

Town of Mineral Springs
Mineral Springs Town Hall
3506 S Potter Road ~ Mineral Springs
Town Council
Public Hearing / Regular Meeting
June 10, 2021
7:30 P.M.
AGENDA

1. Opening

The meeting will be called to order, an invocation will be delivered, a moment of silence in memory of Councilwoman Peggy Neill will be observed, and the Pledge of Allegiance will be recited.

2. Public Hearing – 2021-2022 Proposed Budget

3. Public Comments

The town council will hear comments from members of the public on any matters of interest to them during this ten-minute period.

4. Consent Agenda – Action Item

- A. April 2021 Tax Collector's Report
- B. April 2021 Finance Report

5. Consideration of a Resolution Honoring Councilwoman Peggy Neill – Action Item

The council will consider adopting a resolution (R-2021-05) in memory and honor of Councilwoman Peggy Neill.

6. Consideration of Copper Run Subdivision Road Right-of-Way Maintenance – Action Item

The council will consider a funding contribution to the Copper Run Homeowners Association to offset their cost of mowing the right-of-way on town property.

7. Consideration of Taylor and Son Landscaping Contract for Town Hall – Action Item

The council will consider an annual agreement with Taylor and Son Landscaping for town hall.

8. Benchmark Planning Land Use Plan Scope of Services Quote – Action Item

The council will discuss and consider the Benchmark Planning Scope of Services quote for updating the Land Use Plan.

9. Consideration of the 2020-2021 Nonprofit Contributions – Action Item

The council will consider the 2020-2021 nonprofit contributions.

10. Consideration of Adopting the 2021-2022 Budget Ordinance – Action Item

The council will consider adopting the 2021-2022 budget ordinance.

11. Staff Updates

The staff will update the council on any developments that may affect the town.

12. Other Business

13. Adjournment

Town of Mineral Springs

PROPOSED BUDGET 2021-2022 (Revised 5/13/2021)

Prepared for:

The Mineral Springs Town Council

By:

Frederick Becker III
Budget Officer

June 10, 2021

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FY2021-22 PROPOSED BUDGET
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**TOWN OF MINERAL SPRINGS
2021-2022 BUDGET**

MESSAGE FROM THE BUDGET OFFICER

I hereby present this recommended budget for the 2021-2022 fiscal year to the Mineral Springs town council.

The FY2021-22 budget reflects anticipated revenues and expenditures of \$364,215.00 including capital expenditures, which represents a \$12,735.00 increase over last year's final budget. General government expenditures total \$333,166.00, an increase of \$4,091.00, while the capital budget has increased by \$8,644.00 to \$31,049.00*.

In the "Community" department, we are proposing a \$4,800.00 decrease, due mostly to the cancellation of the Fall Festival originally scheduled for September 11, 2021. There is a proposed 3% increase for employees, both salaried and hourly, but there is no change to the salaries of the town council and mayor, which will remain at \$150/month and \$400/month respectively*. "Employee Overhead" will increase by \$2,500.00 over the FY2020-21 appropriation*. There will be a municipal election on November 2, 2021, so an appropriation of \$3,300.00 for "Elections" has been included. Most other proposed operating expenditures are very close to their previous year's level.

The revenue side of the budget reflects a property tax base of approximately \$372.8 million, an increase of approximately \$97.2 million over the FY2020-20 tax base. Most of this increase is due to the countywide real property revaluation conducted by Union County. As a result, we have calculated a theoretical revenue-neutral tax rate as required by NC G.S. §159-11(e) and have lowered the proposed property tax rate accordingly. These calculations are presented on pages 16 – 17. Vehicle property taxes are expected to decrease slightly due to the reduced tax rate even though the vehicle tax base has increased slightly. General sales and use tax revenues increased unexpectedly last year, and we expect them to remain close to last year's. Other sales taxes should remain close to last year's. The estimate of the town's overall state-shared sales-tax revenue stream has been increased from \$264,410.00 to \$271,925.00.

As always, Council is cautioned to view all sales taxes as being somewhat unstable, as demonstrated by the effect the COVID-19 slowdown had on some of these revenues. Even though the electricity sales tax has become more stable due to 2013 changes in state tax laws, it is a large revenue stream that is not under direct control of the town and is sensitive to overall economic conditions.

I am pleased to recommend a 0.4-cent reduction in the property tax rate. The proposed *ad valorem* tax rate for the 2021-22 fiscal year is 2.1 cents per \$100, down from 2.5 cents.


Frederick Becker III, Budget Officer

May 6, 2021
Date

*Council approved changes on May 13, 2021 (see Page 5). These changes affected "Office", "Employee Overhead", and "Capital".

TOWN OF MINERAL SPRINGS 2021-2022 BUDGET

BUDGET INTRODUCTION

FUND ACCOUNTING

The accounts of the Town of Mineral Springs are organized and operated on the basis of *funds*. A fund is a grouping of related accounts that have been segregated for specific activities or objectives.

Funds used by local governments can be grouped into two types: *governmental funds* and *proprietary funds*. Governmental funds are simply used to account for most governmental-type activities and are primarily financed by tax revenues. Proprietary funds are used for activities that operate more like businesses, such as water or sewer operations, where expenses are primarily financed by revenues derived from user charges rather than tax dollars. Mineral Springs currently uses only governmental funds, primarily a single *General Fund* and, when needed, *Capital Project Funds*.

General Fund

The General Fund encompasses most of the town's day-to-day operations. Property taxes are one component of General Fund revenue. Other important General Fund revenue sources are various sales taxes and excise taxes that are distributed to the town by the North Carolina Department of Revenue. Finally, specific user charges such as permit fees are accounted for as General Fund revenues.

All general operating expenditures are budgeted and accounted for in the General Fund. In addition, capital expenditures (purchases of real and personal property assets that have multi-year service lives) are likewise budgeted and accounted for in the General Fund. Mineral Springs considers expenditures for fixed assets with a value greater than five hundred

dollars (\$500.00) to be capital expenditures.

Capital Project Funds

Capital Project Funds are used to budget and account for larger capital expenditures that may take place over more than one fiscal year. A large or multi-year capital project is authorized by a *Capital Project Ordinance* adopted by the town council, and the project is financed through a related Capital Project Fund. The Capital Project Fund may receive transfers from the General Fund, or it may receive funds from other revenue sources such as grants or bond proceeds.

In recent years, the Town of Mineral Springs has established Capital Project Funds to construct the town hall, to purchase real property for conservation and recreation utilizing a North Carolina Clean Water Management Trust Fund grant, to purchase and undertake initial repairs on the historic Mineral Springs School agriculture building, to construct a parking area and trailhead for the Mineral Springs Greenway, and to construct a small park adjacent to the town hall.

Capital Project Fund expenditures are not included in the General Fund budget, but NC G.S. §159-13.2(f) states that “[e]ach year the budget officer shall include in the budget information in such detail as he or the governing board may require concerning each grant project or capital project (i) expected to be authorized by project ordinance during the budget year and (ii) authorized by previously adopted project ordinances which will have appropriations available for expenditure during the budget year.” The Town of Mineral Springs currently has no open Capital Project Ordinances.

BUDGET PREPARATION

The town of Mineral Springs operates on a *fiscal year* that runs from July 1 through June 30. The annual budget process begins with the budget officer working with departmental staff to estimate operating expenditures for the next fiscal year. These estimates usually begin in March. The following schedule has been established for the Mineral Springs fiscal year 2021-2022 budget preparation and enactment process:

April 8, 2021: Suggested departmental appropriations are presented to the town council at its regular meeting. No revenue estimates are presented at this time. Council is asked to review the budget officer's draft appropriations worksheet and advise him of any changes.

May 13, 2021: Prior to the town council's regular May meeting, the budget officer completes his estimates of anticipated revenues for the upcoming fiscal year and incorporates these estimates plus Council's recommended departmental expenditures into the *Recommended (or Proposed) Budget*. The Recommended Budget contains information on prior-year budgets, a detailed departmental revenue and expenditure breakdown, an analysis of those figures, a *draft FY2021-22 budget ordinance*, and a *budget message* that provides a brief overview of the proposed budget. The draft budget ordinance also includes a recommended property tax rate. The budget officer must file a copy of the recommended budget with the town clerk on the day it is submitted to Council.

Council may make additional changes to the recommended budget, and then by motion will call for a public hearing on the budget. The town clerk will then advertise the time and place of that hearing, as well as stating in that advertisement that the budget is available for public inspection at the clerk's office. In Mineral Springs, the public hearing is generally conducted at the regular June town council meeting, and

the budget ordinance (subject to any additional changes) is then adopted by vote of the town council.

June 10, 2021: Council conducts the budget hearing and adopts a budget ordinance. North Carolina general statute also requires that copies of the adopted budget ordinance be filed in the offices of the town clerk, the budget officer, and the finance officer.

ADDITIONAL REQUIREMENT IN REAL PROPERTY REVALUATION YEARS

Counties in North Carolina are required by statute to conduct real-property revaluations on a regular basis in order to ensure that the assessed values of properties in the county reflect their actual value as closely as possible. Union County last conducted such a revaluation in 2015, and large changes in the values of real property since then necessitated another real-property revaluation in 2021.

In revaluation years, NC G. S. §159-11(e) requires budget officers to calculate a *revenue-neutral* tax rate and present those calculations in the Recommended Budget. The "revenue-neutral" property tax rate is the rate that would yield the same total tax revenue for the jurisdiction as was collected in the fiscal year prior to the revaluation, adjusted for year-over-year growth due to new development. Real property assessments in Union County increased substantially as a result of the revaluation, so the revenue-neutral tax rate would be lower than the previous year's tax rate. The Town of Mineral Springs is not required to adopt that revenue-neutral tax rate in the FY2021-22 budget, but that number serves as an additional piece of information that helps put the proposed property tax rate in perspective.

THE ROLE OF THE ANNUAL BUDGET ORDINANCE

Under the North Carolina Local Government Budget and Fiscal Control

Act, no expenditure may be made by the finance officer or any departmental personnel if that expenditure is not authorized in the adopted budget ordinance. It should be noted that the governing document is the *ordinance*, and not the more detailed departmental expenditure breakdown. For example, if the “Office” appropriation in the budget ordinance is \$149,844, and the detailed breakdown lists expenditures of \$2,400 for “equipment” and \$5,000 for “utilities”, it would be perfectly legal for the finance officer to make “equipment” expenditures of \$3,000 and “utility” expenditures of \$5,800 during the fiscal year, *provided the total of all expenditures in the “Office” category does not exceed \$149,844.*

Some local governments allow the finance officer to make transfers between departmental appropriations in the budget ordinance as necessary. The Mineral Springs town council does not grant the finance officer this authority. If the finance officer finds that upcoming expenditures would exceed an appropriation in the budget ordinance, he *must* prepare a *budget amendment* and present it to Council for approval. This process serves as another layer of internal control, ensuring that the ultimate responsibility for compliance with the adopted budget ordinance rests solely with the town council.

COUNCIL ACTION ON MAY 13, 2021: REVISIONS

After the Proposed Budget was presented on May 13, 2021, the Mineral Springs town council discussed and approved changes in elected official salaries for FY2021-22.

The town council compared the Mineral Springs council salaries to those of several “peer” municipalities. Fairview’s salaries are \$150/month, Wingate’s are proposed to be \$250/month for FY2021-22, Lake Park’s are proposed to be \$282.67/month, and Wesley Chapel’s are \$400/month.

Council voted to increase the Mineral Springs salaries from \$150/month to \$200/month, concluding that that would be reasonable and would keep Mineral Springs at the low end of the peer group. Council also voted to increase the mayor’s salary from \$400/month to \$500/month. There has been no increase in the Mineral Springs mayor’s salary for 13 years.

The finance officer will increase the “Office” departmental appropriation by \$4,800 to \$157,719 and will increase the “Employee Overhead” departmental appropriation by \$400 to \$35,400 to cover additional FICA employer contributions. The “Capital Outlay” appropriation will decrease by \$5,200 to \$25,849.

Council then voted to call for the required public hearing on the budget on June 10, 2021 at 7:30 PM at the Mineral Springs town hall. This revised budget will be considered for adoption after the public hearing.

STATE OF NORTH CAROLINA
TOWN OF MINERAL SPRINGS

**AN ORDINANCE TO ESTABLISH A BUDGET
FOR FISCAL YEAR 2021-2022
O-2020-02**

BE IT ORDAINED by the Council of the Town of Mineral Springs, North Carolina, the following:

Section I. Appropriations. The following amounts are hereby approved in the General Fund for the operation of the Town government and its activities for the fiscal year beginning 7/1/2021 and ending 6/30/2022, in accordance with a Chart of Accounts to be established for the Town:

ADMINISTRATIVE & GENERAL GOVERNMENT:	\$338,366.00
Advertising	\$1,800.00
Attorney	\$9,600.00
Audit	\$4,730.00
Charities and Agencies	\$10,545.00
Community Projects	\$26,000.00
Contingency	\$3,000.00
Elections	\$3,300.00
Employee Overhead	\$35,400.00
Fire Protection	\$12,000.00
Intergovernmental	\$15,000.00
Office and Administrative	\$157,719.00
Planning and Zoning	\$49,272.00
Street Lighting	\$1,200.00
Tax Collection	\$1,600.00
Training	\$3,000.00
Travel	\$4,200.00
CAPITAL:	\$25,849.00
Capital outlay	\$25,849.00
TOTAL APPROPRIATIONS:	\$364,215.00

Section II. Estimated Revenues. It is estimated that the following revenues will be available in the General Fund for the fiscal year beginning 7/1/2021 and ending 6/30/2022:

Property taxes	\$78,365.00
Interest	\$2,500.00
Other income	\$1,200.00
Sales taxes	\$271,925.00
Vehicle taxes	\$6,725.00
Zoning fees	\$3,500.00
TOTAL ESTIMATED REVENUES:	\$364,215.00

Section III. Property Tax Levy. A tax in the amount of \$0.021 per \$100.00 of assessed valuation is hereby levied on property within the Town of Mineral Springs which was listed for property taxes in Union County, North Carolina as of January 1, 2021.

ADOPTED this 10th day of June 2021. Witness my hand and official seal:

Frederick Becker III, Mayor

Attest:

Vicky A. Brooks, Clerk

REVENUES				\$ 364,215
<i>TOTAL INCOME</i>				<i>\$ 364,215</i>
Property Taxes			\$ 78,365	
Current Year	\$ 77,765			
Prior Years	\$ 600			
Interest			\$ 2,500	
Other Income			\$ 1,200	
Festival	\$ -			
Miscellaneous	\$ 1,200			
Sales Tax			\$ 271,925	
Alcoholic Beverage	\$ 13,145			
Electricity	\$ 208,000			
General Sales & Use	\$ 29,430			
Natural Gas Excise	\$ 950			
Telecommunications	\$ 2,400			
Video Programming	\$ 18,000			
Vehicle Taxes			\$ 6,725	
Zoning Fees			\$ 3,500	

EXPENDITURES				\$ 364,215
<i>ADMINISTRATIVE & GENERAL GOVERNMENT</i>				<i>\$ 338,366</i>
Advertising			\$ 1,800	
Attorney			\$ 9,600	
Audit			\$ 4,730	
Charities & Agencies			\$ 10,545	
Community			\$ 26,000	
Beautification, Maintenance	\$ 6,300			
Newsletter	\$ 2,700			
Special events	\$ 10,000			
Festival	\$ 5,000			
AMG	\$ 4,000			
Misc	\$ 1,000			
Park & Greenway Maint	\$ 7,000			
Contingency			\$ 3,000	
Elections			\$ 3,300	
Employee Overhead (FICA, work comp, bonds)			\$ 35,400	
Fire Protection			\$ 12,000	
Intergovernmental			\$ 15,000	
Intersection Study	\$ 5,000			
Construction Match	\$ 10,000			

Office				\$	157,719
Salary: Clerk		\$	39,648		
Salary: Deputy Clerk/Assistant		\$	12,300		
Salary: Finance Officer		\$	36,624		
Salary: Mayor		\$	6,000		
Salary: Council		\$	14,400		
Dues		\$	7,300		
Insurance		\$	4,000		
Records Management		\$	5,347		
Equipment & durable items		\$	2,400		
Supplies		\$	4,000		
Postage (General)		\$	1,000		
Telephone, Internet		\$	7,200		
Reserve/Misc		\$	1,000		
Town Hall Maintenance		\$	12,000		
Supplies	\$	2,000			
Services	\$	10,000			
Utilities		\$	4,500		
Planning				\$	49,272
Zoning Ord. & Planning		\$	5,000		
Zoning Administration		\$	36,272		
Salary	\$	34,272			
Contract	\$	2,000			
Land Use Planning		\$	5,000		
Reserve/Misc		\$	3,000		
Street Lighting				\$	1,200
Tax Collection				\$	1,600
Salary		\$	-		
Contract (Union County)		\$	1,600		
Postage		\$	-		
Billing		\$	-		
Training				\$	3,000
Boards		\$	1,000		
Officials		\$	1,000		
Staff (Clerk, TC, FO)		\$	1,000		
Travel Expenses				\$	4,200
<i>CAPITAL</i>					\$ 25,849
Capital Outlay				\$	25,849

Town of Mineral Springs
2021-2022 BUDGET ANALYSIS

I. Appropriations

Administrative & General Government

Advertising **\$1,800.00**
Included are required notifications of public hearings and special meetings involving the town council, planning board, and board of adjustment, and advertising in the 2022 Queen’s Cup Race Program. This appropriation is unchanged from last year.

Attorney **\$9,600.00**
This appropriation includes \$3,600.00 for retainer and general expense, and remains the same as last year’s appropriation.

Audit **\$4,730.00**
Kendra Gangal, CPA last year proposed an annual charge for audit services of \$4,730 over the following three years.

Charities & Agencies **\$10,545.00**
Council has approved this separate appropriation in the budget ordinance in order to bring more control and greater transparency to the town’s contribution to various local non-profits. The amount is calculated as 3% of the previous year’s total budget: $0.03 \times \$351,480.00 = \$10,544.40$, rounded to \$10,545.00.

