, and for five (5) years from the date of final payment from the Department or until all audit exceptions have been resolved, for such inspection and audit. Where any information required of the Agency is in the exclusive possession of another who fails or refuses to furnish this information, the Agency shall so certify to the Department, State, NHTSA, or FHWA, as appropriate, and shall set forth what efforts it has made to obtain the information. Pursuant to N.C.G.S. §147-64.7, the Department, the State Auditor, appropriate federal officials, and their respective authorized employees or agents are authorized to examine all books, records, and accounts of the Agency insofar as they relate to transactions with any department, board, officer, commission, institution, or other agency of the State of North Carolina pursuant to the performance of this Agreement or to costs charged to this Agreement.
- 25. Sanctions for Non-Compliance.** The applicant Agency agrees that if it fails or refuses to comply with any provisions and assurances in this contract, the Department may take any or all of the following actions:
- (a) Cancel, terminate, or suspend this contract in whole or in part;
- (b) Withhold reimbursement to the Agency until satisfactory compliance has been attained by the Agency;
- (c) Refrain from extending any further funding to the Agency under this contract with respect to which the failure or refusal occurred until satisfactory assurance of future compliance has been received from the Agency;
- (d) Refer the case to the United States Department of Justice for appropriate legal proceedings.
- 26. Cancellation, Termination, or Suspension of Contract.**
- (a) **By the Department.** For noncompliance with any of the said rules, regulations, orders or conditions, due to management deficiencies or criminal activity this contract may be immediately canceled, terminated, or suspended in whole or in part by the Department. For noncompliance not indicative of management deficiencies or criminal activity the Department shall give sixty (60) days written notice

to take corrective action. If the Agency has not taken the appropriate corrective action after sixty (60) days the Department may cancel, terminate, or suspend this contract in whole or in part.

(b) By mutual consent. The Agency or the Department may terminate this contract by providing sixty (60) days advanced written notice to the other party.

(c) Unexpended funds. Any unexpended funds remaining after cancelation or termination will revert to the Department.

27. Completion Date. Unless otherwise authorized in writing by the Department, the Agency shall commence, carry on, and complete the project as described in the approved Highway Safety Project Contract by September 30 of the Federal fiscal year for which it was approved.

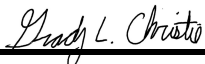
28. E-Verify requirements. If this contract is subject to NCGS 143-133.3, the contractor and its subcontractors shall comply with the requirements of Article 2 of Chapter 64 of the NC General Statutes.

29. Certification of Eligibility Under the Iran Divestment Act. Pursuant to G.S. 147-86.59, any person identified as engaging in investment activities in Iran, determined by appearing on the Final Divestment List created by the State Treasurer pursuant to G.S. 147-86.58, is ineligible to contract with the State of North Carolina or any political subdivision of the State. The Iran Divestment Act of 2015, G.S. 147-55 et seq. requires that each Agency, prior to contracting with the State certify, and the undersigned Agency Authorizing Official on behalf of the Agency does hereby certify, to the following:

- (a)** that the Agency is not now and was not at the time of the execution of the Contract dated below identified on the Final Divestment List of entities that the State Treasurer has determined engages in investment activities in Iran;
- (b)** that the Agency shall not utilize on any contract with the State agency any subcontractor that is identified on the Final Divestment List; and
- (c)** that the undersigned Agency Authorizing Official is authorized by the Agency to make this Certification.

30. Agency Fiscal Year. The end date for the Agency's fiscal year is June 30.

31. Signature. By signing below, the Agency agrees to adhere to the terms and conditions of this Agreement.

AGENCY PROJECT DIRECTOR		
NAME Grady L.Christie	TITLE Sergeant	ADDRESS 30 Corban Ave SE, Concord,NC
SIGNATURE 	DATE 6/9/2023	TELEPHONE NUMBER 704-920-3000
AGENCY AUTHORIZING OFFICIAL		
NAME	TITLE	ADDRESS
SIGNATURE	DATE	TELEPHONE NUMBER
AGENCY OFFICIAL AUTHORIZED TO RECEIVE FUNDS		
NAME	TITLE	ADDRESS
SIGNATURE	DATE	TELEPHONE NUMBER

North Carolina Governor's Highway Safety Program

SECTION A – GENERAL INFORMATION

1. Project Title: * Cabarrus County Sheriff's Office Traffic Enforcement and Education Unit Expansion	
2. Agency: 1000000041 - CABARRUS COUNTY	3. Contact Person for Agency: Grady Christie
4. Agency Address: SHERIFF PO Box 525 CONCORD, NC 28026-0525	5. Telephone Number: * (704) 920-3000
	6. Cell Phone: (704) 743-3863
7. Physical Location of Agency * 30 Corban Ave SE Concord, NC 28025	8. Email of Contact Person * glchristie@cabarruscounty.us
9. Federal Tax ID Number / Type of Agency Federal Tax ID Number: * 56-6000281 Unique Entity Identifier: PF3KTEELMHV6 County: * CABARRUS Type of Agency <input type="radio"/> State <input type="radio"/> Non-Profit <input checked="" type="radio"/> County <input type="radio"/> Higher Education <input type="radio"/> Municipality <input type="radio"/> Hospital	10. Project Year * <input type="radio"/> New <input checked="" type="radio"/> Continuation Year: <input type="radio"/> 1 <input checked="" type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4+ Fiscal Year 2024
	11. Allocation of Funding * Federal % 70.00 Local % 30.00

Source of Funds			
12. Budget	Total Project Amount	Federal Amount	State/Local Amount
Personnel Costs	\$173,820.00	\$121,674.00	\$52,146.00
Contractual Services			
Other Direct Costs	\$6,000.00	\$4,200.00	\$1,800.00
Indirect Costs			
Total Project Costs	\$179,820.00	\$125,874.00	\$53,946.00

13. Specify How Non-Federal Share Will Be Provided: *
Cabarrus County will provide the non-Federal share of the funds. (Account 00192110-9101)

Project Number:	CFDA#: 20. Work Type:
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SECTION B – DESCRIPTION OF PROJECT

Statement of Problem (Provide detailed information of the highway safety problems in your area to be addressed through this project. Include countywide crash data for the last three years and any other relevant information to validate the statements. For more detailed information see "How to write an effective traffic safety project" located at:

<https://connect.ncdot.gov/municipalities/Law-Enforcement/Pages/Law-Enforcement-Reporting.aspx>)

In October 2019, Cabarrus County saw the first Unit dedicated solely to traffic enforcement and education. The County is increasing, and traffic complaints about speeding and reckless driving placed heavy demands on an already stretched-thin patrol division. Through the generosity of the Governor's Highway Safety Program, our grant receives approval, and a three-year journey begins. The goals are challenging and require hard work and dedication. Even though the hopes were to receive funding for a complete five-person unit with four traffic Officers and a Supervisor, we were grateful for the approval of two Officers.