Community **\$26,000.00**
This appropriation is to be used for projects and services intended to benefit the quality of life in Mineral Springs, including maintenance and beautification. Downtown pole banners and Christmas lights are included in this appropriation. The Community appropriation has been decreased by \$4,800.00 over last year’s appropriation, most of which is a result of the 2021 Fall Festival being canceled. An appropriation of \$5,000 has been included in the event that the town elects to conduct one or more “festival-like” activities later in the fiscal year. The service partnership with Artists Music Guild for music licensing, festival entertainment, and other event programming remains \$4,000.00.

Contingency **\$3,000.00**
This appropriation is intended to cover small unforeseen expenses in miscellaneous categories which might arise during the fiscal year. Access to Contingency funds is generally accomplished through the budget amendment process. The contingency appropriation will not necessarily be expended.

Elections **\$3,300.00**
There will be a municipal election on November 2, 2021 for which the town will be billed by Union County, and the estimated cost of \$3,300 is based on past experience.

Employee Overhead

\$35,400.00

Includes Scheduled bonds for Tax Collector at \$100.00, Clerk/Zoning Administrator at \$100.00, Finance Officer at \$450.00, workers compensation at \$2,500.00, FICA at \$11,000, NCLM benefits at \$1,800, and payroll processing at \$1,650. In addition, our required contribution to the NC Local Governmental Employees' Retirement System (NCLGERS) is estimated at \$17,800. This is a \$2,900 increase over last year, reflecting the increased FICA expenditures resulting from the staff and elected official salary increases, an NCLGERS increase from 14.85% to 16.05%, and small increases in rates for the NCLM insurance and workers compensation.

Fire Protection

\$12,000.00

Our regular annual payment to the Mineral Springs Volunteer Fire and Rescue Department remains \$10,000, and our Fire Suppression Agreement with the Waxhaw Volunteer Fire Department includes an annual payment of \$2,000.00.

Intergovernmental

\$15,000.00

The town has been working on a cooperative transportation program with Union County. The second phase of the Union County Critical Intersection Study has been completed, and \$2,500 of the \$5,000 planning portion of the appropriation was contributed by Mineral Springs for that study (which includes a Mineral Springs intersection) in FY2020-21. Another \$10,000 was proposed as an appropriation that could be used as a local match to NCDOT to expedite construction of one or more projects in the town. We are proposing the same levels for next year. These expenditures may not necessarily all be made during the upcoming fiscal year.

Office & Administration

\$157,719.00

We are proposing increasing the clerk's base salary to \$39,648.00 and the finance officer's base salary to \$36,624.00, representing a 3% cost-of-living and longevity increase. Council has re-authorized the part-time position of deputy clerk/office assistant for at least 12 hours per week, and Council has authorized increasing the hourly rate for that position to \$19.00/hr. This position has been budgeted at \$12,300 allowing for flexibility in the number of hours worked. Council salaries will increase to \$200.00 per month for FY2021-22, and the mayor's salary will increase to \$500.00 per month. Proposed expenditures for most routine office expenses and town hall overhead remain similar to last year's.

Planning

\$49,272.00

Council has recommended increasing the planning director/zoning administrator's salary by 3% to \$34,272.00. The proposed \$2,000.00 appropriation for contract services associated with providing assistance with administration from third parties remains the same as last year's. Included in that appropriation is an amount of \$1,254.40 to cover an interlocal agreement with Union County for joint funding of the Urban Forester position and the cost of contract enforcement by N-Focus of the town's abandoned swimming pool ordinance. The new Unified Development Ordinance has been completed but additional revisions are required for bringing the document into compliance with the state's new Chapter 160D legislation. \$5,000 is proposed to cover the costs of those

revisions. The \$5,000.00 allowance for land use plan updates and the \$3,000.00 allowance for miscellaneous expenditures, including clerical and mapping services, are the same as last year's. The planning director is currently seeking proposals for updating the land use plan.

Street Lighting **\$1,200.00**

This appropriation covers the cost of providing roadway lighting in the downtown area. This amount has been reduced by \$400 from last year's due to a rate reduction by Duke Energy.

Tax Collection **\$1,600.00**

Mineral Springs will continue operating under contract with Union County for property tax collection at a cost of 1.5% of the gross collections, which has worked very well for the town. Total commissions to Union County for FY2021-22 are estimated at \$1,600 which includes both current year and prior year collections. The current deputy clerk position will no longer include delinquent tax collection since the last of the prior-year taxes not subject to collection by Union County have either been collected or written off.

Training **\$3,000.00**

Ongoing training sessions for the governing board, citizen boards, and staff are offered throughout the year by the Institute of Government, the NC League of Municipalities, and other professional organizations.

Travel Expenses **\$4,200.00**

Included are expenses for travel to off-site training sessions, and any necessary meals and overnight accommodations. Also included are reimbursements for expenses incurred by council and staff in the course of ordinary business. This appropriation is the same as last year's; it is expected that there will be attendance at several clerk, planner, and elected official classes and conventions this fiscal year that will incur travel and lodging expenditures.

Capital

Capital Outlay **\$25,849.00**

These funds are designated for capital needs such as major equipment purchases, furniture and fixtures, and improvements to or purchases of real property.

II. Estimated Revenues

Interest Earned **\$2,500.00**

Short-term interest rates have continued to drop in response to Federal Reserve policy. Our Money Market account is currently earning only 0.10%; this has fallen from 0.69% a year ago. We have rolled over our 13-month CD and added another \$100,000 to it for a total deposit of \$300,000, but the new CD rate is 0.75% (down from 1.65%) and may fall further if we roll it over again this year. Although fund balance has continued to increase,

we anticipate total interest earned during FY2020-21 will fall short of budget by nearly \$2,000 and interest income for FY2021-22 will be even less.

Other **\$1,200.00**

This category covers various small-scale sources of revenue not accounted for in the other major categories. We anticipate refunds of North Carolina sales and use taxes paid by the town on purchases, and a few miscellaneous payments and fees such as copy charges. Zoning fees continue to be budgeted as a separate line item.

2021 Property Tax Receipts **\$77,765.00**

The estimated tax base has increased substantially due to Union County's property revaluation. Union County's estimate for real property is \$361,387,580 which we are reducing by 2.5% (\$9,034,690) to account for likely reductions as more appeals make it through the county's process. We estimate that our Public Service Property tax base will be \$5,596,953 based on last year's figure.

We are proposing an *ad valorem* tax rate of \$0.021/\$100, a reduction of 0.4¢ from last year's rate but 0.15¢ above the estimated revenue neutral rate.

Gross estimated tax levy must be reduced based on the collection rate for FY2019-20 as of June 30, 2020, which was 99.34% according to the Union County tax administrator.

The revenue estimate was arrived at as follows:

Real Property	\$361,387,580
Potential Appeals	-\$9,034,690
Personal Property	\$14,812,874
Public Service Property (est.)	\$5,596,953
Est. Real and Personal Tax Base	\$372,762,717

Tax rate: \$0.021/\$100 assessed valuation

Total levy: \$78,280.17

Estimated collection rate: 99.34% → \$77,763.52

Property Taxes, prior years **\$600.00**

We will receive some 2012 through 2020 delinquent tax payments from Union County. The total outstanding property taxes for that period will be approximately \$1,000, and we should expect Union County to collect over half of that. There will be no more collections of delinquent taxes from 2011 or earlier.

Sales Taxes **\$271,925.00**

Based on current fiscal year performance and accounting for anticipated economic conditions, the estimated breakdown is as follows:

Alcoholic Beverage tax	\$13,145.00
Electricity sales tax	\$208,000.00
General sales and use tax	\$29,430.00
Natural Gas excise tax	\$950.00

Telecommunications sales tax	\$2,400.00
Video Programming sales tax	\$18,000.00
Total	\$271,925.00

The amount of Alcoholic Beverage tax distributed to municipalities is *not* based on actual sales within the municipalities but instead is based solely on population. For 2019-20, municipalities where beer and wine sales were allowed received approximately \$4.29 per capita. The estimate of \$13,145.00 is arrived at by using the FY2019-20 Alcoholic Beverage Tax revenue with no increase since that is the most recent data available. Monthly General Sales and Use Tax revenues have actually increased during the current fiscal year in spite of COVID-19-related closures, and these revenues are now averaging approximately \$2,450/month. We believe that these collections will remain steady next fiscal year. The budget reflects an estimated \$8,030.00 increase from this fiscal year. As for the Electricity Sales Tax, the town’s largest revenue source, the amount has leveled off or even decreased slightly over the past few years. When North Carolina changed this tax from a franchise tax to a sales tax beginning in FY2014-15, the general assembly established FY2013-14 as the “baseline year” for this distribution. Sales tax on additional electricity consumption above this “baseline” amount is calculated by the same formula that General Sales and Use tax distributions are calculated: a formula that allocates the distribution based on the town’s percentage of the total property tax levy in the county. Because Mineral Springs has such a low tax base and tax rate, our levy is a very small percentage of the countywide levy and as a result incremental increases in Electricity Sales Tax distributions are very small. This year we are budgeting a \$1,000 increase in the anticipated Electricity Sales Tax distribution based on the average amount over the past few years. Telecommunications and Video Programming sales tax distributions have been treated this way for many years and have remained very flat over time, but we expect these revenue streams – particularly telecommunications – to decrease from last year. Overall, we are anticipating an increase of \$7,515.00 in sales tax revenue for FY2021-22.

Vehicle Taxes

\$6,725.00

Current-year vehicle taxes will all be collected by Union County via the state Vehicle Tax System in which property taxes are collected directly at the time of registration renewal. This amount reflects a collection rate of 98%, based on Union County’s estimate of the Mineral Springs vehicle tax base of \$32,675,834. In reality, the state-collected system yields a theoretical 100% collection rate for accounting purposes, since the way the system works the tax levy doesn’t exist until it is collected. Even so, some vehicles don’t get renewed, and some collections end up being refunded. Using a 98% collection rate is just an estimate reflecting these vehicles leaving the tax rolls.

Note that this revenue stream is down \$1,210 from last year’s vehicle tax levy even though the vehicle tax value estimate is the same as last year’s. This is due to the reduction in the property tax rate as a result of the county revaluation. Vehicle values are unaffected by property tax values, but the tax rate for vehicles must by state law be the same as the tax rate for other property.

Zoning fees

\$3,500.00

This estimate is based on the current rate of new construction both individually and in subdivisions (with only the Harrington Hall and McNeely Farms subdivisions actively building), plus additional zoning permits for accessory structures, garages, signs, and fences as well as miscellaneous applications for amendments, special use permits, and variances. Overall, zoning activity is expected to be similar to that of FY2020-21, which exceeded the \$2,500 budgeted amount.

**ANALYSIS OF PROPOSED FY2015-16 *AD VALOREM* TAX RATE
Compliance With NC G.S. § 159-11 (e)**

North Carolina General Statutes section § 159-11 (e) requires the following:

In each year in which a general reappraisal of real property has been conducted, the budget officer shall include in the budget, for comparison purposes, a statement of the revenue-neutral property tax rate for the budget. The revenue-neutral property tax rate is the rate that is estimated to produce revenue for the next fiscal year equal to the revenue that would have been produced for the next fiscal year by the current tax rate if no reappraisal had occurred. To calculate the revenue-neutral tax rate, the budget officer shall first determine a rate that would produce revenues equal to those produced for the current fiscal year and then increase the rate by a growth factor equal to the average annual percentage increase in the tax base due to improvements since the last general reappraisal. This growth factor represents the expected percentage increase in the value of the tax base due to improvements during the next fiscal year. The budget officer shall further adjust the rate to account for any annexation, deannexation, merger, or similar event.

I. Tax base for FY2020-21 and estimated tax base for FY2021-22

FY2020-21		FY2021-22	
Real	\$251,400,480	Real (county est.)	\$361,387,580
Personal	\$18,691,214	Personal (county est.)	\$14,812,874
Public Service	\$5,596,953	Public Service (est. unchanged)	\$5,596,953
Subtotal	\$275,688,647		\$381,797,407
Vehicles (est.)	\$32,675,834	Vehicles (county est.)	\$32,675,834
Total	\$308,364,481		\$414,473,241
Potential Reduction Due to Appeals (2.5% of Real Property, est.)			-\$9,034,690
Grand Total	\$308,364,481		\$405,438,551

II. Tax levy for FY2020-21 @ rate = \$0.025/\$100

Real, Personal, & Public Service	\$68,960
Vehicles (est.)	\$8,216
Total Levy	\$77,176

III. Rate for FY2021-22 to yield same levy as FY2020-21

\$77,176 ÷ \$405,438,551 x 100	0.01904 (1.904¢)
---------------------------------------	-------------------------

IV. Calculation of average annual increase in tax base due to improvements since last general reappraisal

Period	Prior → Subsequent	Increase	% Increase
2015→2016	\$275,272,000→\$275,692,920	\$420,920	0.15%
2016→2017	\$275,692,920→\$289,232,000	\$13,539,080	4.91%
2017→2018	\$289,232,000→\$300,008,000	\$10,776,000	3.73%
2018→2019	\$300,008,000→\$303,924,000	\$3,916,000	1.31%
2019→2020	\$303,924,000→\$308,364,481	\$4,440,481	1.46%
Average Increase		\$6,618,496	2.31%

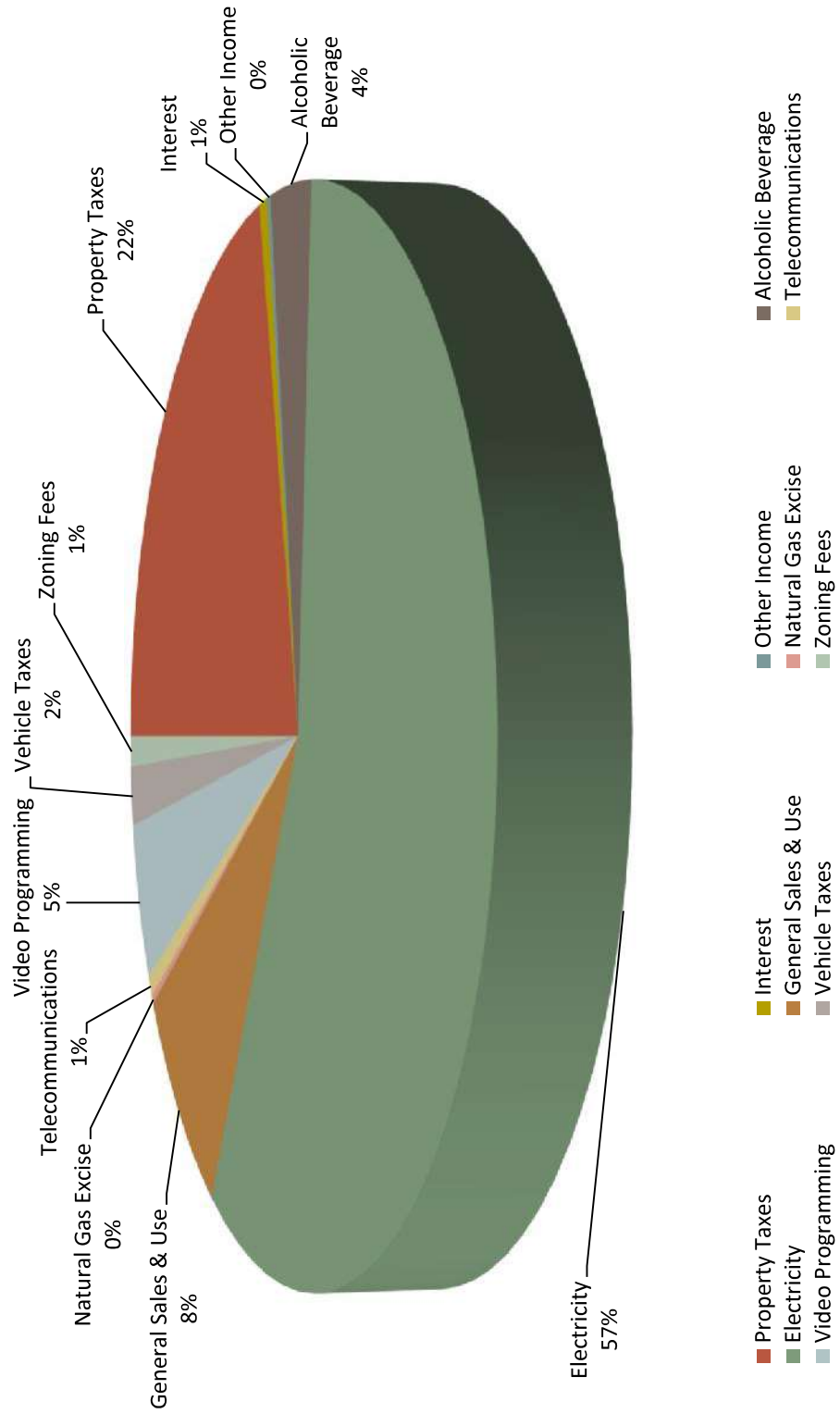
V. Rate increased by calculated growth factor

0.01904 x 1.0231	0.1948 (1.95¢)
-------------------------	-----------------------

The revenue neutral tax rate for FY2021-22 accounting for the 5-year-average growth factor would be **\$0.0195/\$100.**

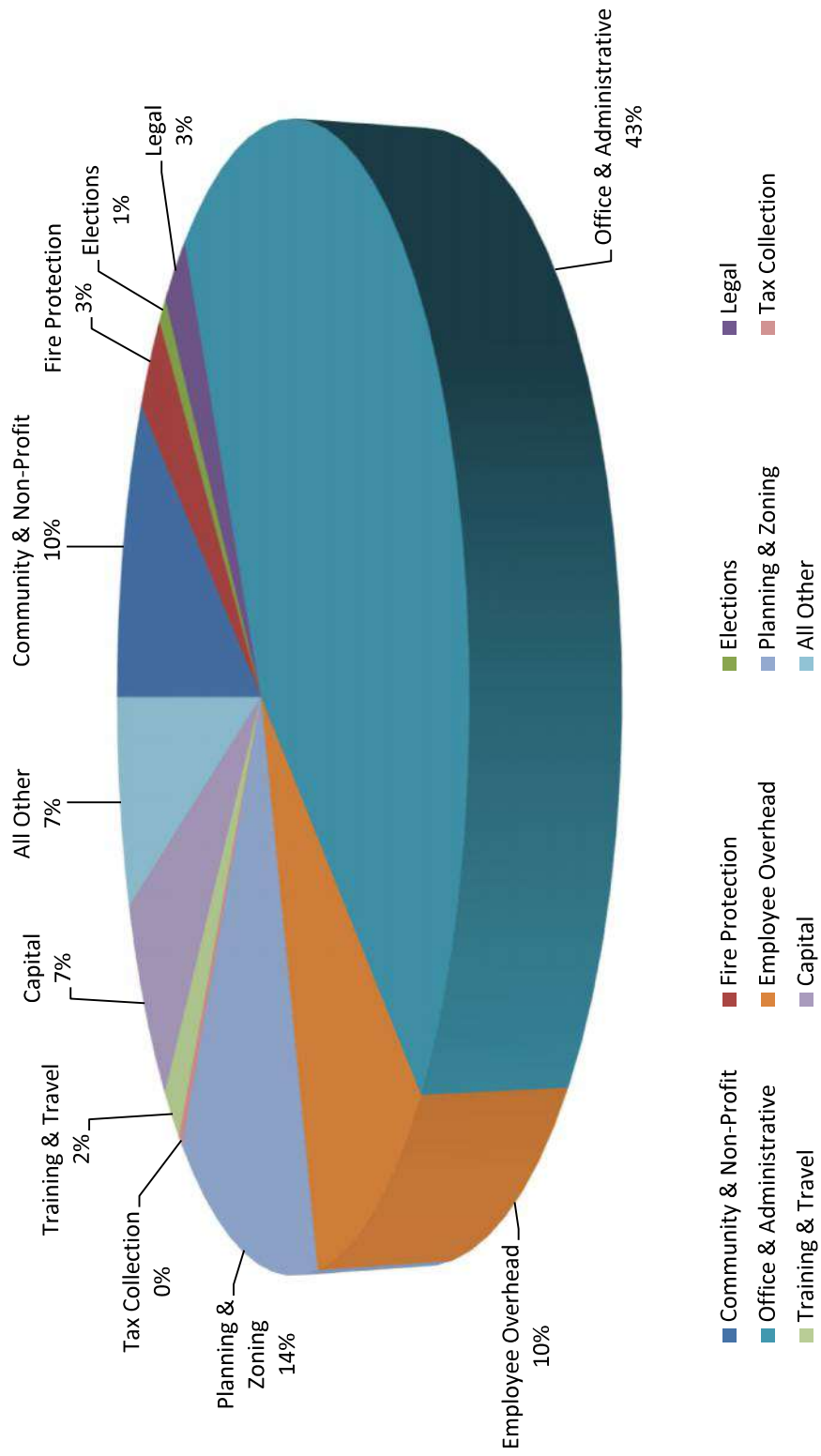
Mineral Springs Proposed Revenues 2021-2022

\$364,215



Mineral Springs Proposed Expenditures 2021-22

\$364,215



PRIOR YEAR (AS ADOPTED)

REVENUES			\$ 351,480
	<i>TOTAL INCOME</i>		<i>\$ 351,480</i>
	Property Taxes	\$ 67,810	
	Current Year	\$ 67,210	
	Prior Years	\$ 600	
	Interest	\$ 5,825	
	Other Income	\$ 3,000	
	Festival	\$ 1,800	
	Miscellaneous	\$ 1,200	
	Sales Tax	\$ 264,410	
	Alcoholic Beverage	\$ 13,015	
	Electricity	\$ 207,000	
	General Sales & Use	\$ 21,400	
	Natural Gas Excise	\$ 1,095	
	Telecommunications	\$ 3,200	
	Video Programming	\$ 18,700	
	Vehicle Taxes	\$ 7,935	
	Zoning Fees	\$ 2,500	

EXPENDITURES			\$ 351,480
	<i>ADMINISTRATIVE & GENERAL GOVERNMENT</i>		<i>\$ 329,075</i>
	Advertising	\$ 1,800	
	Attorney	\$ 9,600	
	Audit	\$ 4,730	
	Charities & Agencies	\$ 10,825	
	Community	\$ 30,800	
	Beautification, Maintenance	\$ 6,300	
	Newsletter	\$ 2,500	
	Special events	\$ 15,000	
	Festival	\$ 10,000	
	AMG	\$ 4,000	
	Misc	\$ 1,000	
	Park & Greenway Maint	\$ 7,000	
	Contingency	\$ 3,000	
	Elections	\$ -	
	Employee Overhead (FICA, work comp, bonds)	\$ 32,500	
	Fire Protection	\$ 12,000	
	Intergovernmental	\$ 15,000	
	Intersection Study	\$ 5,000	
	Construction Match	\$ 10,000	

Office				\$	149,844
Salary: Clerk	\$	38,496			
Salary: Deputy Clerk/Assistant	\$	11,500			
Salary: Finance Officer	\$	35,556			
Salary: Mayor	\$	4,800			
Salary: Council	\$	10,800			
Dues	\$	7,000			
Insurance	\$	4,000			
Records Management	\$	5,092			
Equipment & durable items	\$	2,400			
Supplies	\$	4,000			
Postage (General)	\$	1,000			
Telephone, Internet	\$	7,200			
Reserve/Misc	\$	1,000			
Town Hall Maintenance	\$	12,000			
Supplies	\$	2,000			
Services	\$	10,000			
Utilities	\$	5,000			
Planning				\$	48,276
Zoning Ord. & Planning	\$	5,000			
Zoning Administration	\$	35,276			
Salary	\$	33,276			
Contract	\$	2,000			
Land Use Planning	\$	5,000			
Reserve/Misc	\$	3,000			
Street Lighting				\$	1,600
Tax Collection				\$	1,900
Salary	\$	300			
Contract (Union County)	\$	1,600			
Postage	\$	-			
Billing	\$	-			
Training				\$	3,000
Boards	\$	1,000			
Officials	\$	1,000			
Staff (Clerk, TC, FO)	\$	1,000			
Travel Expenses				\$	4,200
<i>CAPITAL</i>				\$	<i>22,405</i>
Capital Outlay				\$	22,405

PRIOR YEAR

2020 FINAL BUDGET AMOUNTS				ACTUAL (5/21 & 6/21 PROJECTED)		VARIANCE	
REVENUES				\$ 351,480		\$ 358,409.00	\$ 6,929
	Interest		\$ 5,825			\$ 3,863.00	\$ (1,962)
	Property Taxes		\$ 67,810			\$ 69,626.00	\$ 1,816
	Sales Tax		\$ 264,410			\$ 271,927.00	\$ 7,517
	Vehicle Taxes		\$ 7,935			\$ 8,728.00	\$ 793
	Zoning Fees		\$ 2,500			\$ 4,215.00	\$ 1,715
	Other		\$ 3,000			\$ 50.00	\$ (2,950)
EXPENDITURES				\$ 351,480		\$ 288,689.00	\$ (62,791)
<i>ADMINISTRATIVE & GENERAL GOVERNMENT</i>				<i>\$ 329,075</i>		<i>\$ 273,088.00</i>	<i>\$ (55,987)</i>
	Advertising		\$ 1,800			\$ 369.00	\$ (1,431)
	Attorney		\$ 9,600			\$ 3,600.00	\$ (6,000)
	Audit		\$ 4,730			\$ 4,730.00	\$ -
	Charities		\$ 10,825			\$ 10,825.00	\$ -
	Community Projects		\$ 30,800			\$ 15,244.00	\$ (15,556)
	Beaut., Maint.	\$ 6,300		\$ 4,800			
	Special Events	\$ 15,000		\$ 4,500			
	Newsletter	\$ 2,500		\$ 1,400			
	Park & Greenway	\$ 7,000		\$ 4,544			
	Contingency		\$ 3,000			\$ -	\$ (3,000)
	Elections		\$ -			\$ -	\$ -
	Employee overhead		\$ 32,500			\$ 32,400.00	\$ (100)
	Fire Department grant		\$ 12,000			\$ 12,000.00	\$ -
	Intergovernmental		\$ 15,000			\$ 4,000.00	\$ (11,000)
	Office		\$ 149,844			\$ 143,989.00	\$ (5,855)
	Sal.: Clerk	\$ 38,496		\$ 38,496			
	Sal: Deputy	\$ 11,500		\$ 11,078			
	Sal.: Fin. Officer	\$ 35,556		\$ 35,556			
	Sal: Mayor	\$ 4,800		\$ 4,800			
	Sal: Council	\$ 10,800		\$ 10,800			
	Dues	\$ 7,000		\$ 7,081			
	Insurance	\$ 4,000		\$ 3,268			
	Records Management	\$ 5,092		\$ 5,092			
	Equip. & dur.	\$ 2,400		\$ 1,812			
	Supplies	\$ 4,000		\$ 2,354			
	Postage	\$ 1,000		\$ 600			
	Tel., Internet	\$ 7,200		\$ 6,872			
	Reserve	\$ 1,000		\$ 821			
	Town Hall Maint	\$ 12,000		\$ 9,335			
	Supplies	\$ 2,000		\$ 675			
	Services	\$ 10,000		\$ 8,660			
	Utilities	\$ 5,000		\$ 6,024			
	Planning		\$ 48,276			\$ 41,551.00	\$ (6,725)
	Zoning Ord.	\$ 5,000		\$ 3,480			
	Zoning Admin	\$ 35,276		\$ 34,571			
	Salary	\$ 33,276		\$ 33,276			
	Contract	\$ 2,000		\$ 1,295			
	Land Use Plan	\$ 5,000		\$ 2,000			
	Reserve/Misc	\$ 3,000		\$ 1,500			
	Street Lighting		\$ 1,600			\$ 933.00	\$ (667)
	Tax Collection		\$ 1,900			\$ 1,703.00	\$ (197)
	Salary	\$ 300		\$ 300			
	Contract (Union County)	\$ 1,600		\$ 1,403			
	Postage	\$ -		\$ -			
	Billing	\$ -		\$ -			
	Training		\$ 3,000			\$ 876.00	\$ (2,124)
	Officials	\$ 1,000		\$ -			
	Planning Org.	\$ 1,000		\$ -			
	Staff	\$ 1,000		\$ 876			
	Travel Expenses		\$ 4,200			\$ 868.00	\$ (3,332)
CAPITAL				\$ 22,405		\$ 15,601.00	\$ (6,804)
	Capital Outlay		\$ 22,405			\$ 15,601.00	\$ (6,804)
EXCESS (SHORTAGE) OF INCOME OVER EXPENDITURES - Applied to Fund Balance						\$ 69,720.00	

APRIL 2021
TOWN OF MINERAL SPRINGS
PERCENTAGE REPORT

APRIL 30, 2021 REGULAR TAX	2021	2020	2019	2018	2017	2016
BEGINNING CHARGE	161.07	69,621.89	67,917.93	67,335.09	65,402.91	61,553.74
TAX CHARGE						
PUBLIC UTILITIES CHARGES						
DISCOVERIES						
NON-DISCOVERIES						
RELEASES						
TOTAL CHARGE	161.07	69,621.89	67,917.93	67,335.09	65,402.91	61,553.74
BEGINNING COLLECTIONS	54.02	68,933.74	67,674.83	67,255.53	65,331.09	61,487.70
COLLECTIONS - TAX	1.35	244.71	23.42	0.40		
COLLECTIONS - INTEREST		10.64	2.70	1.11		
TOTAL COLLECTIONS	55.37	69,178.45	67,698.25	67,255.93	65,331.09	61,487.70
BALANCE OUTSTANDING	105.70	443.44	219.68	79.16	71.82	66.04
PERCENTAGE OF REGULAR	0.34	0.99	1.00	1.00	1.00	1.00
COLLECTION FEE 1.5 %	0.02	3.83	0.39	0.02	-	-

Mineral Springs Prior Years Property Tax Report

April 2021

April 30, 2021	2011				
BEGINNING CHARGE	\$64,878.42				
PUBLIC UTILITIES	\$1,319.20				
MINIMAL RELEASES	(\$145.21)				
DISCOVERIES	\$61.82				
ABATEMENTS (RELEASES)	(\$301.25)				
TOTAL CHARGE	\$65,812.98				
PREVIOUS COLLECTIONS	\$65,767.98				
PREVIOUS BALANCE DUE	\$19.54				\$19.54
COLLECTIONS - TAX					\$0.00
COLLECTIONS - INTEREST/FEES					\$0.00
GROSS MONTHLY COLLECTIONS					
MISC. ADJUSTMENTS					
TOTAL TAX COLLECTED TO DATE	\$65,767.98				
BALANCE OUTSTANDING	\$17.32				\$17.32
PERCENTAGE COLLECTED	99.93%				

Mineral Springs Unpaid Property Taxes - Real and Personal as of April 30, 2021

Name	Tax Map Number	2011	Total
CAROLINA STREET SUPPLY, SHEPPARD JONATHAN	848391	\$6.88	
COOMBER CUSTOM MASONRY LLC	1812652	\$10.44	
Total		\$17.32	\$17.32

Town of Mineral Springs

FINANCE REPORT

April 2021

Prepared for:

The Mineral Springs Town Council

By:

Frederick Becker III
Finance Officer

June 10, 2021

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Cash Flow Report FY2020 YTD

7/1/2020 through 4/30/2021

5/17/2021

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Category	7/1/2020- 4/30/2021
INCOME	
Interest Income	3,189.14
Other Inc	
Festival 2020	
Vendor	-75.00
TOTAL Festival 2020	-75.00
Zoning	3,515.00
TOTAL Other Inc	3,440.00
Prop Tax 2020	
Receipts 2020	
Int	92.20
Tax	68,933.74
TOTAL Receipts 2020	69,025.94
TOTAL Prop Tax 2020	69,025.94
Prop Tax 2021	
Receipts 2021	
Prepayments	54.02
TOTAL Receipts 2021	54.02
TOTAL Prop Tax 2021	54.02
Prop Tax Prior Years	
Prop Tax 2010	
Receipts 2010	
Int	2.30
Tax	2.22
TOTAL Receipts 2010	4.52
TOTAL Prop Tax 2010	4.52
Prop Tax 2011	
Receipts 2011	
Int	2.10
Tax	2.22
TOTAL Receipts 2011	4.32
TOTAL Prop Tax 2011	4.32
Prop Tax 2014	
Receipts 2014	
Int	0.25
Tax	7.20
TOTAL Receipts 2014	7.45
TOTAL Prop Tax 2014	7.45
Prop Tax 2015	
Receipts 2015	
Int	6.11
Tax	0.00
TOTAL Receipts 2015	6.11
TOTAL Prop Tax 2015	6.11
Prop Tax 2016	
Receipts2016	
Int	5.97
Tax	16.35
TOTAL Receipts2016	22.32
TOTAL Prop Tax 2016	22.32

Cash Flow Report FY2020 YTD

7/1/2020 through 4/30/2021

5/17/2021

Page 2

Category	7/1/2020- 4/30/2021
Prop Tax 2017	
Receipts2017	
Int	4.73
Tax	19.88
TOTAL Receipts2017	24.61
TOTAL Prop Tax 2017	24.61
Prop Tax 2018	
Receipts	
Int	13.24
Tax	57.90
TOTAL Receipts	71.14
TOTAL Prop Tax 2018	71.14
Prop Tax 2019	
Receipts 2019	
Int	23.31
Tax	231.91
TOTAL Receipts 2019	255.22
TOTAL Prop Tax 2019	255.22
TOTAL Prop Tax Prior Years	395.69
Sales Tax	
Cable TV	9,678.84
Electricity	109,289.54
Natural Gas Excise	223.78
Sales & Use Dist	19,497.90
telecommunications	1,770.17
TOTAL Sales Tax	140,460.23
Veh Tax	
Int 2020	46.37
Tax 2020	6,499.87
TOTAL Veh Tax	6,546.24
TOTAL INCOME	223,111.26
EXPENSES	
Ads	119.40
Attorney	3,000.00
Audit	4,730.00
Capital Outlay	
Equipment	2,454.00
Land Acquisition	6,147.00
TOTAL Capital Outlay	8,601.00
Charities & Agencies	2,375.00
Community	
Greenway	1,245.28
Maint	3,725.35
Parks & Rec	
Park	2,013.30
TOTAL Parks & Rec	2,013.30
Special Events	
Services	4,000.00
TOTAL Special Events	4,000.00
TOTAL Community	10,983.93

Cash Flow Report FY2020 YTD

7/1/2020 through 4/30/2021

5/17/2021

Page 3

Category	7/1/2020- 4/30/2021
Emp	
Benefits	
Dental	820.00
Life	520.80
NCLGERS	13,281.90
Vision	140.00
TOTAL Benefits	14,762.70
Bond	550.00
FICA	
Med	1,545.48
Soc Sec	6,606.78
TOTAL FICA	8,152.26
Payroll	1,657.55
Work Comp	2,056.00
TOTAL Emp	27,178.51
Office	
Clerk	32,080.00
Council	9,000.00
Deputy Clerk	9,238.22
Dues	7,081.26
Equip	1,509.40
Finance Officer	29,630.00
Ins	3,267.67
Maint	
Materials	175.35
Service	5,629.40
TOTAL Maint	5,804.75
Mayor	4,000.00
Misc	149.90
Post	537.95
Records	5,092.32
Supplies	2,031.78
Tel	5,844.07
Util	5,172.57
TOTAL Office	120,439.89
Planning	
Administration	
Contract	1,294.92
Salaries	27,730.00
TOTAL Administration	29,024.92
Misc	831.38
Ordinance Changes	1,780.00
TOTAL Planning	31,636.30
Street Lighting	694.38
Tax Coll	
Contract	1,238.26
Sal	250.00
TOTAL Tax Coll	1,488.26
Training	
Staff	275.76
TOTAL Training	275.76