The Cabarrus County Sheriff's Office has 243 sworn deputies, with 72 assigned to patrol duties. Those 72 deputies provide law enforcement services to approximately 85,428 residents of Cabarrus County, including all unincorporated areas of the County

and Harrisburg, Midland, and Mt. Pleasant towns. In October of 2019, the Sheriff's Office received a grant through GHSP for a dedicated traffic unit to cover the entire County, 364 square miles. Historically, traffic enforcement is part of regular patrol duties. However, traffic crash investigation is the NC Highway Patrol's responsibility and the Deputies working inside the three separate towns. In addition, the towns of Harrisburg, Mt. Pleasant, and Midland have contracts with the Sheriff's Office to provide 24-hour law enforcement services within their town limits. In 2021, the Cabarrus County Sheriff's Office responded to 20,178 calls for service, followed by a 6.95% increase in 2022 to 21,581 calls for service.

The Cabarrus County Sheriff's Office investigated 828 crashes in 2022, an increase of 8.8% from 2021. The ongoing lifting of COVID-19 restrictions during 2022 could account for the rise in collisions. In 44 crashes, there is a suspicion of alcohol or drug use, representing an increase of 100% from 2021. Of the 44 impairment-related crashes, 8 resulted in injury; 3 resulted in a fatality. For all other crashes investigated by the Sheriff's Office in 2022, 15.8% resulted in injury, a decrease of 3.77% from 2021.

While impaired drivers are a safety issue, they are not the only contributing factor to the number of crashes in Cabarrus County. The Cabarrus County Sheriff's Office has investigated 3,029 crashes in four years. Regardless of who investigates the crash, it is the Cabarrus County Sheriff's Office's responsibility to enforce traffic laws, which can help reduce the number of crashes. Even though the Sheriff's Office may not investigate the collision, the violations that lead to these crashes are preventable through education and enforcement. According to NHTSA, one of the best methods for reducing impaired driving is a combination of high-visibility enforcement (including checking stations) and heavy public awareness. This philosophy applies to other traffic offenses such as speeding, passenger restraint violations, and distracted driving. The Traffic Enforcement and Education Unit's implementation allows the Sheriff's Office to conduct targeted area enforcement and public awareness through education and information sharing.

According to the 2021 census, Cabarrus County is home to approximately 231,278 residents and is now the 11th most populated County in North Carolina. The County's business community is diverse, with a mix of small and large organizations in industries ranging from bioscience, motorsports, tourism, retail, and manufacturing. Cabarrus County is in the state's central piedmont area, with a total area of 364 square miles, and it borders Mecklenburg County, the second most populated County in North Carolina.

Cabarrus County is home to two of the most prominent tourist attractions on the East Coast, Concord Mills Mall and the Charlotte Motor Speedway. Cabarrus County continues to grow and has seen a 26.8% increase in population since 2010. According to the NC Budget and Management website, Cabarrus County will have just over 274,779 residents by July 2030.

Major companies such as Amazon have opened distribution centers in Cabarrus County, which has increased population and traffic, especially during regular workweek hours. As a result, Cabarrus County saw an increase in employment from 103,000 employees to 105,000 employees (2.05%) from 2019 to 2020.

Cabarrus County has ten major highways that run through it. They include Interstate 85, US Highways 29, 52, 601, and NC Highways 3, 24, 27, 49, 73, and 200. The average household owns two cars and has an average commute of 28.2 minutes. Located just 20 minutes from downtown Charlotte, Cabarrus County is home to a large portion of Charlotte's workforce.

The countywide traffic enforcement and education unit is a large and critical part of the solution to decrease traffic crashes in Cabarrus County. The Unit's sole purpose is to identify, enforce, and educate those drivers who choose to operate a vehicle dangerously and place all other persons in danger. However, it is vital that the Sheriff's Office also maintains (and increase, where possible) its current efforts. The Sheriff's Office works with local media outlets to produce an educational campaign to address distracted and dangerous driving with the traffic unit. The contributing circumstances surrounding these crashes are 100% preventable. Most citizens do the right thing and operate their vehicles with due regard for the safety of others. However, the message is clear for those who choose to endanger the lives of others by driving while impaired, speeding, driving while distracted, violating the right of way laws, and not wearing or using occupant protection devices. We are looking for you, and we will stop you. The Cabarrus County Sheriff's Office believes that the careless operation of a motor vehicle has such terrible consequences that it must expand to a full-time five-member traffic unit dedicated to finding and arresting these drivers.

There are circumstances, especially where young drivers are involved, and educating them may be the only prevention tool we need. This Unit continues to identify ways to reach younger drivers and reduce the number of crashes involving them. Cabarrus County is ranked 10th in North Carolina for crashes involving young drivers. However, in 2019 the County ranked 17th worst for young drivers involved in serious injury crashes. Due to the Traffic Unit's focus and the time dedicated to improving this ranking through education before enforcement, the County's ranking improved to 26th. The young drivers of Cabarrus County represent the future, with the average age of a Cabarrus County resident being 38.

Below is a comparison of where Cabarrus County ranked in specific categories and how a dedicated Traffic Unit made a difference in three years. The ranking for each category is the average over four years of reporting across the state utilizing the an annual report from NC Crash Data.

2019 – Cabarrus County (NC Crash Data Average Ranking using the years 2014-2018)

- Overall Fatality Ranking: 23rd
- Alcohol Fatality Ranking: 23rd
- Unrestrained Fatality Ranking: 30th
- Speed Related Fatalities Ranking: 15th
- Young Drivers Involved in Serious Injury Crashes Ranking: 17th

2021 – Cabarrus County (NC Crash Data Average Ranking using the years 2016-2020)

- Overall Fatality Ranking: 21st
- Alcohol Fatality Ranking: 21st
- Unrestrained Fatality Ranking: 27th
- Speed Related Fatalities Ranking: 41st
- Young Drivers Involved in Serious Injury Crashes Ranking: 26th

2022 – Cabarrus County (NC Crash Data Average Ranking using the years 2017-2021)

- Overall Fatality Ranking: 22nd
- Alcohol Fatality Ranking: 28th
- Unrestrained Fatality Ranking: 32nd
- Speed Related Fatalities Ranking: 35th
- Young Drivers Involved in Serious Injury Crashes Ranking: 26th

Proposed Solution (*Begin with a one-sentence summary of your project. Then describe in detail how your proposed project will address the problem identified in the "Statement of Problem" section*):

The demands on the current traffic unit and the desire to accomplish all grant goals required expanding the team by adding two additional Deputies.