Cash Flow Report FY2020 YTD

7/1/2020 through 4/30/2021

5/17/2021

Page 4

Category	7/1/2020- 4/30/2021
Travel	368.78
TOTAL EXPENSES	211,891.21
TRANSFERS	
FROM Check Min Spgs	110,000.00
FROM MM Sav ParkSterling	100,000.00
TO MM Sav ParkSterling	-110,000.00
TO South State CD	-100,000.00
TOTAL TRANSFERS	0.00
OVERALL TOTAL	11,220.05

Account Balances History Report - As of 4/30/2021

(Includes unrealized gains)

Account	6/29/2020	6/30/2020	7/31/2020	8/31/2020	9/30/2020	10/31/2020	11/30/2020
	Balance	Balance	Balance	Balance	Balance	Balance	Balance
ASSETS							
Cash and Bank Accounts							
Check Min Spgs	84,738.71	84,441.45	51,105.04	35,026.47	31,724.67	20,959.01	8,805.82
MM Sav ParkSterling	619,614.94	619,750.75	619,882.34	620,013.96	570,140.68	570,257.83	570,330.48
NCCMT_Cash	2,357.24	2,357.40	2,357.54	2,357.63	2,357.67	2,357.69	2,357.71
South State CD	206,460.52	206,460.52	206,460.52	207,313.97	307,618.66	307,618.66	307,618.66
TOTAL Cash and Bank Accounts	913,171.41	913,010.12	879,805.44	864,712.03	911,841.68	901,193.19	889,112.67
Other Assets							
State Revenues Receivable	0.00	60,342.45	57,639.53	55,462.21	0.00	0.00	0.00
TOTAL Other Assets	0.00	60,342.45	57,639.53	55,462.21	0.00	0.00	0.00
TOTAL ASSETS	913,171.41	973,352.57	937,444.97	920,174.24	911,841.68	901,193.19	889,112.67
LIABILITIES							
Other Liabilities							
Accounts Payable	692.76	2,247.05	692.76	692.76	692.76	692.76	692.76
TOTAL Other Liabilities	692.76	2,247.05	692.76	692.76	692.76	692.76	692.76
TOTAL LIABILITIES	692.76	2,247.05	692.76	692.76	692.76	692.76	692.76
OVERALL TOTAL	912,478.65	971,105.52	936,752.21	919,481.48	911,148.92	900,500.43	888,419.91

Account Balances History Report - As of 4/30/2021

(Includes unrealized gains)

5/17/2021

Account	12/31/2020 Balance	1/31/2021 Balance	2/28/2021 Balance	3/31/2021 Balance	4/30/2021 Balance
ASSETS					
Cash and Bank Accounts					
Check Min Spgs	32,057.47	33,878.40	24,480.25	62,216.79	41,260.52
MM Sav ParkSterling	630,403.88	630,479.01	630,527.38	630,584.39	630,636.22
NCCMT_Cash	2,357.73	2,357.75	2,357.77	2,357.79	2,357.81
South State CD	308,193.83	308,193.83	308,193.83	308,763.78	308,763.78
TOTAL Cash and Bank Accounts	973,012.91	974,908.99	965,559.23	1,003,922.75	983,018.33
Other Assets					
State Revenues Receivable	0.00	0.00	0.00	0.00	0.00
TOTAL Other Assets	0.00	0.00	0.00	0.00	0.00
TOTAL ASSETS	973,012.91	974,908.99	965,559.23	1,003,922.75	983,018.33
LIABILITIES					
Other Liabilities					
Accounts Payable	692.76	692.76	692.76	692.76	692.76
TOTAL Other Liabilities	692.76	692.76	692.76	692.76	692.76
TOTAL LIABILITIES	692.76	692.76	692.76	692.76	692.76
OVERALL TOTAL	972,320.15	974,216.23	964,866.47	1,003,229.99	982,325.57

Mineral Springs Monthly Revenue Summary 2020-21

TOWN OF MINERAL SPRINGS											
REVENUE SUMMARY 2020-21											
Source	Budget	Receivable	Rec'd YTD	% of Budget	July	August	September	October	November		
Property Tax - prior	\$ 600.00	\$ 204.31	\$ 395.69	65.9%	\$ 4.52	\$ 57.10	\$ 18.47	\$ 39.40	\$ (5.99)		
Property Tax - 2020	\$ 67,210.00	\$ (1,815.94)	\$ 69,025.94	102.7%	\$ -	\$ 333.44	\$ 5,713.94	\$ 3,188.44	\$ 3,676.50		
Fund Balance Approp.	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -	\$ -		
Interest	\$ 5,825.00	\$ 2,635.86	\$ 3,189.14	54.7%	\$ 131.73	\$ 985.16	\$ 431.45	\$ 117.17	\$ 72.67		
Sales Tax - Electric	\$ 207,000.00	\$ 97,710.46	\$ 109,289.54	52.8%	\$ -	\$ -	\$ -	\$ -	\$ -		
Sales Tax - Sales & Use	\$ 21,400.00	\$ 1,902.10	\$ 19,497.90	91.1%	\$ -	\$ -	\$ 2,572.44	\$ 2,406.60	\$ 2,182.40		
Sales Tax - Other Util.	\$ 22,995.00	\$ 11,322.21	\$ 11,672.79	50.8%	\$ -	\$ -	\$ -	\$ -	\$ -		
Sales Tax - Alc. Bev.	\$ 13,015.00	\$ 13,015.00	\$ -	0.0%	\$ -	\$ -	\$ -	\$ -	\$ -		
Vehicle Taxes	\$ 7,935.00	\$ 1,388.76	\$ 6,546.24	82.5%	\$ -	\$ 822.14	\$ -	\$ 1,522.09	\$ 730.49		
Zoning Fees	\$ 2,500.00	\$ (1,015.00)	\$ 3,515.00	140.6%	\$ 100.00	\$ 500.00	\$ 360.00	\$ 100.00	\$ 205.00		
Other	\$ 3,000.00	\$ 3,020.98	\$ (20.98)	-0.7%	\$ -	\$ (75.00)	\$ -	\$ -	\$ -		
Totals	\$ 351,480.00	\$ 128,368.74	\$ 223,111.26	63.5%	\$ 236.25	\$ 2,622.84	\$ 9,096.30	\$ 7,373.70	\$ 6,861.07		
REVENUE SUMMARY 2020-21											
Source	Budget	Receivable	Rec'd YTD	% of Budget	July	August	September	October	November		
Property Tax - prior	\$ 6.19	\$ 99.39	\$ 128.31	\$ 23.98	\$ 24.32						
Property Tax - 2020	\$ 31,196.45	\$ 17,246.74	\$ 5,376.86	\$ 1,831.22	\$ 462.35						
Fund Balance Approp.	\$ -	\$ -	\$ -	\$ -	\$ -						
Interest	\$ 648.59	\$ 75.15	\$ 48.39	\$ 626.98	\$ 51.85						
Sales Tax - Electric	\$ 60,943.13	\$ -	\$ -	\$ 48,346.41	\$ -						
Sales Tax - Sales & Use	\$ 2,420.57	\$ 2,396.90	\$ 2,454.87	\$ 2,733.71	\$ 2,330.41						
Sales Tax - Other Util.	\$ 6,304.41	\$ -	\$ -	\$ 5,368.38	\$ -						
Sales Tax - Alc. Bev.	\$ -	\$ -	\$ -	\$ -	\$ -						
Vehicle Taxes	\$ -	\$ 608.54	\$ 1,224.25	\$ 736.10	\$ 902.63						
Zoning Fees	\$ 75.00	\$ 660.00	\$ 485.00	\$ 405.00	\$ 625.00						
Other	\$ -	\$ -	\$ 22.50	\$ 31.23	\$ 0.29						
Totals	\$ 101,594.34	\$ 21,086.72	\$ 9,740.18	\$ 60,103.01	\$ 4,396.85	\$ -	\$ -	\$ -	\$ 6,861.07		

Mineral Springs Budget Comparison 2020-21

TOWN OF MINERAL SPRINGS										
BUDGET COMPARISON 2020-2021										
Appropriation dept	Budget	Unspent	Spent YTD	% of Budget	July	August	September	October	November	
Advertising	\$ 1,800.00	\$ 1,680.60	\$ 119.40	6.6%	\$ -	\$ -	\$ -	\$ -	\$ -	
Attorney	\$ 9,600.00	\$ 6,600.00	\$ 3,000.00	31.3%	\$ 300.00	\$ -	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00
Audit	\$ 4,730.00	\$ -	\$ 4,730.00	100.0%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,311.00
Charities & Agencies	\$ 10,825.00	\$ 8,450.00	\$ 2,375.00	21.9%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Community Projects	\$ 30,800.00	\$ 19,816.07	\$ 10,983.93	35.7%	\$ 13.56	\$ 4,361.49	\$ 417.66	\$ 888.07	\$ 212.65	\$ 212.65
Contingency	\$ 3,000.00	\$ 3,000.00	\$ -	0.0%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Employee Overhead	\$ 32,500.00	\$ 5,321.49	\$ 27,178.51	83.6%	\$ 5,046.45	\$ 2,573.95	\$ 2,451.51	\$ 2,448.85	\$ 2,441.03	\$ 2,441.03
Elections	\$ -	\$ -	\$ -	0.0%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Fire Protection	\$ 12,000.00	\$ 12,000.00	\$ -	0.0%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Intergovernmental	\$ 15,000.00	\$ 15,000.00	\$ -	0.0%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Office & Administrative	\$ 149,844.00	\$ 29,404.11	\$ 120,439.89	80.4%	\$ 24,631.68	\$ 9,990.84	\$ 10,875.37	\$ 11,156.92	\$ 9,722.33	\$ 9,722.33
Planning & Zoning	\$ 48,276.00	\$ 16,639.70	\$ 31,636.30	65.5%	\$ 4,497.87	\$ 2,912.46	\$ 3,055.95	\$ 3,032.02	\$ 2,773.00	\$ 2,773.00
Street Lighting	\$ 1,600.00	\$ 905.62	\$ 694.38	43.4%	\$ -	\$ -	\$ 217.38	\$ 79.50	\$ 79.50	\$ 79.50
Tax Collection	\$ 1,900.00	\$ 411.74	\$ 1,488.26	78.3%	\$ 25.00	\$ 54.83	\$ 110.99	\$ 116.83	\$ 102.08	\$ 102.08
Training	\$ 3,000.00	\$ 2,724.24	\$ 275.76	9.2%	\$ 75.00	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 4,200.00	\$ 3,831.22	\$ 368.78	8.8%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Capital Outlay	\$ 22,405.00	\$ 13,804.00	\$ 8,601.00	38.4%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Totals	\$ 351,480.00	\$ 139,588.79	\$ 211,891.21	60.3%	\$ 34,589.56	\$ 19,893.57	\$ 17,428.86	\$ 18,022.19	\$ 18,941.59	\$ 18,941.59
Off Budget:										
Tax Refunds					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interfund Transfers					\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Off Budget:			\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Mineral Springs Budget Comparison 2020-21

Appropriation dept	December	January	February	March	April	May	June	June a/p
Advertising	\$ 69.65	\$ -	\$ -	\$ -	\$ 49.75			
Attorney	\$ 300.00	\$ 300.00	\$ 600.00	\$ 300.00	\$ 300.00			
Audit	\$ -	\$ -	\$ -	\$ 1,419.00	\$ -			
Charities & Agencies	\$ -	\$ -	\$ -	\$ 2,375.00	\$ -			
Community Projects	\$ 1,732.90	\$ 1,834.90	\$ 212.65	\$ 420.45	\$ 889.60			
Contingency	\$ -	\$ -	\$ -	\$ -	\$ -			
Employee Overhead	\$ 2,434.99	\$ 2,600.39	\$ 2,429.28	\$ 2,453.98	\$ 2,298.08			
Elections	\$ -	\$ -	\$ -	\$ -	\$ -			
Fire Protection	\$ -	\$ -	\$ -	\$ -	\$ -			
Intergovernmental	\$ -	\$ -	\$ -	\$ -	\$ -			
Office & Administrative	\$ 9,637.74	\$ 11,177.25	\$ 10,396.92	\$ 11,567.45	\$ 11,283.39			
Planning & Zoning	\$ 2,773.00	\$ 2,773.00	\$ 2,773.00	\$ 2,773.00	\$ 4,273.00			
Street Lighting	\$ 79.50	\$ -	\$ 79.50	\$ 159.00	\$ -			
Tax Collection	\$ 493.04	\$ 304.34	\$ 144.59	\$ 76.11	\$ 60.45			
Training	\$ -	\$ 200.76	\$ -	\$ -	\$ -			
Travel	\$ 173.28	\$ -	\$ -	\$ 195.50	\$ -			
Capital Outlay	\$ -	\$ -	\$ 2,454.00	\$ -	\$ 6,147.00			
Totals	\$ 17,694.10	\$ 19,190.64	\$ 19,089.94	\$ 21,739.49	\$ 25,301.27	\$ -	\$ -	\$ -
Off Budget:								
Tax Refunds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interfund Transfers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Off Budget:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

April Cash Flow Report - Apr 2021

4/1/2021 through 4/30/2021

5/17/2021

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Category	4/1/2021- 4/30/2021
INCOME	
Interest Income	51.85
Other Inc	
Zoning	625.00
TOTAL Other Inc	625.00
Prop Tax 2020	
Receipts 2020	
Int	12.88
Tax	449.47
TOTAL Receipts 2020	462.35
TOTAL Prop Tax 2020	462.35
Prop Tax 2021	
Receipts 2021	
Prepayments	0.29
TOTAL Receipts 2021	0.29
TOTAL Prop Tax 2021	0.29
Prop Tax Prior Years	
Prop Tax 2015	
Receipts 2015	
Int	1.75
Tax	0.00
TOTAL Receipts 2015	1.75
TOTAL Prop Tax 2015	1.75
Prop Tax 2018	
Receipts	
Int	0.17
Tax	0.84
TOTAL Receipts	1.01
TOTAL Prop Tax 2018	1.01
Prop Tax 2019	
Receipts 2019	
Int	3.64
Tax	17.92
TOTAL Receipts 2019	21.56
TOTAL Prop Tax 2019	21.56
TOTAL Prop Tax Prior Years	24.32
Sales Tax	
Sales & Use Dist	2,330.41
TOTAL Sales Tax	2,330.41
Veh Tax	
Int 2020	11.20
Tax 2020	891.43
TOTAL Veh Tax	902.63
TOTAL INCOME	4,396.85
EXPENSES	
Ads	49.75
Attorney	300.00
Capital Outlay	
Land Acquisition	6,147.00

April Cash Flow Report - Apr 2021

4/1/2021 through 4/30/2021

5/17/2021

Page 2

Category	4/1/2021- 4/30/2021
TOTAL Capital Outlay	6,147.00
Community	
Maint	675.00
Parks & Rec	
Park	214.60
TOTAL Parks & Rec	214.60
TOTAL Community	889.60
Emp	
Benefits	
NCLGERS	1,328.19
TOTAL Benefits	1,328.19
FICA	
Med	153.63
Soc Sec	656.76
TOTAL FICA	810.39
Payroll	159.50
TOTAL Emp	2,298.08
Office	
Clerk	3,208.00
Council	900.00
Deputy Clerk	860.60
Dues	1,091.00
Equip	83.77
Finance Officer	2,963.00
Maint	
Service	188.00
TOTAL Maint	188.00
Mayor	400.00
Misc	149.90
Post	27.75
Supplies	592.08
Tel	335.18
Util	484.11
TOTAL Office	11,283.39
Planning	
Administration	
Salaries	2,773.00
TOTAL Administration	2,773.00
Ordinance Changes	1,500.00
TOTAL Planning	4,273.00
Tax Coll	
Contract	35.45
Sal	25.00
TOTAL Tax Coll	60.45
TOTAL EXPENSES	25,301.27
OVERALL TOTAL	-20,904.42