In 2019 the original grant request for the first countywide traffic unit included a Sergeant with four Officers. There are difficulties in addressing all grant goals with only two officers. From the inception of the Traffic Unit, both Officers produced impressive numbers in most areas. However, other parts did not receive the attention we wanted to devote to them. As the original grant ended, the Unit received a new grant expanding by two more traffic Officers. The County Commissioners praised the efforts of the existing two traffic Officers and fully supported the request to expand the Unit. The expansion allows for the improvement of the educational component of the Unit and a dedicated effort to reduce impaired driving.

While the original Traffic Officers address the high demands for traffic enforcement throughout the County during the day, the new Traffic Officers focus on traffic enforcement and the urgent need to improve the educational component of the Unit. The new Traffic Officers worked with the school system to develop programs that focus on the dangers of impaired and distracted driving. The Traffic Unit presents impressive numbers in speeding and seatbelt enforcement, and 100% participation in GHSP campaigns speaks volumes, considering the large geographical area covered by the Officers.

The Cabarrus County Sheriff's Office is not satisfied with exceeding only some of the goals in the grant. We want to accomplish all objectives, and we want to exceed the program's expectations. Our agency answers to a rapidly growing population while experiencing significant growth within the agency. The County is nearing the completion of a new courthouse requiring 41 sworn deputies to oversee daily court proceedings. The population growth has no signs of slowing, along with the demands for more traffic enforcement and education. As citizens' needs for traffic-related concerns increase, it is necessary to continue the incredible work of the current Traffic Unit. We hope the notable work and unwavering dedication to traffic enforcement and education represented to date supports the expansion of the Unit.

Budget Justification (*Provide a detailed explanation of the costs associated with proposed project*):

The cost associated with this application covers the salaries and fringe benefits for two Deputies. The two deputies in this grant were added to the Traffic Unit the County Commissioners enthusiastically support maintaining and expanding. The Traffic Unit has four Officers, two GHSP funded, with one Supervisor.

The grant application includes in- and out-of-state travel to traffic-focused conferences to expose the new members of the traffic unit to training from traffic safety experts nationwide. The education and tactics from these events will help all the members to

make a practical impact on improving traffic safety in Cabarrus County.

Travel Justification (Provide justification for all travel expenses):

Members of the Traffic Unit will attend the annual GHSP Traffic Conference in North Carolina and Lifesaver's Conference, typically held out of state. In addition, members will participate in the yearly BikeSafeNC conference. Attending these conferences provides the opportunity to hear current training and tactics from experts in traffic safety and education fields. Traffic Unit Officers will use the information obtained from these conferences to improve current enforcement and education techniques. Grant funds will cover registration, class fees, lodging, and per diem.

To be completed by law enforcement agencies seeking first year grant:

Provide the agency's number of sworn officers	243
Does the agency currently have a dedicated traffic or DWI unit?	Yes <input checked="" type="radio"/> No <input type="radio"/>
If a dedicated traffic or DWI unit exists, how many officers are assigned to the unit?	5

For applicants requesting enforcement grants, please provide the following county fatality rankings:

Information can be located at:

<https://connect.ncdot.gov/municipalities/Law-Enforcement/Pages/Law-Enforcement-Reporting.aspx>

Overall Fatality Ranking:	22
Alcohol Fatality Ranking:	28
Unrestrained Fatality Ranking:	32
Speed Related Fatalities:	35
Other Applicable Rankings: (Specify)	Young drivers Crashes:10th Young Serious Injury:26th Motorcycle Fatality:16th

As part of this project all law enforcement agencies must enter traffic enforcement citations data of their agency for the past three years.

Year 2020	Occupant Protection Citations	350	DWI Citations	138	Speed Citations	2,817
Year 2021	Occupant Protection Citations	417	DWI Citations	116	Speed Citations	2,467
Year 2022	Occupant Protection Citations	265	DWI Citations	193	Speed Citations	2,777

Goals and Objectives (Provide at least one SMART (Specific, Measurable, Attainable, Realistic and Timely) goals and objectives. For more detailed information see "How to write an effective traffic safety project" located at:

<https://connect.ncdot.gov/municipalities/Law-Enforcement/Pages/Law-Enforcement-Reporting.aspx>)

Goal #1: Reduce traffic fatalities in Cabarrus County by 10 percent from the 2017-2021 annual average of 22.6 to 20 by September 30, 2024.

Objectives:

- Identify the top 8 high crash locations and conduct targeted enforcement efforts a minimum of once a week.
- Conduct/participate in 3 outreach/educational traffic safety events each quarter.
- Participate and report in all GHSP and national highway safety campaigns. (Including, but not limited to Booze It & Lose It, Click It or Ticket, Child Passenger Safety, Distracted Driving Awareness, Motorcycle Awareness, etc.). Full campaign participation is accomplished through increased high visibility enforcement as appropriate.
- Meet quarterly with local and state DOT engineers to discuss crash causes in high crash locations.
- Coordinate with local media outlets on traffic enforcement and outreach activities a minimum of 2 times a quarter.
- Coordinate or participate in a minimum of 2 multi-agency traffic enforcement activities per quarter.
- Engage a minimum of 3 media partners in the traffic safety message.
- Increase the number of occupant protection contacts by 20 percent from the 2022 total of 265 to 318 from October 1, 2023, to September 1, 2024.
- Increase the number of speeding contacts by 20 percent from the 2022 total of 2777 to 3332 from October 1, 2023, to September 1, 2024.

Goal #2: To reduce the number of alcohol-related crashes in Cabarrus County by 10 percent from the 2017-2021 calendar year average of 238.6 crashes to 214 crashes during the fiscal year October 1, 2023, to September 30, 2024.

Objectives:	<ul style="list-style-type: none"> • Increase the number of DWI contacts by 20 percent from 193 in the calendar year 2022 to 232 during the fiscal year October 1, 2023, to September 30, 2024. • Conduct/participate in 2 impaired driving checking stations/saturation patrols each month. • Identify the top alcohol-related crash areas and conduct targeted enforcement efforts a minimum of 1 time a week. • Conduct/participate in 2 impaired driving outreach/educational events each quarter. • Participate and report in all GHSP and national highway safety campaigns focused on impaired driving (Including, but not limited to Booze It & Lose It: St. Patrick's Day, Operation Firecracker, Labor Day, Halloween, and Holiday campaigns, etc.). Full campaign participation is accomplished through increased high-visibility enforcement. • Engage a minimum of 3 media partners in the traffic safety message focused on impaired driving.
Goal #3:	Reduce the number of young (age 20 and younger) driver-involved crashes in Cabarrus County by 10 percent from the 2017-2021 calendar year average of 1278 crashes to 1150 crashes during the fiscal year October 1, 2023, to September 30, 2024.
Objectives:	Identify the top 8 young driver-involved high crash locations and conduct targeted enforcement efforts a minimum of 2 times a month. <ul style="list-style-type: none"> • Conduct/participate in 2 day-time seat belt initiatives each quarter. • Conduct/participate in 2 night-time seat belt initiatives each quarter. • Conduct/participate in 4 highway safety outreach/educational events focused on teens/young drivers each year. • Conduct/participate in 4 outreach/educational events focused on young drivers highlighting the importance of occupant restraint use and other high-risk driving behaviors each year. • Participate and report in all GHSP and national highway safety campaigns, especially those focused on youth-related highway safety issues

Below are the 5-year goals of the NC Governor's Highway Safety Program (GHSP). To be eligible for funding, your traffic safety project should match one or more of the GHSP goals. Check all that apply.

<input checked="" type="checkbox"/>	Reduce NC's traffic-related fatalities by 17.58% from the 2016-2020 average of 1458.6 to 1,202 by December 31, 2024.
<input checked="" type="checkbox"/>	Reduce NC's alcohol-related fatalities by 5% from the 2016-2020 average of 417.2 to 396 by December 31, 2024.
<input checked="" type="checkbox"/>	Reduce NC's unrestrained fatalities by 5% from the 2016-2020 average of 430.4 to 408 by December 31, 2024.
<input checked="" type="checkbox"/>	Reduce NC's speed-related fatalities by 10% from the 2016-2020 average of 427.2 to 384 by December 31, 2024.
<input checked="" type="checkbox"/>	Reduce NC's young driver-related fatal crashes by 5% from the 2016-2020 average of 172.4 to 163 by December 31, 2024.
<input checked="" type="checkbox"/>	Reduce NC's motorcycle fatalities by 5% from the 2016-2020 average of 190.8 to 181 by December 31, 2024.
<input checked="" type="checkbox"/>	Increase NC's seat belt usage rate 1.0 percentage points from 90.8% in 2022 to 91.8% by December 31, 2024.

SECTION C – BUDGET DETAIL

Personnel Costs

#	Personnel Position	Salary
1	Active hours for Deputy 1	\$62,771.00
2	Active hours for Deputy 1	\$52,647.00
Total Salaries Cost:		\$115,418.00
#	Personnel Fringe Benefits	Cost
1	Fringe Benefits 2 Deputies	\$58,402.00
Total Fringe Benefits Cost:		\$58,402.00
Total Personnel Costs:		\$173,820.00

Other Direct Costs

#	Equipment	Quantity	Cap Amount	Cost
Total Equipment Cost				
Other Equipment Details :				
#	Other Items and Equipment Direct Cost:			Cost

Total Other Items and Equipment Direct Cost:		
#	Travel	Cost
1	In-State Travel	\$1,500.00
2	Out-of-State Travel	\$4,500.00
Total Travel Cost:		\$6,000.00
Total Other Direct Costs:		\$6,000.00

SECTION D – SCHEDULE OF TASKS BY QUARTERS

List the schedule of tasks by quarters, referring specifically to the objectives in Section B. Tasks should be a bulleted list of activities to be performed in each quarter.

Conditions for Enforcement Projects Only

By checking this box, the above agency agrees to the terms below as additional activities to be performed as part of this project.



- A minimum of one (1) nighttime and one (1) daytime seat belt initiative per month;
- A minimum of one (1) impaired driving checkpoint per month;
- A minimum of 50% of seat belt initiatives must be conducted at night between the hours of 7:00 p.m. and 7:00 a.m.;
- Participation in all "Click It or Ticket" and "Booze It & Lose It" campaigns;
- Participation in any event or campaign as required by the GHSP;
- Attempt to utilize one of the Forensic Tests for Alcohol Branch's Mobile Breath Alcohol Testing (BATMobiles) units during at least one of the impaired driving checkpoints.

First Quarter (October, November, December)

Continue to develop training presentations on the topic of the dangers of driving while impaired, speeding, distracted driving, and motorcycle awareness.

Solicit input from the GHSP about the educational component.

Conduct required safety belt checkpoints during the first quarter.

Conduct required impaired driving checkpoints during the quarter.

Participate in any "Click It or Ticket", "Booze It & Lose It" or any event/campaign as required by GHSP during the quarter.

Prepare and submit a quarterly progress report to GHSP.

Second Quarter (January, February, March)

Begin media campaign on the dangers of driving while impaired, speeding, and distracted driving.

In March begin the motorcycle awareness campaign.

Document the number of educational campaigns conducted.

Enforcement and Education protocols in place to address the goals of the project.

Document the progress made to date on enforcement and education.

Conduct required safety belt checkpoints during the second quarter.

Conduct required impaired driving checkpoints during the quarter.

Participate in any "Click It or Ticket", "Booze It & Lose It" or any event/campaign as required by GHSP during the quarter.

Prepare and submit a quarterly progress report to GHSP.

Third Quarter (April, May, June)

Attend Lifesavers Conference, April 07–09, 2024, Denver, CO.

Monitor progress to date on the Enforcement and Education Unit. Work with BikeSafe NC to promote motorcycle awareness and safety.

Document the number of educational campaigns conducted.

Document the progress made to date on enforcement.

Conduct required safety belt checkpoints during the third quarter.

Conduct required impaired driving checkpoints during the quarter.

Participate in any "Click It or Ticket", "Booze It & Lose It" or any event/campaign as required by GHSP during the quarter.

Prepare and submit a quarterly progress report to GHSP.

Attend BikeSafe NC Conference, June 2024, Ashville, NC.

Fourth Quarter (July, August, September)

Continue to monitor progress to date on the Enforcement and Education Unit.

Document the number of educational campaigns conducted.

Document the progress made to date on enforcement.

Conduct required safety belt checkpoints during the fourth quarter.

Conduct required impaired driving checkpoints during the quarter.

Participate in any "Click It or Ticket", "Booze It & Lose It" or any event/campaign as required by GHSP during the quarter.
Prepare and submit a final progress report to GHSP.
Attend NC Traffic Safety Conference, August 2024, Raleigh, NC.

AGENCY AUTHORIZING SIGNATURE

☐ I have read and accept terms and conditions of the grant funding and attached the Grant Agreement. The information supplied in this application is true to the best of my knowledge

Name: PIN: Date:

Note:

- 1. Submitting grant application is not a guarantee of grant being approved.
- 2. Once form has been submitted, it cannot be changed unless it has a status of "Return".