Register Report - Apr 2021

4/1/2021 through 4/30/2021

5/17/2021

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Date	Num	Description	Memo	Category	Clr	Amount
4/1/2021	6077	Verizon Wireless	221474588-00001 (... Office:Tel		R	-69.14
4/1/2021	6078	City Of Charlotte {C...	I/N MD-21000890 C... Office:Dues		R	-1,091.00
4/1/2021	6079	Quadient, Inc.	I/N 58328740 Posta... Office:Equip		R	-83.77
4/2/2021	EFT	Debit Card (Zoom)	I/N INV77702367 Vir... Office:Misc		R	-149.90
4/6/2021	EFT	Debit Card (Bluedog...	Plotter Print Head (F... Office:Supplies		R	-379.99
4/6/2021	6080	R.C.S., Inc.	I/N 122434 Park Re... Community:Parks & Rec:Park		R	-200.00
4/6/2021	6081	Clark, Griffin & McC...	I/N 7582 4/2021 (FY... Attorney		R	-300.00
4/6/2021	6082	Bucket, Mop, And Br...	I/N CTBCom-1443 j... Office:Maint:Service			-188.00
4/6/2021	EFT	Debit Card (NotaryS...	Vicky Notary Stamp... Office:Supplies		R	-64.82
4/9/2021	6083	Benchmark Planning	I/N 1930 Ordinance ... Planning:Ordinance Changes		R	-1,500.00
4/9/2021	6084	First National Bank	Cashier's Check to ... Capital Outlay:Land Acquisition		R	-6,147.00
4/12/2021	EFT...	Union County	FY2020	Prop Tax 2021:Receipts 2021:Prepaym...	R	0.29
			FY2020	Prop Tax 2020:Receipts 2020:Tax	R	449.47
			FY2020	Prop Tax 2020:Receipts 2020:Int	R	12.88
			FY2020	Prop Tax Prior Years:Prop Tax 2019:R...	R	17.92
			FY2020	Prop Tax Prior Years:Prop Tax 2019:R...	R	3.64
			FY2020	Prop Tax Prior Years:Prop Tax 2018:R...	R	0.84
			FY2020	Prop Tax Prior Years:Prop Tax 2018:R...	R	0.17
			FY2020	Prop Tax Prior Years:Prop Tax 2015:R...	R	0.00
			FY2020	Prop Tax Prior Years:Prop Tax 2015:R...	R	1.75
			FY2020	Tax Coll:Contract	R	-7.31
4/12/2021	EFT	Debit Card (AOL)	AOL Troubleshootin... Office:Tel		R	-7.99
4/13/2021	EFT	Debit Card (USPS)	Postage - zoning vio... Office:Post		R	-22.85
4/15/2021	EFT	NC Department of R...	Sales & Use Distribu... Sales Tax:Sales & Use Dist		R	2,330.41
4/16/2021	EFT	Debit Card (USPS)	Postage - zoning vio... Office:Post		R	-4.90
4/22/2021	EFT	Point And Pay	06057042 (FY2020)` Other Inc:Zoning		R	25.00
4/26/2021	DEP	Deposit #20016	#20016 Zoning (FY2... Other Inc:Zoning		R	500.00
4/26/2021	6085	Windstream	061348611 (FY2020) Office:Tel			-258.05
4/26/2021	6086	Duke Power	9100 3284 5041 (OI... Office:Util		R	-25.19
4/26/2021	6087	Duke Power	9100 3284 4818 (FY... Office:Util		R	-124.92
4/26/2021	6088	The Enquirer-Journa...	00013909 Public He... Ads			-49.75
4/26/2021	6089	Union County Public...	84361*00 (FY2020) Office:Util		R	-38.21
4/26/2021	6090	Union County Public...	91052*00 (FY2020) Community:Parks & Rec:Park		R	-14.60
4/26/2021	6091	Ken Newell	Welcome Signs 1/2... Community:Maint			-675.00
4/26/2021	6092	Amerigas	84.1 gal @ \$3.089 (... Office:Util			-295.79
4/26/2021	6093	Xerox Corporation	I/N 012973013 (FY2... Office:Supplies			-147.27
4/26/2021	EFT...	Union County {NCV...	NCVTS 2103 (FY20... Veh Tax:Tax 2020		R	902.56
			NCVTS Refunds (F... Veh Tax:Tax 2020		R	-11.13
			NCVTS 2103 (FY20... Veh Tax:Int 2020		R	11.20
			FY2020	Tax Coll:Contract	R	-28.14
4/27/2021	EFT...	NC State Treasurer	04/21 LGERS contri... Office:Clerk		R	-192.48
			04/21 LGERS contri... Office:Finance Officer		R	-177.78
			04/21 LGERS contri... Planning:Administration:Salaries		R	-166.38
			04/21 employer cont... Emp:Benefits:NCLGERS		R	-1,328.19
4/27/2021	EFT	Point And Pay	06057042 (FY2020)` Other Inc:Zoning		R	25.00
4/27/2021	EFT	Point And Pay	06057073 (FY2020)` Other Inc:Zoning		R	50.00
4/27/2021	EFT	Point And Pay	06060007D (FY2020)` Other Inc:Zoning		R	25.00
4/29/2021	EFT...	Paychex	Salary 04/21 (FY202... Office:Clerk		R	-3,015.52
			Supplement 04/21 (... Office:Clerk		R	0.00
			04/21 (FY2020) Office:Deputy Clerk		R	-860.60
			Salary 04/21 (FY202... Office:Finance Officer		R	-2,785.22

Register Report - Apr 2021

4/1/2021 through 4/30/2021

5/17/2021

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Date	Num	Description	Memo	Category	Clr	Amount
			Salary 04/21 (FY202... Office:Mayor		R	-400.00
			Salary 04/21 (FY202... Office:Council		R	-900.00
			Salary 04/21 (FY202... Planning:Administration:Salaries		R	-2,606.62
			Salary 04/21 (FY202... Tax Coll:Sal		R	-25.00
			FY2020 Emp:FICA:Soc Sec		R	-656.76
			FY2020 Emp:FICA:Med		R	-153.63
4/30/2021	EFT	Paychex Fees	Fees 04/21 (FY2020) Emp:Payroll		R	-159.50
4/1/2021 - 4/30/2021						-20,956.27

TOTAL INFLOWS	4,356.13
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TOTAL OUTFLO...	-25,312.40
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NET TOTAL	-20,956.27
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April 2021

Revenue Details

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NC Sales & Use Distribution

February 2021 Collections

Summary

MUNICIPALITY	ARTICLE 39	ARTICLE 40	ARTICLE 42	ARTICLE 43	ARTICLE 44	ART 44 *524	ARTICLE 45	ARTICLE 46	CITY HH	TOTAL
UNION	2,086,182.37	1,377,239.94	1,112,150.93	-	38.95	309,221.75	-	-	(327,162.08)	4,557,671.86
(AD VALOREM)	917.55	605.74	489.15	-	0.02	136.00	-	-	606.66	2,755.12
HEMBY BRIDGE	-	-	-	-	-	-	-	-	-	-
INDIAN TRAIL	77,313.73	51,040.39	41,216.21	-	1.44	11,459.73	-	-	51,116.71	232,148.21
LAKE PARK	7,036.87	4,645.55	3,751.38	-	0.13	1,043.03	-	-	4,652.49	21,129.45
MARSHVILLE	10,444.07	6,894.89	5,567.77	-	0.20	1,548.06	-	-	6,905.19	31,360.18
MARVIN	6,315.22	4,169.14	3,366.67	-	0.12	936.07	-	-	4,175.37	18,962.59
MINERAL SPRINGS	776.11	512.37	413.75	-	0.01	115.04	-	-	513.13	2,330.41
MINT HILL *	43.88	28.97	23.39	-	-	6.50	-	-	29.01	131.75
MONROE	245,872.74	162,318.38	131,075.59	-	4.59	36,444.17	-	-	162,561.09	738,276.56
STALLINGS *	41,026.24	27,084.39	21,871.23	-	0.77	6,081.06	-	-	27,124.89	123,188.58
UNIONVILLE	1,248.95	824.52	665.82	-	0.02	185.12	-	-	825.75	3,750.18
WAXHAW	82,460.79	54,438.33	43,960.13	-	1.54	12,222.65	-	-	54,519.73	247,603.17
WEDDINGTON *	12,827.64	8,468.45	6,838.46	-	0.24	1,901.36	-	-	8,481.10	38,517.25
WESLEY CHAPEL	1,835.62	1,211.82	978.57	-	0.03	272.08	-	-	1,213.64	5,511.76
WINGATE	6,711.41	4,430.69	3,577.87	-	0.13	994.79	-	-	4,437.32	20,152.21
TOTAL	2,581,013.19	1,703,913.57	1,375,946.92	-	48.19	382,567.41	-	-	-	6,043,489.28

Jurisdiction Collection by Year
Union County
Date Distributed: 3/1/2021 to 3/31/2021

990 - TOWN OF MINERAL SPRINGS

Year	Taxes, Assessments and Misc. Charges	Late List	Interest	Total Collected	Commission	Net of Commission
2015	0.00	0.00	1.75	1.75	0.03	1.72
2018	0.84	0.00	0.17	1.01	0.02	0.99
2019	17.90	0.02	3.64	21.56	0.32	21.24
2020	448.96	0.51	12.88	462.35	6.94	455.41
2021	0.29	0.00	0.00	0.29	0.00	0.29
Total:	467.99	0.53	18.44	486.96	7.31	479.65
Grand Total:	467.99	0.53	18.44	486.96	7.31	479.65

Invoice Date	Invoice Number	Description	Invoice Amount
04/06/2021	2109 TAXES	TAX/FEE/INT MARCH 2021	\$479.65

Vendor No.	Vendor Name	Check No.	Check Date	Check Amount
10870	TOWN OF MINERAL SPRINGS	00069807	04/12/2021	479.65



County of Union
 500 North Main Street
 Monroe, North Carolina 28112

Vendor Number Check Date Check Number
 10870 04/12/2021 00069807

"This disbursement has been approved as required by the Local Government Budget and Fiscal Control Act."

\$479.65

Pay Four Hundred Seventy Nine Dollars and 65 cents *****

To The TOWN OF MINERAL SPRINGS
 Order Of PO BOX 600
 MINERAL SPRINGS NC 28108

**EFT COPY
 NON-NEGOTIABLE**

AP



County of Union
 500 North Main Street
 Monroe, North Carolina 28112

10870
 00069807

ADDRESS SERVICE REQUESTED

TOWN OF MINERAL SPRINGS
 PO BOX 600
 MINERAL SPRINGS NC 28108

NCVT'S A/P Receipt Distribution
For the month Ending: 03/31/2021

NCVT15

Jurisdiction	Entity	Vendor #	Inv #	Tax & Fee Amt	Int Only Amt	Cmn Cst	Pending Refunds	Net Amt	Status/Check#
001	Union County	0		\$ 640,497.96	\$ 6,488.86	\$ (19,009.05)	(\$2,463.45)	\$ 625,514.32	No Check
003	Voter Approved Debt Tax	0		97,735.63	982.85	(2,900.95)	(\$375.78)	\$ 95,441.75	No Check
011	Countywide Fire Tax	0		45,990.72	448.22	(1,364.74)	(\$170.67)	\$ 44,903.53	No Check
012	Countywide EMS Tax	0		62,410.87	645.90	(1,852.79)	(\$246.08)	\$ 60,957.90	No Check
013	Griffith Rd	0		796.90	4.61	(22.22)	\$0.00	\$ 779.29	No Check
014	Stack Rd	0		1,508.61	15.51	(39.93)	\$0.00	\$ 1,484.19	No Check
015	Springs Fire Tax	0		7,564.21	88.87	(225.01)	(\$20.90)	\$ 7,407.17	No Check
016	Fairview	0		3,227.63	22.99	(98.86)	(\$3.50)	\$ 3,148.26	No Check
017	New Salem	0		4,236.25	35.64	(118.99)	(\$50.20)	\$ 4,102.70	No Check
018	Beaver Lane	0		4,431.35	36.61	(112.74)	(\$22.80)	\$ 4,332.42	No Check
019	Bakers	0		9,786.33	79.11	(281.27)	(\$25.96)	\$ 9,558.21	No Check
020	Stallings Fire Tax	0		13,814.33	128.25	(423.23)	(\$32.56)	\$ 13,486.79	No Check
021	Unionville	0		5,212.67	35.69	(145.52)	(\$5.75)	\$ 5,097.09	No Check
022	Wingate	0		4,439.20	33.00	(111.07)	\$14.46	\$ 4,375.59	No Check
023	Hemby Bridge Fire Tax	0		18,285.20	182.56	(552.50)	(\$15.65)	\$ 17,899.61	No Check
024	Allens Crossroads	0		879.81	11.96	(21.37)	\$0.00	\$ 868.40	No Check
025	Jackson	0		1,525.63	11.06	(45.63)	(\$5.42)	\$ 1,485.64	No Check
026	Wesley Chapel Fire Tax	0		20,264.82	185.62	(652.04)	(\$77.54)	\$ 19,720.86	No Check
027	Lanes Creek	0		2,248.89	14.01	(59.39)	(\$16.17)	\$ 2,187.34	No Check
028	Waxhaw Fire Tax	0		14,715.12	162.34	(467.74)	(\$74.71)	\$ 14,335.01	No Check
029	Sandy Ridge	0		2,466.13	21.11	(64.62)	\$53.43	\$ 2,476.05	No Check
030	Providence	0		104.71	0.39	(3.72)	\$0.00	\$ 101.38	No Check
101	Village of Marvin	1832	VTFNAP2101-1	6,482.73	59.47	(216.38)	(\$29.17)	\$ 6,296.65	
200	City of Monroe	103-7	VTFNAP2101-1	306,900.78	2,363.75	(7,840.60)	(\$3,596.35)	\$ 297,827.58	
222	Monroe Downtown Service	103-7	VTFNAP2101-2	191.75	3.78	(4.38)	-	\$ 191.15	
300	Town of Wingate	4064	VTFNAP2101-1	15,304.12	129.16	(379.23)	\$0.00	\$ 15,054.05	
400	Town of Marshville	5861	VTFNAP2101-1	11,667.28	199.93	(275.61)	(\$87.97)	\$ 11,503.63	
500	Town of Waxhaw	8268	VTFNAP2101-1	121,669.72	1,012.89	(3,884.42)	(\$470.02)	\$ 118,328.17	
600	Town of Indian Trail	2924	VTFNAP2101-1	93,970.25	858.33	(2,799.94)	(\$207.87)	\$ 91,820.77	
700	Town of Stallings	4860-2	VTFNAP2101-1	41,531.45	425.12	(1,283.86)	(\$61.13)	\$ 40,611.58	
800	Town of Weddington	7518	VTFNAP2101-1	10,429.47	90.26	(331.72)	\$1.15	\$ 10,189.16	
900	Village of Lake Park	1833	VTFNAP2101-1	8,467.92	86.18	(269.38)	(\$35.75)	\$ 8,248.97	
930	Town of Fairview	19458	VTFNAP2101-1	1,100.39	9.25	(31.93)	(\$0.10)	\$ 1,075.61	
970	Village of Wesley Chapel	9262	VTFNAP2101-1	2,013.11	18.21	(64.83)	(\$3.56)	\$ 1,962.93	
980	Town of Unionville	11530	VTFNAP2101-1	1,712.89	17.69	(48.58)	(\$6.35)	\$ 1,675.65	
990	Town of Mineral Springs	10870	VTFNAP2101-1	902.56	11.20	(28.14)	(\$11.13)	\$ 874.49	
999	Schools	0		1,318,216.56	13,310.52	(39,125.26)	(\$5,068.34)	\$ 1,287,333.48	No Check
Total				\$ 2,902,703.95	\$ 28,230.90	\$ (85,161.64)	(\$13,115.84)	\$ 2,882,657.37	
								\$ 605,660.39	AP Total

Invoice Date	Invoice Number	Description	Invoice Amount
03/31/2021	VTFNAP2103-1	CASH RECEIVED MAR 2021 & REFUN	\$874.49

Vendor No.	Vendor Name	Check No.	Check Date	Check Amount
10870	TOWN OF MINERAL SPRINGS	00069967	04/26/2021	874.49



County of Union
 500 North Main Street
 Monroe, North Carolina 28112

Vendor Number Check Date Check Number
 10870 04/26/2021 00069967

"This disbursement has been approved as required by the Local Government Budget and Fiscal Control Act."

\$874.49

Pay Eight Hundred Seventy Four Dollars and 49 cents *****

To The TOWN OF MINERAL SPRINGS
 Order Of PO BOX 600
 MINERAL SPRINGS NC 28108

**EFT COPY
 NON-NEGOTIABLE**

AP



County of Union
 500 North Main Street
 Monroe, North Carolina 28112

10870
 00069967

ADDRESS SERVICE REQUESTED

TOWN OF MINERAL SPRINGS
 PO BOX 600
 MINERAL SPRINGS NC 28108

*Town of Mineral Springs
Resolution in Memory and Honor of
Councilwoman Peggy Neill
R-2021-05*

WHEREAS, the Mineral Springs Town Council, for itself and on behalf of the citizens of the Town of Mineral Springs, expresses its profound sense of loss at the passing of Councilwoman Peggy Neill; and

WHEREAS, we recognize Peggy for her life of compassion, generosity and dedication to our community, and, most particularly, her service to the Town;

WHEREAS, Peggy began her service to the Town of Mineral Springs even before its re-incorporation, having dedicated hundreds of hours of her time as part of the citizens' re-incorporation committee, and as such she should be recognized as a founder of the Town; and

WHEREAS, the Town Council of the Town of Mineral Springs is deeply grieved at the loss of its friend and public servant, but is grateful for the opportunity of having known and worked with Peggy;

NOW, THEREFORE, be it resolved by the Town Council of the Town of Mineral Springs, North Carolina, that we express to the family of Peggy Neill our deepest and most heart-felt condolences and that, as a token of respect and esteem, this Resolution shall be incorporated into the permanent records of this Council.

ADOPTED this 10th day of June, 2021.

Frederick Becker III, Mayor

Valerie Coffey, Mayor Pro Tem

Jerry Countryman, Councilman

Janet Critz, Councilwoman

Lundeen Cureton, Councilwoman

Bettylyn Krafft, Councilwoman

Attest:

Vicky Brooks, CMC, NCCMC, CZO, Town Clerk

MEMO

To: Mineral Springs Town Council
From: Rick Becker
Date: June 3, 2021
Subject: Agreement with Copper Run HOA for Right-of-Way Maintenance

The town of Mineral Springs owns several parcels of land that have road frontage within the Copper Run subdivision. While True Homes was building, the rights-of-way were occasionally mowed and maintained; now that the neighborhood is built out, NCDOT has taken over the roads, and the HOA is controlled by its resident board, the HOA's landscaper has been mowing the right of way in front of all of our properties while doing the rest of the HOA's common area maintenance.

Although our properties are not officially part of the HOA membership and they are not governed by the covenants nor subject to dues, I believe that the town has some responsibility as a good neighbor to keep our road frontage maintained and mowed to match that of the rest of the neighborhood. I have had informal discussions with some of the HOA officers, and we decided to submit a maintenance proposal to Council.

The town is not obligated to participate. The only other similar situation is in Harrington Hall, where the town owns one lot at the end of Wolf Creek Circle. It has less road frontage than we have in Copper Run – 100-150 linear feet or so – and the Harrington Hall lot abuts our parking lot property. We currently have our landscaper Taylor and Sons mow the front of the Harrington Hall lot at the same time he mows the parking lot areas. We pay him \$125 per visit (which includes the parking lot work) – on-demand – and he makes 5 – 6 visits per season.