FOR GHSP USE ONLY:

Recommendation:

Date:

North Carolina Governor's Highway Safety Program LOCAL GOVERNMENTAL RESOLUTION

WHEREAS, the Cabarrus County Sheriff's Office (herein called the "Agency")
has completed an application contract for traffic safety funding; and that Cabarrus County Board of
(The Governing Body of the Agency)
Commissioners (herein called the "Governing Body") has thoroughly considered the problem
identified and has reviewed the project as described in the contract;
THEREFORE, NOW BE IT RESOLVED BY THE Cabarrus County Board of Commissioners IN OPEN
(Governing Body)
MEETING ASSEMBLED IN THE CITY OF Concord, NORTH CAROLINA,
THIS 17th DAY OF July, 2023, AS FOLLOWS:

1. That the project referenced above is in the best interest of the Governing Body and the general public; and
2. That Sergeant Grady Christie
(Name and Title of Representative)
is authorized to file, on behalf of the Governing
Body, an application contract in the form prescribed by the Governor's Highway Safety Program for federal
funding in the amount of \$ 125,874.00
(Federal Dollar Request) to be made to the Governing Body to assist in defraying
the cost of the project described in the contract application; and
3. That the Governing Body has formally appropriated the cash contribution of \$ 53,946.00 as
(Local Cash Appropriation)
required by the project contract; and
4. That the Project Director designated in the application contract shall furnish or make arrangement for other
5. appropriate persons to furnish such information, data, documents and reports as required by the contract, if
approved, or as may be required by the Governor's Highway Safety Program; and
6. That certified copies of this resolution be included as part of the contract referenced above; and
7. That this resolution shall take effect immediately upon its adoption.

DONE AND ORDERED in open meeting by _____
(Chairperson/Mayor)

ATTESTED BY _____
(Clerk)

SEAL

DATE July 17, 2023

Date: 7/17/2023

Amount: 125,874.00

Dept. Head: Sheriff Van W. Shaw

Department: 2110 - Sheriff's Office

☐ Internal Transfer Within Department

☐ Transfer Between Departments/Funds

☒ Supplemental Request

PURPOSE: This is the SECOND year of 5 year Traffic Safety Grant. FY 2024
Required to create a budget for the Traffic Grant beginning 10/1/2023 and record the County's 30% match.
In Fiscal Year 2023, the Cabarrus County Sheriff's Office applied for a Grant and expects to receive funding through the Governor's Highway Safety Program (GHSP) for the formation of a Traffic Safety Unit for use in problem areas throughout Cabarrus County. This is a three year grant through the North Carolina Department of Transportation. This request is for approval of the allocation of year one of three those funds in accordance with the agreement (attached). This grant is federally funded up to 85% with a 15% local match in this the first year. This grant is federally funded up to 70% with a 30% local match in this the second year. The 30% local match includes personnel costs (salary and fringe) for 2 deputies, and travel and training. This grant is a 3 year commitment for the county with the increase in local match increasing up to 50% in the third year.

Fund	Indicator	Department/ Object/ Project	Account Name	Approved Budget	Increase Amount	Decrease Amount	Revised Budget
001	6	2110-6342-TRAFU	NC Dept of Transportation Grant	-	125,874.00		125,874.00
001	9	2110-9101-TRAFU	Salary & Wages - TRAFU	-	116,960.45		116,960.45
001	9	2110-9201-TRAFU	Social Security - TRAFU		7,251.55		7,251.55
001	9	2110-9202-TRAFU	Medicare - TRAFU		1,695.93		1,695.93
001	9	2110-9205-TRAFU	Group Hospital Insurance - TRAFU		21,360.00		21,360.00
001	9	2110-9206-TRAFU	Vision Care - TRAFU		41.32		41.32
001	9	2110-9207-TRAFU	Life Insurance - TRAFU		66.00		66.00
001	9	2110-9210-TRAFU	Retirement - TRAFU		15,251.64		15,251.64
001	9	2110-9230-TRAFU	Workers' Compensation - TRAFU		2,771.96		2,771.96
001	9	2110-9235-TRAFU	Deferred Compensation 401K - TRAFU		5,848.02		5,848.02
001	9	2110-9640-TRAFU	Insurance & Bonds - TRAFU		2,573.14		2,573.14
001	9	2110-9610-TRAFU	Travel - TRAFU		6,000.00		6,000.00

\$ 179,820.00

\$ (125,874.00)

\$ 53,946.00

305,694.00

Total

305,694.00

Budget Officer

☐ Approved

☐ Denied

County Manager

☐ Approved

☐ Denied

Board of Commissioners

☐ Approved

☐ Denied

Signature

Signature

Signature

Date

Date

Date

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Sheriff's Office - Awarding of Service Weapon to Deputy Michael Elliott Upon his Retirement

BRIEF SUMMARY:

Deputy Michael Elliott will retire from the Cabarrus County Sheriff's Office on July 31, 2023. Pursuant to N.C.G.S. 20-187.2, it is requested that Deputy Elliott's service weapon (Sig Sauer P320 .40 cal serial # 58C352203) be designated surplus property and awarded to him for a price of \$1 upon his retirement.

REQUESTED ACTION:

Motion to declare Sig Sauer P320 .40 caliber, SN 58C352203, surplus property and authorize disposition in accordance with the County's policy.

EXPECTED LENGTH OF PRESENTATION:

1 Minute

SUBMITTED BY:

Chief Deputy Tessa Burchett

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▣ Surplus Form
- ▣ Firearm Receipt



Cabarrus County Asset Transfer, Surplus, Demolition Form

Action: Retire/Sold

Date: 7/31/2023

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	58C352203
Description	Sig Sauer P320

TO

Name	Michael Elliott
Department	Sheriff's Office
Location	993 Broacton Drive Concord, NC
Reason	Deputy Michael Elliott 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: 6-14-23

Assistant County Manager:

Date: 6-14-23

Chief Procurement Officer:

Date: 6-15-23

County Manager:

Date: 6-15-23

RECEIPT		DATE <u>6/14/23</u>	No. <u>072947</u>
RECEIVED FROM <u>Michael Elliott</u>		\$ <u>1.00</u>	
<u>Sig Saver P320 58C352203</u>		DOLLARS	
<input type="radio"/> FOR RENT <input type="radio"/> FOR _____			
ACCOUNT			<input type="radio"/> CASH <input type="radio"/> CHECK <input type="radio"/> MONEY ORDER <input type="radio"/> CREDIT CARD
PAYMENT			FROM _____ TO _____
BAL. DUE			BY <u>Sarah Lettin</u>

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Solid Waste - Landfill - Replacement of Landfill Compactor

BRIEF SUMMARY:

The purchase of a landfill compactor is included in the Capital Improvement Plan funded projects for FY2024. Pursuant to NCGS 143-129 staff requests to piggyback the bid of Gaston County who purchased a landfill compactor in May, 2023. It was purchased from Sun Machinery Company in Lexington, SC for a total cost of \$860,250.00.

REQUESTED ACTION:

Motion to authorize the purchase of one (1) landfill compactor from Sun Machinery Company utilizing the referenced Gaston County bid.

EXPECTED LENGTH OF PRESENTATION:

1 Minute

SUBMITTED BY:

Kevin Grant, Environmental Management Director

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▢ Cabarrus Bid Notification
- ▢ Gaston Co Compactor Purchase Order
- ▢ Gaston County Board Action - Compactor
- ▢ Gaston County Bid Notification
- ▢ Approval Letter
- ▢ Wagner Compactor Picture



**AWARDING A CONTRACT TO
SUN MACHINERY COMPANY
FOR LANDFILL COMPACTOR
BY PIGGYBACKING A BID AWARDED
PREVIOUSLY BY
GASTON COUNTY
NORTH CAROLINA**

Pursuant to North Carolina General Statute 143-129 notice is hereby given that at the regularly scheduled meeting on July 17, 2023, the Board of Commissioners of Cabarrus County, North Carolina will consider a request from the Cabarrus County Solid Waste Management Department to piggyback the purchase of a Wagner LC90 Landfill Compactor bid awarded by Gaston County, North Carolina to Sun Machinery Company, Lexington, South Carolina.

Written inquiries relative to the proposed intent should be directed to Thomas Nunn, Chief Procurement Officer, Cabarrus County Manager's Office, PO Box 707, Concord, North Carolina 28026-0707. Interested citizens may also inquire by telephone at (704) 920-2888, Monday through Friday, between the hours of 8:00am and 5:00pm or personally inquire at the Chief Procurement Officer's office which is located in the County Manager's Department on the second floor of the Cabarrus County Government Center, 65 Church Street, SE, Concord, North Carolina.

This notice is hereby given this date, June 30, 2023.

Kevin Grant
Environmental Management Director
Cabarrus County, North Carolina



Purchase Order

Fiscal Year 2023

Page: 1 of: 1

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Gaston County Landfill
3155 Philadelphia Church Road
Dallas, NC 28034-7698

Purchase Order # **23000948-00**
P.O. Date **05/11/2023**

Delivery must be made within doors of
specified destination.

V
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SUN MACHINERY COMPANY
206 TWO NOTCH RD
LEXINGTON, SC 29073

S
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Gaston County Landfill
3155 Philadelphia Church Road
Dallas, NC 28034-7698

Requisition Number		Date Required	Delivery Reference				
1295							
Vendor Number		Vendor Phone Number		Vendor Email		Contract Number	
7974							
Item#	Description/PartNo			QTY	UOM	Unit Price	Extended Price
	Wagner LC90 Compactor The Above Purchase Order Number Must Appear On All Invoices, Packing Lists and Correspondence. Gaston County PO Terms & Conditions are listed on the last page of this PO and are also available at http://www.gastongov.com/POTerms . Vendor agrees to these referenced Terms & Conditions.						
1	Wagner LC90 Compactor GL Account: 6000- SWS-380-00000-000000-00000000-00 00-08-540012-			1.00	EA	860,250.00	860,250.00

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

By: Beth B. Griffiths
Purchasing Manager

PO Total	\$860,250.00



Gaston County

Gaston County
Board of Commissioners
www.gastongov.com

Public Works

Board Action

File #: 23-160

Commissioner Cloninger - Public Works - To Approve a Bid Award and the Purchase of a New Landfill Compactor from Sun Machinery Company, Lexington, SC (\$860,250.00) and Appropriate Funds from the Solid Waste Fund Balance

STAFF CONTACT

Dan Ziehm - Public Works Director - 704-862-6795

BUDGET IMPACT

No additional County Funds.

BUDGET ORDINANCE IMPACT

Solid Waste Fund Balance Appropriated.

BACKGROUND

The Solid Waste and Recycling Division has been dealing with delayed repairs and replacements with large, heavy equipment utilized at the landfill for the last 3 years. Due to many global supply chain issues, these problems are persisting. The Division went through the Capital Improvement Plan (CIP) process during March 2022 to purchase a new landfill compactor. Due to unforeseen circumstances in the heavy equipment manufacturing industry, that equipment was on a 2-year delivery delay. That delay, when coupled with inability to find parts for repairs, has caused the need to purchase another landfill compactor. Also, due to the extended delay in deliveries, the Division wants to be proactive in ensuring the needs of the facility are met and service can be provided daily. During CIP discussions this fiscal year, the Division submitted a request to purchase a new compactor. After discussion with the CIP Committee, it was proposed that the Division proceed with purchasing a new compactor as quickly as possible to help alleviate the strains on the remaining equipment fleet.

A bid advertisement was published in the Charlotte Observer on March 19, 2023. The bid was also posted on the County's website and on HUBSCO.

(Continued on Page 2)

DO NOT TYPE BELOW THIS LINE

I, Donna S. Buff, Clerk to the County Commission, do hereby certify that the above is a true and correct copy of action taken by the Board of Commissioners as follows:

NO.	DATE	M1	M2	CBrown	CCLoninger	AFraley	BHovis	KJohnson	TKeigher	RWorley	Vote
2023-145	04/25/2023	BH	KJ	A	A	A	A	A	AB	A	U

DISTRIBUTION:

Laserfiche Users

File #: 23-160

Commissioner Cloninger - Public Works - To Approve a Bid Award and the Purchase of a New Landfill Compactor from Sun Machinery Company, Lexington, SC (\$860,250.00) and Appropriate Funds from the Solid Waste Fund Balance
Page 2

On March 31, 2023, a total of five (5) bids were received. Results of the bids are as follows:

<u>Vendor</u>	<u>Make/Model</u>	<u>Price</u>
National Equipment Dealers, LLC	TANA H380	\$926,200.97
National Equipment Dealers, LLC	TANA H555	\$1,211,912.34
Sun Machinery Company	Wagner LC90	\$860,250.00
Linder Industrial Machinery	Bomag BC873 RB-5	\$991,585.00
Carolina Tractor & Equipment Company	CAT 826	\$1,093,789.00

Based on the bids received, staff recommends Sun Machinery Company, 206 Two Notch Road, Lexington, SC 29073 as the apparent lowest, responsive, responsible bidder. Approval of this Board Action and associated Budget Change Request, formally accepts Sun Machinery Company, Lexington, SC as submitting the lowest, responsible, responsive bid and authorizes staff to purchase said landfill compactor at a purchase price of \$860,250.00 after appropriating funds from the Solid Waste Fund Balance.

POLICY IMPACT

N/A

ATTACHMENTS

Budget Change Request (BCR)

Bid Title:	Purchase of New Landfill Compactor
Category:	Public Works
Status:	Closed

Description:

Sealed bids accepted for the Purchase of a New Landfill Compactor for Gaston County Public Works – Environmental Services Division. Bid prices are guaranteed at least through May 31, 2023.