We have 1,850 linear feet of frontage in Copper Run, and I believe that it would be much more expensive for us to pay Taylor and Sons to maintain that property. Therefore, I am proposing the attached agreement, whereby we would reimburse the Copper Run HOA \$600 per year as a contribution toward the cost of maintaining the right of way in front of our properties.

AGREEMENT

This agreement is made and entered into this 10th day of June, 2021, by and between the Town of Mineral Springs, a North Carolina Municipal Corporation in Union County, North Carolina (“Town”), and the Copper Run Homeowners’ Association, Inc., a North Carolina nonprofit corporation (“HOA”);

Whereas, the Town of Mineral springs is the owner of several parcels lying within the Copper Run subdivision with approximately 1,850 linear feet of road frontage as follows:

- 255 linear feet (lf) on the northeast side of Saddleridge Drive between 2105 Saddleridge Dr. and 2113 Saddleridge Dr.;
- 130 lf on the northeast side of Saddleridge Drive between 2201 saddleridge Dr. and 1401 Huntcliff Dr.;
- 115 lf on the west side of Huntcliff Drive between 1401 Huntcliff Dr. and 1409 Huntcliff Dr.;
- 1,350 lf on the southern side of Crofton drive between 1068 Crofton Dr. and 1218 Crofton Dr.; and

Whereas, all of the above-named streets are maintained by the North Carolina Department of Transportation (NCDOT) including the right-of-way which extends approximately 12 feet beyond the back of the curb; and

Whereas, NCDOT right-of-way mowing and other maintenance is infrequent and would potentially leave the vegetation in an unkempt condition; and

Whereas, most property owners in Copper Run mow and maintain their yards to the NCDOT curb, including the right of way; and

Whereas, it is the intent of the HOA to maintain uniform and manicured rights of way in front of all properties in Copper Run; and

Whereas, it is the intent of the Town as a property owner to be a “good neighbor” and assist in keeping the NCDOT rights of way in front of its properties in well-maintained condition; and

Whereas, the HOA has engaged the services of a professional landscaping firm to maintain common areas and rights of way in front of its common areas; and

Whereas, the HOA’s landscaper has been mowing and maintaining the 1,850 lf of right of way in front of the Town’s properties for the past several years; and

Whereas, the Town has determined that it shares some responsibility for the mowing and maintenance of the rights of way in front of its properties; and

Whereas, it would be most cost-effective for the Town to work cooperatively with the HOA and agree to have the HOA continue to maintain those rights of way while reimbursing the HOA for a portion of the cost rather than engaging its own landscaper to do the work.

Now, therefore, the Town and the HOA hereby agree that:

- The HOA shall continue mowing and maintaining the NCDOT rights of way in front of the town-owned properties described on Page 1 of this agreement;
- The Town shall pay the HOA the sum of Six Hundred Dollars (\$600.00) annually as partial reimbursement for the cost of the right-of-way maintenance;
- This agreement shall run for an initial twelve-month term from July 1, 2021 through June 30, 2022;
- This agreement shall “auto-renew” for successive twelve-month terms unless terminated by either party;
- Either party may terminate the agreement by providing written notice of its intent not to renew the agreement any time in the last 60 days of the term, that is, during the months of May or June;
- The HOA shall invoice the Town in the amount of \$600.00 after July 1st in each year of this agreement at the following address: PO Box 600, Mineral Springs, NC 28108, and the Town shall remit payment within 30 days to the address provided by the HOA on the invoice;
- Nothing in this agreement applies to any property lying outside of the NCDOT right of way, and the HOA shall take care not to mow or otherwise disturb property owned by the Town outside the NCDOT right of way except for any property covered by a separate licensing agreement between the Town and the HOA, the use of which shall be governed by such license or licenses.

X _____ Date _____

Frederick Becker III, Mayor
For the Town of Mineral Springs

X _____ Date _____

For the Copper Run Homeowners' Association

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

Finance Officer

Date

LANDSCAPE MAINTENANCE AGREEMENT – TOWN HALL

This Landscape Maintenance Agreement is entered this the 1st day of July, 2021 by and between TOWN OF MINERAL SPRINGS, a municipal corporation organized and existing under the laws of the State of North Carolina (the “Town”) and RICKY D TAYLOR D/B/A TAYLOR & SON LANDSCAPING & MOWING, a citizen and resident of the County of Union State of North Carolina (the “Contractor”) (collectively, the “Parties”).

WITNESSETH:

WHEREAS, the Town desires to contract with the Contractor for the provision of certain landscaping and maintenance services on the Town’s property, as more particularly described in Exhibit A, (the “Services”), which is incorporated by reference as if fully set forth herein;

WHEREAS, the Contractor wishes to contract with the Town to provide the Services;
and

WHEREAS, the Town and the Contractor desire to reach an agreement for the Contractor to provide the Services subject to the terms and conditions of this Agreement.

NOW, THEREFORE, for and in consideration of the mutual promises and covenants contained in this Agreement, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

1. Term. The term of the Agreement shall be for a period of one (1) year, beginning July 1, 2021 and ending June 30, 2022 (the “Term”). This Agreement shall not automatically renew under any circumstances.

2. Scope of Services. During the Term, Contractor shall care for and maintain the Town Hall and the immediately surrounding area. All Services rendered shall be completed with the highest standard of care and workmanship prevailing in the field of landscape maintenance in the general geographic area in which the Town is located. The Contractor agrees to perform the Services set forth on “Exhibit A” as attached.

3. Termination. This Agreement may be terminated, by either party, upon thirty (30) days prior written notice.

4. Independent Contractor. The parties agree that the Contractor’s relationship to the Town is that of an independent contractor and that nothing contained in this Agreement shall be construed as creating any other type of relationship. The Contractor may adopt such arrangements as it desires with respect to the means, method, and manner of performing the Services under this Agreement, provided that those arrangements are consistent with the proper accomplishment of those Services.

5. Billing. Billing shall occur on a monthly basis and the Town shall endeavor to remit all payments within thirty (30) days after receipt of a correct invoice.

6. Payment Schedule. The Town shall compensate the Contractor for providing the Services pursuant to this Agreement by paying the Contractor the following amounts during the Term of this Agreement:

- a) Three Hundred Sixty-Five Dollars (\$365.00) per month for the Services as outlined in Exhibit A.
- b) Actual invoiced amount(s) upon receipt of a correct invoice for additional materials and supplies required such as Seed, Fertilizer, Weed Killer, etc.

7. Indemnification. The Contractor shall indemnify, defend and hold harmless the Town from and against any and all actions, causes of action, claims and demands and from all damages, losses, costs or expenses of any nature which arise from or occur in connection with the performance by the Contractor, its employees or agents, of any Services under this Agreement, unless such loss or damage results from the Town's gross negligence or willful misconduct.

8. Notices. All notices and other communications required or permitted under this Agreement shall be made in person or to the following addresses:

If to the Contractor: Taylor & Son Landscaping & Mowing
P O Box 631
Monroe, North Carolina 28111
Telephone: 704.283.6286

If to the Town: Town of Mineral Springs
3506 S Potter Road
P.O. Box 600
Mineral Springs, North Carolina 28108
Telephone: 704.243.0505
Fax: 704.243.1705

9. Governing Law. This Agreement shall in all respects be construed in accordance with and governed by the laws of the State of North Carolina.

10. Binding Effect; Assignment. This Agreement and the various rights and obligations arising hereunder shall inure to the benefit of and be binding upon the parties and their respective successors and permitted assigns. This Agreement may not be assigned by either party without the prior written consent of the other party.

11. Counterparts. This Agreement may be executed simultaneously in multiple counterparts, each of which shall be deemed an original but all of which taken together shall constitute one and the same instrument.

12. Entire Agreement. This Agreement and the attached Exhibits embody the entire agreement and understanding of the parties with respect to the subject matter and supersede all prior and contemporaneous agreements or understandings, whether oral or written, related to its subject matter.

IN WITNESS WHEREOF, the parties have caused their authorized representatives to execute this Agreement as of the day and year first above written.

TAYLOR & SONS MOWING & LANDSCAPING

By: _____
Proprietor

TOWN OF MINERAL SPRINGS

By: _____
Mayor

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

Finance Officer Date

EXHIBIT A

Areas to be covered:

Approximately 90,000 square feet of lawn area.

A minimum of three tree areas.

Town Hall sign landscaping area.

One parking lot tree landscaping area.

I. LANDSCAPING AND MAINTENANCE:

A. Mowing

1. Lawn shall be mowed weekly during the growing season and as required during the winter months.
2. The height of cutting shall be maintained consistently to prevent scalping or burn. The mowing height shall be appropriate to the turf species.
3. Excessive grass clippings shall be collected and disposed of; adjacent sidewalks and streets shall be clean of clippings.
4. Mowing patterns shall be alternated each week to avoid creating ruts and compaction.

B. Edging

1. All lawn edges along sidewalks and curbs shall be edged before each mowing during the active growing season (March through October) and as required for appearance for the remainder of the year.
2. Edging shall be performed with a blade type mechanical edger at least once a month; a monofilament line trimmer may be used at all other times on a weekly basis.
3. A monofilament line trimmer shall be used to trim around obstacles within the lawn area. Care shall be taken to insure that the bark of trees and shrubs are not damaged or stripped by the line trimmer.
4. Areas where the grass meets buildings, planters and other vertical surfaces shall be trimmed in a manner to maintain a clean and even meeting point. Herbicides may not be used as a substitute for proper trimming.
5. Edging and trimming is not required around natural un-mulched wooded areas or property boundaries.

C. Debris Removal

1. Litter and trash (including leaves, rubbish, paper, bottles, cans, rocks, gravel, pine cones, sticks), and other debris shall be removed from all areas on a weekly basis.
2. All refuse resulting from the maintenance operation of properties shall be disposed of by the contractor.
3. Hardscape (i.e. sidewalks, driveways, paved surfaces) shall be swept or blown off with a power blower to keep the grounds free of debris on a weekly basis during the growing season. During winter months all grounds shall be policed periodically for trash and debris and blown clear.

4. Paved surfaces and sidewalks shall be weeded as often as necessary to discourage unsightly weed growth. This control shall be accomplished through the selective use of herbicides and mechanical means.

D. Fertilization, Aeration and Reseeding

1. Conduct annual soil tests of representative lawn areas within the first month of the contract.
2. Apply fertilizer and lime, with type, quantity and frequency determined by soil test results.
3. Aerate and seed in the fall (between September 15 and October 31).

E. Weed Control

1. A pre-emergent shall be applied based on season and targeted weeds.
2. All areas shall be kept free of weeds. Chemical and/or mechanical means may be used as appropriate. If any weeding is not performed, maintenance will be considered unsatisfactory.
3. Before applying herbicides, the type of weed shall be identified and the control selected accordingly, using the most effective control for the species, the location and the season.
4. Weeds shall not be allowed to grow in paved areas such as driveways, walks, curbs, gutters, etc. Weeds may be removed manually or sprayed with an herbicide. Dead weeds shall be removed from the paved and mulched areas.

F. Pesticides

1. Shall be applied as necessary.
2. Apply ant control annually.

G. Shrubs

1. Pruning of shrubs shall be done to maintain growth within space limitations, to maintain or enhance the natural growth habit, or to eliminate diseased or damaged growth.
2. Mulching of the shrub and tree beds shall be maintained with fresh mulch in the spring and fall season. Shrub and tree beds shall be kept weed free. Weed control will be accomplished with herbicides when possible and by hand pulling when danger to desirable plant material may exist.
3. Shrubbery should be fertilized in the spring season as needed, unless otherwise agreed to.
4. If mulch is more than 4" in beds, top layer should be removed before new mulch is added to prevent over mulching. Beds should not contain more than 4" of mulch. Mulch shall not be applied to plant stems. Root flare should be visible on all plants.

H. Replacement Plantings

1. The Contractor shall report to the Town any perennial plant material not exhibiting normal growth and vigor. If it has been determined that the material is beyond reviving, a written report recommending replacement shall be given to the Town Clerk. This report shall include: (a) Identify the location, size and type of plant; (b) Identify the reason for the decline; (c) Cost of replacement. No

replacement plantings are to be done without consent of the Town with the exception of annual ornamental plants and flowers.

2. Annual flowers appropriate to the season shall be planted in front of the town hall sign during the months of April and October.

Statement of Proposal
May 28, 2021



COMPREHENSIVE PLAN MINERAL SPRINGS, NC

Submitted by:

B E N C H M A R K

400 CLARICE AVE STE 130
CHARLOTTE, NC 28204

704.933.5990 • 800.650.3925
www.benchmarkplanning.com

CONTENT

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- E Cost Proposal and Schedule 37

“ We listen intently to your community’s concerns and ideas to create places worth celebrating. ”



Weaverville, North Carolina



Sheperdstown, West Virginia



Suffolk, Virginia

May 28, 2021

Town of Mineral Springs
Attn: Vicky Brooks, Town Clerk/Zoning Administrator
3506 S. Potter Road
Mineral Springs, NC 28108

Dear Ms. Brooks and Selection Committee:

On behalf of Benchmark, I would like to thank you for the opportunity to submit our firm's proposal for your consideration as you begin the process of selecting a consultant to assist the Town with the preparation of the Comprehensive Plan. For over 35 years, Benchmark has worked with local governments to develop meaningful, action oriented, and community-driven plans. Our team is comprised of planning, economic development, and urban design professionals who are passionate about their work, and commit the full depth of their experience and talent to each of the projects that we work on.

As our qualifications demonstrate, the core team members assigned to this project possess a diverse array of professional planning experience working on similar projects in communities across the country. Specifically, we have worked with well over 250 municipalities and counties on the development of Comprehensive Plans.

Our team members are well-positioned and have the availability to help the Town lead a successful planning process that engages the entire community and creates a forward-looking, sustainable, action-oriented plan that builds upon the Town's most important assets and opportunities to help define a strong sense of place. We look forward to the opportunity to discuss our proposal with you in the near future. If you have any questions, or need additional information that is not covered in our submittal, please contact me by telephone at 704.305.4381 or by email at jepley@benchmarkplanning.com.

Respectfully,



Jason M. Epley, AICP
President & CEO



A. FIRM PROFILE



Charlotte, NC - Headquarters

Since our founding in 1982, Benchmark Planning's dynamic leadership in the field of urban planning and design has helped our client communities achieve their aspirations through an approach that is best described as the **ART + SCIENCE OF PLANNING** - a philosophy which blends our creative talent with the practical application of our technical expertise.

Headquartered in Charlotte, the Benchmark team has a national planning practice that is focused on comprehensive planning, urban design, land use regulations, downtown development and military community planning. Our talented team of planners has a breadth of experience that provides our clients with the innovative ideas and solutions that are necessary to solve complex problems and develop plans that are grounded in reality and focused on implementation.

PRIMARY LOCATION

Benchmark Planning
Charlotte Office
400 Clarice Ave, Suite 130
Charlotte, NC 28204-2768

YEARS IN BUSINESS

Established in 1982
Incorporated as Benchmark in 1989

OWNERSHIP STRUCTURE

S-corporation

PROFESSIONAL STAFF

Eleven (11) Total Staff

PRINCIPAL IN-CHARGE

Jason M. Epley, AICP
President & CEO
Since 2014

COMPREHENSIVE PLANNING

Preparing comprehensive plans for municipal and county governments is a core component of Benchmark's practice. For over 35 years, Benchmark's team has worked closely with local governments to prepare plans that address our client communities' unique growth and development challenges. Our client base spans a wide range of community types, ranging from small rural communities with several thousand residents to growing suburbs, to larger urban cities and regional organizations spanning multiple counties with hundreds of thousands of residents.

Our team has prepared plans that range from city or county comprehensive plans, to small area plans for revitalizing urban neighborhoods, to planning at the regional scale to address land use compatibility conflicts around military installations. All of our planning efforts are focused on achieving our clients' goals through the development of sound strategic land use guidance that is based on our significant experience and understanding of best practices in the field.

GROWTH MANAGEMENT

Benchmark's team can help your community develop practical plans and strategies to both manage and direct growth to maximize the benefits of your infrastructure investments. We achieve this through complex development capacity and cost/benefit analyses that allow a community to measure both their capacity for growth and its potential impacts. We use the results of these analyses to prepare strategies and policy recommendations that help your community realize the preferred growth scenario and maximize the benefits that it realizes from new growth.

DEVELOPMENT REGULATIONS

Benchmark's team of planning professionals has a wealth of experience both writing and administering a wide variety of development ordinances, including both standalone zoning and subdivision regulations, unified development ordinances, and specialized ordinances dealing with design regulation and similar matters. Our team regularly advises both local governments and private developers on regulatory matters, keeping our team grounded in the practical realities of development practices. This in turn helps to inform and improve the effectiveness of the ordinances that we author.

URBAN DESIGN AND PLACEMAKING

Our interdisciplinary urban design team can help your community prepare practical design concepts and standards based on the unique typologies and character (e.g. downtown centers, commercial corridors, neighborhood infill sites) of your focus area. Our urban designers will identify design solutions and strategies that are based on their practical experience with implementation and best practices that our team has learned through many years of national and international practice in the field.

TRANSPORTATION PLANNING

Our planners understand the critical linkages between transportation and land use, and we strive to seek innovative solutions to our clients' transportation needs. Whether it is identifying new highway corridors to spur economic development, re-imagining a downtown streetscape, or planning routes for a greenway system, our team brings a wealth of experience in solving complex transportation issues. In North Carolina, Benchmark is an NCDOT prequalified consultant for a variety of Transportation Planning tasks and projects.

PUBLIC OUTREACH AND ENGAGEMENT

Our team members facilitate successful public involvement and consensus building through stakeholder interviews, charrettes, pop-up events, focus group meetings and workshops. We leverage the power of technology to support our public engagement activities and facilitate ongoing engagement throughout the planning process, which includes the use of interactive online engagement and real-time digital polling during public meetings..