Addendum # 1: Item 10 (a) "Overall Machine- Machine to be manufactured in the U.S.A."- will be removed from the bid specifications and shall NOT apply.

Publication Date/Time:

3/17/2023 9:00 AM

Closing Date/Time:

3/31/2023 2:00 PM

Submittal Information:

Sealed Bids

Bid Opening Information:

03/31/2023

Addendum Date/Time:

03/24/2023

Contact Person:

Marcie Smith at Marcie.Smith@gastongov.com or 704-922-0267

Business Hours:

8:00- 4:30

Qualifications:

Any resulting purchase shall comply with all applicable laws, regulations, executive orders, and terms and conditions.

Miscellaneous:

Refer to bid documents for delivery and postal instructions. Only sealed bids will be accepted. Bids received after this time/date will not be accepted. Bids will be publicly opened at this time in the Landfill Scale House Conference Room, Gaston County Landfill, 3155 Philadelphia Church Road, Dallas, NC 28034.

The Gaston County Board of Commissioners reserves the right to accept or reject bids pursuant to provision of N. C. General Statutes 143-129, and to reject any or all bids only for sound documented reasons.

[Return To Main Bid Postings Page](#)

 Government Websites by [CivicPlus®](#)

SUN MACHINERY

Cabarrus County Landfill
4441 Irish Potato Road / P.O. Box 707
Concord, N.C. 28026
Attention Randall Foster

June 23, 2023

Wagner, a Division of Allied Systems Co., and Sun Machinery Co. has approved the option to do the piggyback purchase option on the bid request from Gaston County N.C. for one new Wagner landfill compactor model LC90 90,000LB. **weight class. Gaston County purchase order number 23000948-00 date of issue 05/11/ 2023.**

Landfill Compactor Specifications.

Wagner model LC90 landfill compactor, weight 90,000 lb. High compaction wheels with big dog cleats option for cleaner teeth.

See through 14 ft. 2 in. Semi-U trash blade.

Two speeds H.D. modulated transmission.

Cummins 430 H.P. tier 4 final diesel engine.

Extra - large high visibility operators cab with two doors for easy access from either side of compactor with air ride seat & pressurized and filtered climate control cab with joystick controls.

Center frame oscillation for maximum compaction plus 40 degrees of articulation. The cooling system includes a swing out reversible fan for easy access for cleaning. Warranty, 1 year, 4000-hour standard full machine factory warranty, also included is a 5-year 10,000-hour Cummins engine warranty.

See brochure for additional features and standard equipment.

Base machine cost.	\$757,500.00
Add these options to base machine cost.	
Central automatic lubrication system.	\$9,700.00
Fire suppression, automatic system.	\$16,000.00
Wheel cleaner teeth and bar system.	\$17,850.00
Extended power train warranty (5 yr. /10,000 hour.)	\$59,200.00
Base machine cost with the above options:	\$860,250.00
Sales tax excluded F.O.B. Cabarrus County Landfill N.C.	

Page 1

SUN MACHINERY

Note this proposal is good for 60 days. Estimated delivery
60 days from receipt of purchase order.

Thank you,

Charles King
Sales Manager Landfill Compactors
Sun Machinery Co.



- Front chassis oscillation 15° each way
- Large cab w/ air ride seat, optional trainer's seat, and joystick steering
- Double reduction planetary axles
- Choice of wheel and cleat design (optional wheel cleaners)
- Rugged durability with chassis and components designed for long life



CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Discussion Items for Action

SUBJECT:

Tax Administration - Tax Collector's Annual Settlement and Order Authorizing Collection of FY 2023-2024 Taxes

BRIEF SUMMARY:

The Tax Collector is required by NCGS 105-373 to give an annual settlement on current and delinquent taxes to the governing body for review and approval. The settlement report for fiscal year 2022-2023 is attached. This report contains real and personal taxes that remain unpaid for the fiscal year. These lists are recharged to the Tax Collector for collection. Also attached is the Order to Collect to be executed by the Chairman of the Board of County Commissioners authorizing the Tax Collector to collect all FY 2023-2024 property taxes.

REQUESTED ACTION:

Motion to accept the Tax Collector's annual settlement and approve the Order to Collect in accordance with NCGS 105-321.

EXPECTED LENGTH OF PRESENTATION:

5 Minutes

SUBMITTED BY:

David Thrift, Tax Administrator

BUDGET AMENDMENT REQUIRED:

No

COUNTY MANAGER'S RECOMMENDATIONS/COMMENTS:

ATTACHMENTS:

- ▯ 2023 Order to Collect
- ▯ 2022 AR Real Personal
- ▯ 2023-2024 Tax Levy Final

ORDER OF THE BOARD OF COUNTY COMMISSIONERS

IN ACCORDANCE WITH N.C.G.S. 105-321

To: M David Thrift
Tax Administrator, Cabarrus County

You are hereby authorized, empowered, and commanded to collect the 2023 property taxes filed in the office of the Cabarrus County Tax Assessor, and in the receipts herewith delivered to you, in the amounts and from the taxpayers likewise set forth. Such taxes are hereby declared to be a first lien upon all real property of the respective taxpayers in the County of Cabarrus, and this order shall be a full and sufficient authority to direct, require and enable you to levy on and sell any real or personal property of such taxpayer, for and on account thereof, in accordance with the law.

Witness my hand and official seal, this 17th day of July 2022.

Stephen M Morris, Chairman
Cabarrus County Board of Commissioners

Attest:

Lauren Linker, Clerk to the Board

CABARRUS COUNTY
OUTSTANDING REAL, PERSONAL AND DMV BILLS
TAX YEAR 2022
At June 30, 2023

Name	REAL & PERSONAL		DMV		Total Outstanding
	Ad Valorem	Penalties	Ad Valorem	2022 Tax Bills	
County & Municipalities:					
Cabarrus County	\$ 1,471,525	\$ 74,456	\$ -	\$ 1,545,981	
City of Kannapolis	\$ 271,221	\$ 2,004	\$ -	\$ 273,225	
Town of Mt Pleasant	\$ 9,372	\$ 52	\$ -	\$ 9,424	
Town of Midland	\$ 12,988	\$ 137	\$ -	\$ 13,125	
City of Locust	\$ 126	\$ -	\$ -	\$ 126	
City of Concord	\$ 450,003	\$ 43,927	\$ -	\$ 493,930	
Town of Harrisburg	\$ 20,772	\$ 391	\$ -	\$ 21,163	
Fire Districts:					
Kannapolis Rural	\$ 6,052	\$ 4	\$ -	6,056	
Jackson Park	\$ 1,232	\$ 17	\$ -	\$ 1,249	
Cold Water	\$ 4,688	\$ 185	\$ -	4,873	
Allen	\$ 7,956	\$ 167	\$ -	\$ 8,123	
Midland	\$ 2,558	\$ 33	\$ -	2,591	
Harrisburg (Outside)	\$ 10,196	\$ 44	\$ -	\$ 10,240	
Rimer	\$ 2,060	\$ 4	\$ -	2,064	
Mt Mitchell	\$ 1,538	\$ 4	\$ -	\$ 1,542	
Odell	\$ 4,742	\$ 14	\$ -	4,756	
Georgeville	\$ 2,492	\$ 35	\$ -	\$ 2,527	
Flowes Store	\$ 3,369	\$ 35	\$ -	3,404	
Northeast	\$ 2,866	\$ 9	\$ -	\$ 2,875	
Mt Pleasant	\$ 5,773	\$ 40	\$ -	5,813	
Gold Hill	\$ 623	\$ 0	\$ -	\$ 623	
Richfield	\$ 45	\$ 0	\$ -	45	
Harrisburg (Inside)	\$ -	\$ -	\$ -	\$ -	
Concord Rural	\$ 188	\$ 9	\$ -	197	
Totals	\$ 2,292,385	\$ 121,568	\$ -	\$ 2,413,953	

2023-2024

AMOUNT CHARGED TO
COLLECT FOR FISCAL YEAR
2023-2024 REAL AND PERSONAL PROPERTY
AS OF JULY 17, 2023

Jurisdiction	Principal	Penalty	Total
COUNTY	\$212,794,986.20	\$310,859.27	\$213,105,845.47
HARRISBURG CITY TAX	\$12,397,390.26	\$13,762.85	\$12,411,153.11
CONCORD CITY TAX	\$70,047,709.24	\$119,822.89	\$70,167,532.13
MT PLEASANT CITY TAX	\$872,038.31	\$1,373.64	\$873,411.95
KANNAPOLIS CITY TAX	\$29,927,748.23	\$43,403.10	\$29,971,151.33
LOCUST CITY TAX	\$319,922.97	\$73.68	\$319,996.65
MIDLAND CITY TAX	\$1,269,488.94	\$1,304.78	\$1,270,793.72
HUNTERSVILLE CITY TAX	\$720.37	\$0.00	\$720.37
Fire Districts			
KANNAPOLIS FIRE - RURAL	\$203,589.76	\$58.27	\$203,648.03
JACKSON PARK FIRE TAX	\$214,233.57	\$402.07	\$214,635.64
COLD WATER FIRE TAX	\$296,213.18	\$197.24	\$296,410.42
ALLEN FIRE TAX	\$604,453.86	\$1,690.07	\$606,143.93
MIDLAND FIRE TAX	\$1,103,029.67	\$681.38	\$1,103,711.05
HARRISBURG FIRE RURAL	\$1,140,981.06	\$401.87	\$1,141,382.93
RIMER FIRE TAX	\$270,793.92	\$383.10	\$271,177.02
MT MITCHELL FIRE TAX	\$113,698.53	\$142.67	\$113,841.20
ODELL FIRE TAX	\$940,604.16	\$654.54	\$941,258.70
GEORGEVILLE FIRE TAX	\$260,275.26	\$204.52	\$260,479.78
FLOWES STORE FIRE TAX	\$243,136.31	\$220.13	\$243,356.44
NORTHEAST FIRE TAX	\$180,797.28	\$139.15	\$180,936.43
MT PLEASANT FIRE TAX	\$544,217.26	\$1,316.52	\$545,533.78
GOLD HILL FIRE TAX	\$46,698.95	\$48.84	\$46,747.79
RICHFIELD FIRE TAX	\$10,214.77	\$3.70	\$10,218.47
CONCORD RURAL FIRE TAX	\$43,022.56	\$127.05	\$43,149.61
Special			
CONCORD DOWNTOWN TAX	\$193,519.35	\$414.52	\$193,933.87
LOCUST SOLID WASTE	\$27,840.00		\$27,840.00
HUNTERSVILLE SOLIS WASTE	\$154.00		\$154.00
Total	\$334,067,477.97	\$497,685.85	\$334,565,163.82

This levy may be adjusted through discoveries and releases throughout the tax year.

CABARRUS COUNTY



BOARD OF COMMISSIONERS WORK SESSION

**July 10, 2023
4:00 PM**

AGENDA CATEGORY:

Approval of Regular Meeting Agenda

SUBJECT:

BOC - Approval of Regular Meeting Agenda

BRIEF SUMMARY:

The proposed agenda for the July 17, 2023 regular meeting is attached.

REQUESTED ACTION:

Motion to approve the agenda for the July 17, 2023 regular meeting 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:

- Regular Meeting Agenda

CABARRUS COUNTY



BOARD OF COMMISSIONERS REGULAR MEETING

**July 17, 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 OF THE AGENDA

B. RECOGNITIONS AND PRESENTATIONS

1. Recognition - Commissioner Barbara Strang

C. INFORMAL PUBLIC COMMENTS

D. 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. Appointment and Removal - Senior Center Advisory Council
2. Appointment and Removals - Juvenile Crime Prevention Council (JCPC)
3. County Manager - Easement for Duke Energy on Kannapolis Middle School Property
4. Department of Human Services - Approval of Medicaid Expansion Positions
5. Department of Human Services - Energy Programs Outreach Plan
6. Finance - Occupancy Tax Late Penalty Waiver Requests
7. Infrastructure and Asset Management -Cabarrus County Behavioral Health Center Project Update

8. Infrastructure and Asset Management -Vietnam Veterans Park Land Lease Amendment
9. Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 4040 Mills Circle, Further Identified as PIN 5651-14-2940
10. Legal - Ad Hoc Amendment to Central Area Land Use Plan Interlocal Agreement for 3868 Highway 200, Further Identified as PIN 5547-87-8632
11. Legal - Central Area Land Use Plan Interlocal Agreement Update
12. Sheriff's Office - Acceptance of Governor's Highway Safety Program (GHSP) Grant Award
13. Sheriff's Office - Awarding of Service Weapon to Deputy Michael Elliott Upon his Retirement
14. Solid Waste - Landfill - Replacement of Landfill Compactor
15. Tax Administration - Tax Collector's Annual Settlement and Order Authorizing Collection of FY 2023-2024 Taxes
16. Tax Administration - Refund and Release Reports – June 2023

E. NEW BUSINESS

1. Department of Human Services - Transportation Disadvantaged Business Enterprise (DBE) Goal Public Hearing

F. REPORTS

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

G. GENERAL COMMENTS BY BOARD MEMBERS

H. WATER AND SEWER DISTRICT OF CABARRUS COUNTY

I. CLOSED SESSION

J. ADJOURN

Scheduled Meetings

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
September 5	Work Session	4:00 p.m.	Multipurpose Room
September 18	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.