GIS MAPPING AND ANALYSIS

Our team of GIS analysts and cartographers focus on using the significant power of digital mapping to both produce complex analyses of issues in our client communities and prepare digital mapping products that clearly convey complex ideas in a straightforward and easily understandable manner.

ECONOMIC DEVELOPMENT

Benchmark has extensive experience with assisting local governments with strategic economic development planning and implementation projects. Recent experience includes preparing a working lands study for the Central Midlands Council of Governments in Columbia, SC, and brownfields redevelopment projects in Chapel Hill, NC and Greenwood, SC. Benchmark also works with private entities on economic development planning, including work with the Multi-State Environmental Response Trust on the redevelopment of a former Kerr-McGee industrial site in Navassa, NC and developing a statewide inventory and GIS database of potential rail-served industrial sites for the North Carolina Railroad Company.

SUSTAINABILITY

The Benchmark team is committed to sustainable development practices, and we regularly incorporate these principles into our plans and studies. Our planners have worked on projects that promote sustainable growth coupled with habitat protection for endangered species, coastal resource protection and the conservation of working lands across the country. Beyond environmental sustainability, our team strives to provide our client communities with development strategies and policy guidance that foster growth patterns that limit the impact on finite community resources (school and transportation capacity, public safety services, utilities, etc.), while allowing growth to continue in an orderly and rational manner that is responsive to market demands.



Myrtle Beach, SC - Downtown Master Plan

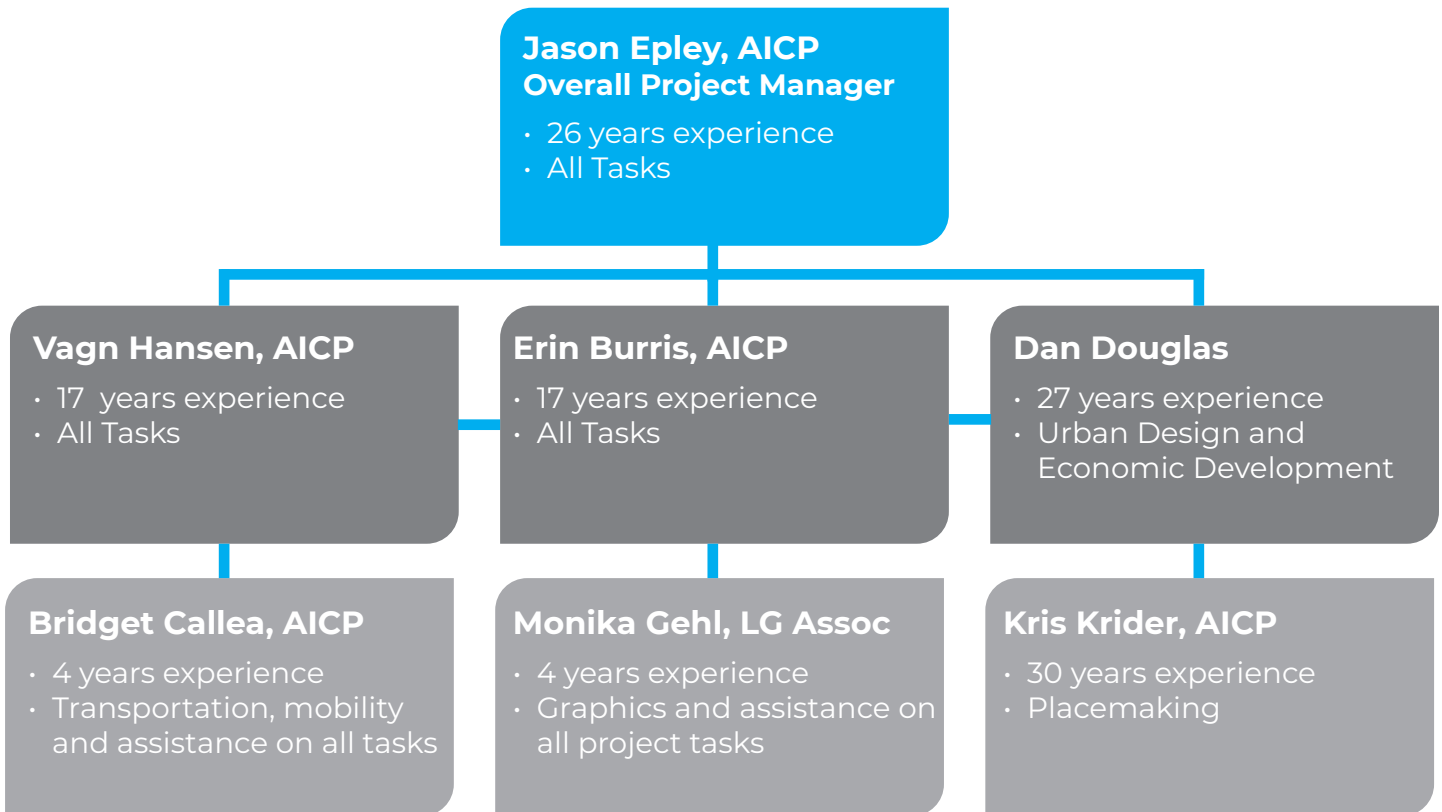


B. PROJECT TEAM

PROJECT MANAGER & PROJECT TEAM

The project team was chosen based on their unique skills and extensive experience working with similar communities. Benchmark’s President, Jason Epley, AICP, will be the project manager responsible for the completion of the project on-time and on-budget. Jason has over 26 years of experience in the planning profession, and has served in a variety of roles over his career, including as a downtown coordinator, as a planner for local governments in North and South Carolina, as a regional planner with the North Carolina Department of Commerce, and, for the last 13 years, as a consultant in private practice serving a national client base. Vagn Hansen, AICP and Erin Burris, AICP will be serving as the senior planners assisting Mr. Epley with the overall scope of the project, organizing the project team, and directing the day-to-day planning effort.

Other senior members of the consulting team include Dan Douglas, who serves as Benchmark’s Director of Urban Design in Raleigh, and Kris Krider, AICP, our senior associate in Urban Design, who served as the Planning Director in Davidson, NC during the Town’s transformative years. Dan and Kris are both national experts in the field of placemaking and urban design. Additional staff support will be provided by Bridget Callea, AICP in the areas of background research, transportation/mobility, and general project support. Monika Gehl, LEED Green Associate, will provide assistance with research and graphic production. Other team members will be on stand-by as needed during the process.





JASON M. EPLEY AICP

President & CEO | Benchmark

Mr. Epley brings over 25 years of national experience in the planning profession to Benchmark’s consulting team. Currently the President of Benchmark CMR, Inc., Jason’s past positions have included working with municipal, county, regional and state government planning programs throughout North Carolina. He specializes in comprehensive planning, economic development, urban design, public involvement, and meeting facilitation. Jason brings additional expertise and experience with downtown development and design, and currently serves in the role of Executive Director of the North Carolina Downtown Development Association. He has a wealth of experience helping communities develop meaningful plans and sound implementation strategies through ordinance preparation and adoption, with project experience in well over 150 communities across the country.

Education

Master of City and Regional Planning, Clemson University
BA Geography, University of North Carolina - Greensboro

Certifications/Memberships

Member, American Institute of Certified Planners
Member, American Planning Association
Executive Director, NC Downtown Development Association
Member, National Society of Certified Public Managers
Member, National Trust for Historic Preservation

Relevant Experience

- Comprehensive Plan
Jamestown, NC
- Comprehensive Plan
Waxhaw, NC
- Comprehensive Plan
Covington, VA
- Comprehensive Plan
Shepherdstown, WV
- Comprehensive Plan
Blowing Rock, NC
- Comprehensive Plan
Nags Head, NC
- Comprehensive Plan
Weaverville, NC
- Comprehensive Land Use Plan
Cleveland County, NC
- Downtown Master Plan
Suffolk, VA
- Downtown Master Plan
Myrtle Beach, SC
- Downtown Master Plan
Concord, NC
- Downtown Redevelopment Study
Wilmington, NC
- Redevelopment Study
Chapel Hill, NC
- Urban Design Study
Winston-Salem, NC
- Bicycle & Pedestrian Master Plan
Clinton, NC



ERIN BURRIS AICP

Senior Associate | Benchmark

Ms. Burris brings 17 years of experience in the planning field to the consulting team. Her professional experience has been focused primarily in North Carolina where she has served as a planner for municipal governments and now in the private sector. Ms. Burris specializes in comprehensive planning, development ordinances, and zoning and subdivision administration. With a background in both architecture and planning, Ms. Burris focuses a significant portion of her practice on urban design issues and assisting communities with the development of standards and guidelines that achieve high quality outcomes in the built environment.

Education

MA Geography, University of North Carolina - Charlotte

BA Architecture, University of North Carolina - Charlotte

Certifications/Memberships

Member, American Institute of Certified Planners

Member, American Planning Association

Relevant Experience

Comprehensive Plan
Bermuda Run, NC

Comprehensive Plan
Mount Airy, NC

Comprehensive Plan
Forest City, NC

Comprehensive Plan
Pleasant Garden, NC

Comprehensive Plan
Weaverville, NC

Comprehensive Plan
Marshall, NC

Comprehensive Plan
Yadkinville, NC

Comprehensive Plan
Mount Pleasant, NC

Long Range Plan Review
Fayetteville, NC

Zoning Ordinance
Morganton, NC

Unified Development Ordinance
Mineral Springs, NC

Unified Development Ordinance
Yadkinville, NC

Zoning Ordinance
Colleton County, SC

Sign Ordinance
Concord, NC

Unified Development Ordinance
Walterboro, SC



VAGN K. HANSEN AICP

Senior Planner | Benchmark

Mr. Hansen brings over 17 years of experience in the planning profession to the consulting team. He has worked with large and small municipalities, as a consultant for the NC Department of Commerce and has been in private practice for the last 12 years. Mr. Hansen specializes in comprehensive planning, geographic information systems, military planning and land use regulations. A primary focus of his practice is performing complex spatial analyses to help local governments make informed decisions on land use, infrastructure, and related growth management policies. In addition to his consulting practice, Mr. Hansen has supervised municipal planning and zoning administration services for several of Benchmark’s client communities in North Carolina and South Carolina over the years.

Education

MA Applied Geography, University of North Carolina - Greensboro

BA Geography, University of North Carolina - Wilmington

Certifications/Memberships

Member, American Institute of Certified Planners

Member, American Planning Association

Relevant Experience

Comprehensive Plan
Aiken, SC

Comprehensive Plan
Gatesville, TX

Comprehensive Plan
Archdale, NC

Comprehensive Plan
Covington, VA

Comprehensive Plan
Jamestown, NC

Comprehensive Plan
Blowing Rock, NC

Neighborhood Plan
Cape Girardeau, MO

Downtown Master Plan
Concord, NC

Redevelopment Plan
Chapel Hill, NC

Redevelopment Plan
Navassa, NC

Multi-Jurisdictional Land Use Plan
Sanford, NC

Zoning and Subdivision Ordinances
Onslow County, NC

Comprehensive Plan
Bermuda Run, NC

Comprehensive Plan
Weaverville, NC

Comprehensive Plan
Mount Pleasant, NC



DANIEL T. DOUGLAS

Director of Urban Design | Benchmark (Raleigh)

Dan is well known for his dynamic leadership in transforming Downtown Raleigh as the founder and Director of the Raleigh Urban Design Center. He led the city’s strategic planning effort that has now leveraged over \$3.5 billion dollars of downtown investment. In 2008, Mr. Douglas was honored to receive the first ever Downtown Advocate Award from the Downtown Raleigh Alliance.

Dan has prepared planning studies and downtown plans in Raleigh, Wilmington, Chapel Hill, Concord and Wrightsville Beach in North Carolina; Rock Hill, Spartanburg, Myrtle Beach and Clemson in South Carolina; Long Beach, California, Anchorage Alaska. Dan also gained significant international planning experience working on large scale new city projects in the Kingdom of Saudi Arabia and the Kingdom of Morocco.

Dan is a sought after speaker on the topic of urban revitalization. He has been a guest on NPR’s The State of Things. He has spoken at over 20 conferences – locally, nationally and internationally. In 2007, Dan won a prestigious Eisenhower Fellowship – spending 8 weeks traveling throughout Europe – studying sustainable economic development, the effects of the introduction of high speed rail on urban centers and the influence of the creative class in European city centers.

Education

Master of City and Regional Planning, Clemson University
BS Architecture, Clemson University

Relevant Experience

- Comprehensive Plan Archdale, NC
- Regional Tourism Development Plan Wake County/Raleigh, NC
- Downtown Master Plan Suffolk, VA
- Downtown Master Plan Chapel Hill, NC
- Downtown Master Plan Raleigh, NC
- Downtown Master Plan Concord, NC
- Downtown Master Plan Myrtle Beach, SC
- Redevelopment Study Rock Hill, SC
- Redevelopment Study Wilmington, NC
- Downtown/Waterfront Plan Anchorage, AK
- Downtown Retail Vision Long Beach, CA
- Downtown Master Plan Raleigh, NC
- Hillsborough Street Corridor Plan Raleigh, NC
- Union Station Reuse & Market Study Goldsboro, NC



KRIS KRIDER AICP

Senior Associate - Urban Design | Benchmark (Arlington)

Mr. Krider brings more than 30 years of national public and private planning and design experience to the Benchmark team. A member of the Benchmark team since 2011, Kris currently directs the Urban Design and Research Division in the Arlington County, Virginia Planning Department while continuing his role as a senior advisor for Benchmark on urban design and sustainable growth. Prior to joining Benchmark, Kris served as the Planning Director in the Town of Davidson, North Carolina where he led a number of high profile urban design projects, including the planning and development of the Griffith Street corridor at Exit 30 on Interstate 77, and numerous downtown development projects in the town's historic business district, which is also home to Davidson College. Prior to his tenure in Davidson, Mr. Krider served as Senior Urban Designer for two nationally recognized design firms in San Francisco after receiving his graduate training in architecture from the University of California - Berkeley.

Education

MA Architecture, University of California at Berkeley
BA Architecture, University of North Carolina - Charlotte

Certifications/Memberships

Member, American Institute of Certified Planners
Member, American Planning Association
LEED Green Associate

Relevant Experience

- Urban Design Plan
Winston-Salem, NC
- Courthouse Square Sector Plan
Arlington County, VA
- Walnut Hills Redevelopment Plan
Cincinnati, OH
- Oak to 9th Development Plan
Oakland, CA
- NC 73 Land Use & Economic Plan
Davidson, NC
- Comprehensive Plan
Weaverville, NC
- Comprehensive Plan
Shepherdstown, WV
- Comprehensive Plan
Blowing Rock, NC
- Huntington Main Street Plan
Huntington, WV
- Bicentennial Master Plan
Lawrenceburg, IN
- Lawndale Drive Corridor Plan
Greensboro, NC
- Downtown Workshop
Mayodan, NC
- Comprehensive Plan
Archdale, NC
- Downtown Master Plan
Suffolk, VA
- Urban Design Master Plan
Concord, NC



BRIDGET CALLEA AICP

Urban Planner | Benchmark

Ms. Callea joined Benchmark Planning in June of 2019. Prior to joining Benchmark, Ms. Callea was a Planner with WGI, a national design firm in the public and private infrastructure markets.

Ms. Callea holds a Master’s degree in Urban and Regional Planning from Florida State University where she received the APA-FL Chapter Outstanding Planning Student of the Year and a Bachelor of Arts degree in Architectural Studies from Hobart & William Smith in Geneva, New York. Ms. Callea specializes in comprehensive planning, transportation planning and urban design, assisting the Benchmark Planning team with meeting facilitation, background research, plan illustration, GIS mapping, and related project tasks.

Education

MSP Urban & Regional Planning, Florida State University
BA Architectural Studies, Hobart & William Smith Colleges

Certifications/Memberships:

Member, American Institute of Certified Planners
Member, American Planning Association
Member & Communications Chair, Regional and Intergovernmental Planning Division of APA
Certified Charrette System, National Charrette Institute

Relevant Experience

- Comprehensive Plan Archdale, NC
- Comprehensive Plan Person County, NC
- Comprehensive Plan Roxboro, NC
- Comprehensive Plan Colleton County, SC
- Comprehensive Plan Jamestown, NC
- Comprehensive Plan Cleveland County, NC
- Industrial Redevelopment Feasibility Fletcher, NC
- Code Amendments West Palm Beach, FL
- Future Land Use Amendments Palm Beach County, FL
- Complete Streets Project West Palm Beach, FL
- Downtown Parking Approvals Lake Worth, FL
- Comprehensive Plan Jamestown, NC
- Outdoor Activity/Entertainment Overlay District Feasibility St. Lucie County, FL
- Corridor Streetscape Plan Palm Beach County, FL



MONIKA GEHL LEED GREEN Associate

Urban Designer and Urban Planner | Benchmark (Austin)

Ms. Gehl joined Benchmark Planning in June of 2017 after receiving her Bachelors of Urban & Environmental Planning and Bachelor's in Global Studies: Environment and Sustainability from the University of Virginia, School of Architecture. In addition to her work with Benchmark, Ms. Gehl worked with the Piedmont Development Group where she assisted with a variety of development applications and entitlements, technical writing and project illustrations. Ms. Gehl assists the Benchmark Planning team in the areas of background research, GIS mapping, plan illustration and related project tasks.

Ms. Gehl's greatest contribution to the Benchmark team is her exceptional ability to prepare high-quality graphics and illustrations that effectively communicate complex planning and development concepts for our clients. Whether preparing site plans depicting alternative development scenarios or 3D renderings of a downtown block, her combination of practical planning knowledge, technical skill, and artistic ability provide our client communities with a firm understanding of each project's vision. She is currently working toward a MS in Community and Regional Planning at the University of Texas while working for Benchmark in Austin.

Education

MS Community and Regional Planning, University of Texas (Candidate)
BUEP Urban & Environmental Planning, University of Virginia
BA Global Studies, University of Virginia

Certifications/Memberships

LEED Green Associate
Member, American Planning Association

Relevant Experience

Comprehensive Plan
Jamestown, NC

Downtown Master Plan
Suffolk, VA

Downtown Master Plan
Myrtle Beach, SC

Comprehensive Plan
Jamestown, NC

Redevelopment Study
Chapel Hill, NC

Comprehensive Plan
Archdale, NC

Neighborhood Plan
Cape Girardeau, MO

Comprehensive Plan
Covington, VA

Comprehensive Plan
Gatesville, TX

Multi-Jurisdictional
Land Use Plan
Sanford / Lee County, NC

Regional Land Use Study
Fayetteville, NC

Redevelopment Study
Navassa, NC

Small Area Plan
Killeen, TX

Regional Land Use Study
Little Rock, AR

C. REFERENCES AND EXAMPLE PROJECTS

Client: **Town of Blowing Rock, NC**

Contact: Kevin Rothrock, AICP, Planning Director
Phone: 828.295.5240
Email: kevin@townofblowingrocknc.gov
Projects: Comprehensive Plan, Corridor Vision Plan, and Sign Ordinance Update

Client: **City of Myrtle Beach, SC**

Contact: Lauren Clever, Downtown Director
Phone: 843.918.1055
Email: clever@cityofmyrtlebeach.com
Project: Downtown Master Plan, Downtown Implementation Planning

Client: **Town of Jamestown, NC**

Contact: Matthew Johnson, AICP, Assistant Town Manager / Planning Director
Phone: 336.454.7386
Email: mjohnson@jamestown-nc.gov
Projects: Development Plan Review, Comprehensive Plan

Client: **Alleghany County, VA**

Contact: Jon Lanford, County Manager
Phone: 540.863.6600
Email: jlanford@co.alleghany.va.us
Projects: City of Covington/Alleghany County Joint Comprehensive Plan

Client: **City of Archdale, NC**

Contact: Jason Miller, PhD, AICP, Planning Director
Phone: 336.434.7334
Email: jmiller@archdale-nc.gov
Projects: Comprehensive Plan

Client: **City of Suffolk, VA**

Contact: David Hainley, AICP, Planning Director
Phone: 757.514.4060
Email: dhainley@suffolkva.us
Projects: Downtown Master Plan

Client: **Town of Louisburg, NC & Colleton County, SC**

Contact: Philip Slayter, AICP, Planning & Zoning Administrator
Phone: 919.497.1003
Email: pslayter@townoflouisburg.org
Project: Comprehensive Plan (current project with Louisburg)
Comprehensive Plan (Colleton County 2009 & 2019)
Zoning & Subdivision Ordinances (Colleton County 2010)



Comprehensive Plan

Blowing Rock, North Carolina

In 2013, Benchmark Planning was engaged by the Town of Blowing Rock to prepare an update to its comprehensive plan. Blowing Rock is an historic mountain resort community that serves as the gateway to the NC High Country, and is the de facto cultural capital of the region. With numerous ski resorts, National and State Parks, and a direct connection to the Blue Ridge Parkway, Blowing Rock is a year-round destination for vacationers. Blowing Rock has also emerged as a highly regarded retirement destination, which has led to significant increases in economic activity in the local healthcare industry.

Benchmark led the community through a year-long planning process, engaging with the community through intensive workshops that were designed to explore different scenarios that could shape the town's future. Among the focus areas in the plan were downtown development, the ongoing expansion of Valley Boulevard (US 321 Bypass), the redevelopment of the former hospital site and the anticipated growth around the site of the new

hospital. The resulting plan that was adopted by the Town Council established a 10 year vision for the community that defines a policy framework that will guide the community toward achieving the vision that it established through the planning process.

Middle Fork Greenway Development Con-

- ① New Buildings Fronting Greenway
- ② Interconnected Parking Facilities
- ③ Middle Fork Greenway Extension
- ④ Enhanced Landscaping / Public



Contact:
Phone:
Email:

Kevin Rothrock, AICP, Planning Director
828.295.5240
kevin@townofblowingrocknc.gov

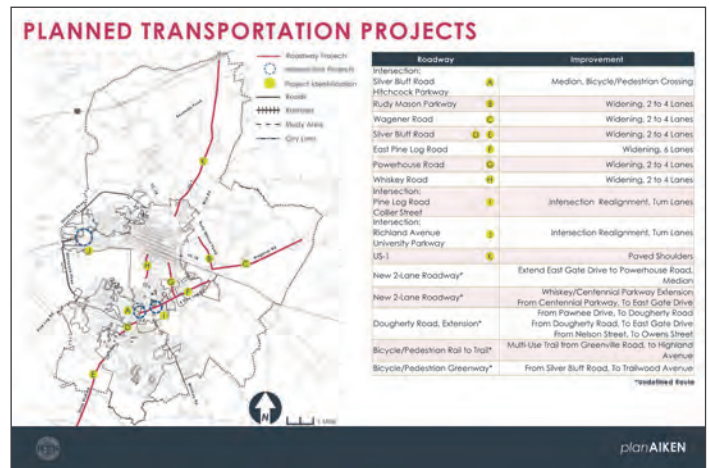


Comprehensive Plan

City of Aiken, South Carolina

The City of Aiken, SC (pop. 29,524) commissioned Benchmark Planning to prepare an update to its comprehensive plan in 2016. With a thriving historic core that represents one of the few planned cities in the South of its vintage, the city has blossomed over the years into a destination for equestrian activities and golfing. Located in close proximity to both the Department of Energy's Savannah River Site and Augusta, GA, Aiken has benefited significantly from the economic growth in the region. The focus of the planning effort will be to establish a framework for continued growth and economic development that also preserves the city's character.

The Comprehensive Plan examined key focus areas and growth outside of the City's municipal boundary within the utility service area. The key themes of the plan included 1) Growth; 2) Connectivity; 3) Transformation; 4) Consistency; 5) Balance; and 6) Investment. Public engagement has included, workshops across the City, stakeholder/focus group meetings, an online website, and meetings with the Planning Commission.



Contact: Ryan Bland, Planning Director
 Phone: 803.642.7608
 Email: rbland@cityofaikensc.gov



Comprehensive Plan

Town of Waxhaw, North Carolina

Waxhaw, a historic town with over 16,000 population, is located in the southern Piedmont region of North Carolina, approximately twenty miles south of Charlotte. Established in 1889, Waxhaw has a rich history that spans several decades. Waxhaw is striving to strike a healthy balance between growth pressures from the Charlotte metropolitan region and the preservation of their historic character. Benchmark prepared the Town of Waxhaw's update to its Comprehensive Plan in 2015, combing existing plans into the new and revised document. The plan update included extensive public participation through surveys, public meetings and events, and online engagement through a project website. The final plan document had a strong implementation and prioritization focus to guide the future of the Town.

COMPREHENSIVE PLAN UPDATE



Get Involved



Download the Comment Form
Post to social media using
#thisismyWaxhaw
or Email your form to:
thisismyWaxhaw@waxhaw.com

Upcoming Events

Public Meetings



Public Meetings

Thank you for attending the sessions on May 6th and 8th! Come out on May 7th to hear the summary.



Existing Plans

Comprehensive Plan (2009)
Small Area Plans
Recreation Plan
Parks & Rec Cultural Master Plan

Contact:

Phone:

Email:

Jeffrey Wells, AICP, Town Manager

704.843.2195

jwells@waxhaw.com



Downtown Master Plan (2020)

City of Dillon, South Carolina

The City of Dillon is poised for development and growth from the State of South Carolina's investment in the Inland Port. Inland Port Dillon just opened in 2018 and is the heart of the 3,400-acre Carolinas I-95 Mega Site with CSX rail access. In addition to the growth expected from the opening of the Inland Port, the City is working with business owners, property owners and the entire community to improve downtown, expanding daytime opportunities and establishing evening dining and entertainment options. As the County Seat of Dillon County, Dillon's daytime population expands to over 18,000 people. The City hired Benchmark Planning to help develop strategies to encourage private reinvestment in downtown buildings, while exploring ways to improve evening dining and entertainment options. The Downtown Master Plan highlights actions and strategies the public and private sectors should implement to improve downtown.

Contact: Glen Wagner, City Manager
 Phone: 843.774.0040
 Email: gwdillon@bellsouth.net



Existing Conditions



After Illustration (currently under construction)



Comprehensive Plan and Land Use Regulations (2009 and 2019)

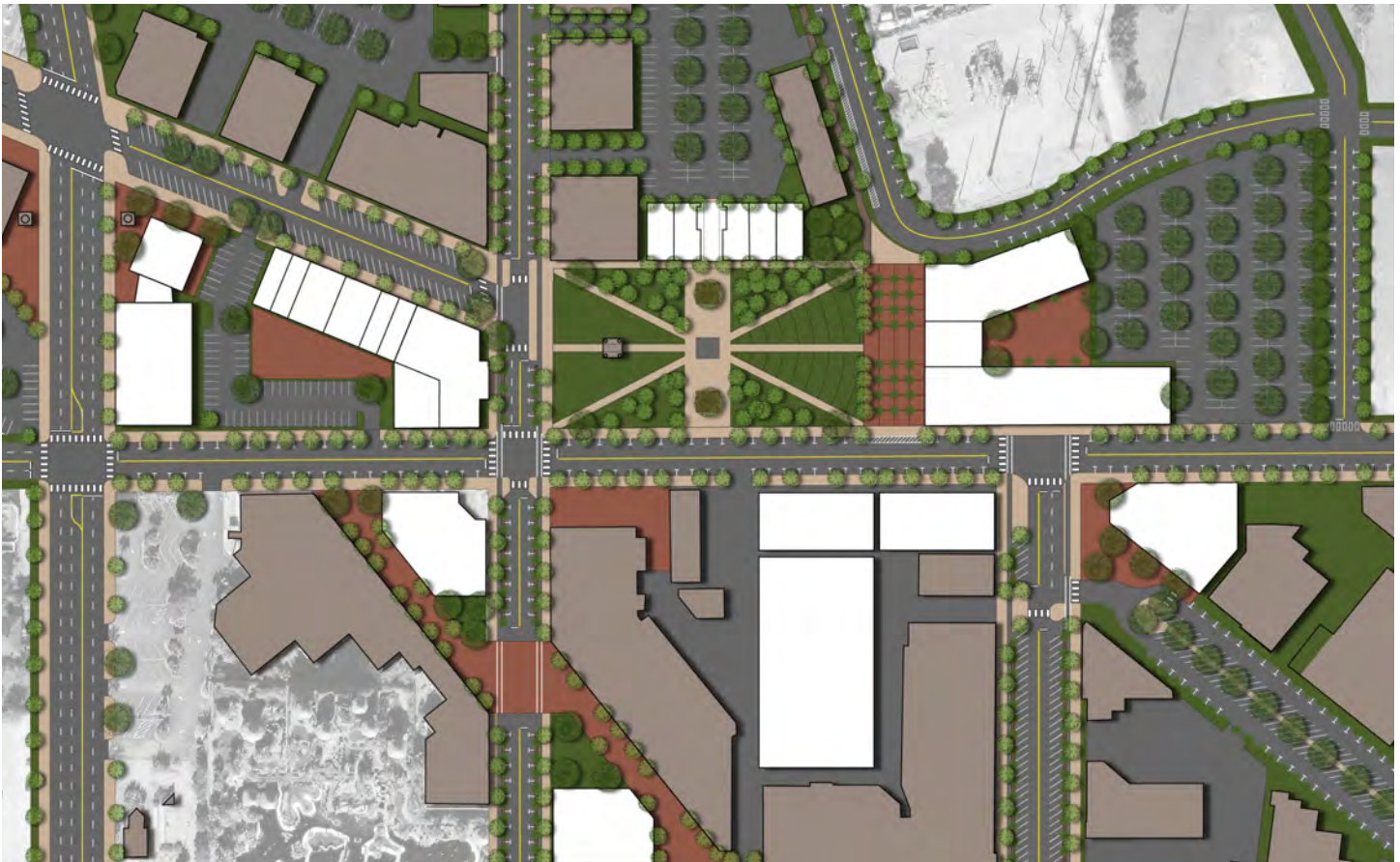
Colleton County and Town of Cottageville , South Carolina

Colleton County, South Carolina is located in the heart of a National Wildlife Refuge and National Estuarine Research Center that encompasses a total of 350,000 acres primarily across Beaufort, Charleston, and Colleton counties. In 2009, Benchmark prepared the 10-year Comprehensive Plan update that led to the rewrite of the County's Zoning and Land Development Ordinance. The new land use regulations, prepared by Benchmark, were adopted in 2010 and included diagrams and illustrations to demonstrate the intent of the ordinance in a visual manner.

In 2018, the County retained the services of Benchmark to prepare the current 10-year update to the Comprehensive Plan. The process has included stakeholder meetings, a public survey and public meetings at three locations across the county. The plan update is a joint plan, including the Town of Cottageville's jurisdiction. An emphasis was placed on protecting the County's natural resources and sense of place, directing growth toward the county's municipalities where infrastructure can accommodate development. The plan was adopted in January of 2020.



Contact: Zach Montgomery, Planning Director
Phone: 843.549.1701
Email: zmontgomery@colletoncounty.org



Downtown Master Plan (2018 + Ongoing Implementation)

City of Myrtle Beach, South Carolina

The City of Myrtle Beach hired Benchmark Planning to work closely with City Council on the development of a Downtown Master Plan. The Myrtle Beach area is currently ranked as the second fastest-growing metropolitan area in the country and is one of the major centers of tourism in the United States, attracting an estimated 18 million visitors each year. Myrtle Beach was built on tourism, and while the City and the surrounding community has experienced unprecedented residential growth for a number of years, tourism is still at the core of the local economy. Benchmark engaged local business owners, property owners, elected officials, leaders of various public agencies, SCDOT, city department heads and others in an extensive stakeholder input process, meeting with over 100 key stakeholders in listening sessions. The master plan process included a day-long work shop that attracted over 400 residents. Benchmark is currently under contract to assist the city with the Master Plan implementation process.

Contact: Lauren Clever, Downtown Director
 Phone: 843.918.1055
 Email: clever@cityofmyrtlebeach.com



Plan implementation status:

- City property renovations for private investors
- City initiated Arts & Innovation District rezoning
- Coordination with SCDOT on road improvements
- City updates provided to development community
- Architect hired to design public investments
- City Master Plan Implementation Team meetings
- Historic District designation and approval
- Coastal Carolina University downtown theater

LUMBERTON TOMORROW

Lumberton will direct growth and investment toward areas within the city to energize and strengthen its neighborhoods, businesses, and overall quality of life.

The City's vibrant future will be supported by enhanced connections between the Downtown, the River and gateways, as well as growth policies that promote economic prosperity, healthy living, and preservation of the City's unique southern charm.



Land Use Plan (2015) City of Lumberton, North Carolina

A City of 21,823, Lumberton is located within the Coastal Plains region of southeastern North Carolina nestled along the banks of the Lumber River. The City is a regional hub of business activity positioned at the crossroads of Interstate 95 and Interstate 74 (US 74). Lumberton's geographic location at the midpoint between New York and Florida has led to the development of the hospitality industry along Interstate 95. Hotels and restaurants serve travelers and provide employment opportunities within the region.

The City offers many historic, cultural and outdoor recreational opportunities. One of the City's greatest assets, the Lumber River, is designated as a National Wild and Scenic River and one of North Carolina's Top Ten Natural Wonders - meandering over 115 miles and passing through the 9,138 acre Lumber River State Park. The river provides a year-round backdrop of beauty and outdoor recreation opportunities for residents and visitors to the region.

The City's Comprehensive Land Use Plan establishes key recommendations to revitalize the downtown, older industrial areas, historic neighborhoods and legacy commercial corridors

through a series implementation actions that enhance connections between the downtown, the river and Lumberton's gateways, ensuring a vibrant future focused on healthy living.



Contact: Brandon Love, Deputy City Manager
Phone: 910-671-3806
Email: blove@ci.lumberton.nc.us

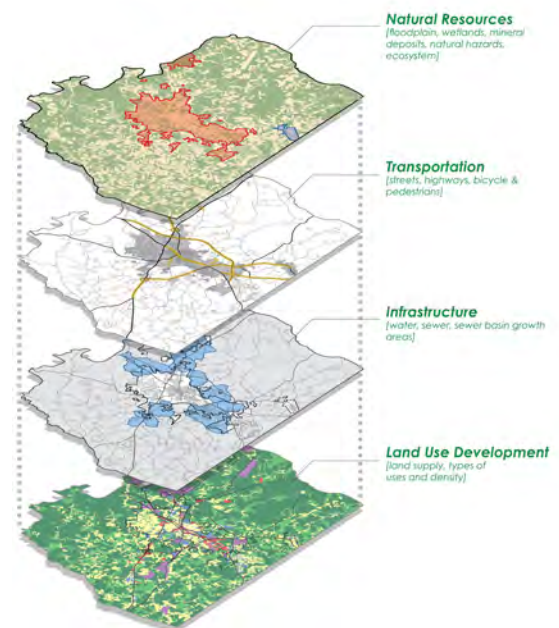


Multi-Jurisdictional Land Use Plan (2018)

Sanford / Broadway / Lee County, North Carolina

Benchmark recently developed a multi-jurisdictional land use plan for the City of Sanford, Lee County, and the Town of Broadway under the guidance of the Joint Planning Commission, which is a standing committee comprised of elected and appointed officials of each participating jurisdiction. The land use plan is intended to serve as both a physical and policy plan to guide each jurisdiction over the next 10 to 20 years; directing urban growth to areas that are readily served by urban services and infrastructure, while designating significant portions of the county for ongoing use for agriculture and other working lands.

The plan utilizes a “place type” system for the future land use map. This system incorporates traditional land use designations with character, infrastructure, and transportation guidance to provide the communities with a full spectrum of land use and development guidance. Following its adoption, the communities plan to begin a joint project that will realign their land use regulations with the guidance developed for the plan, enabling them to incorporate the land use guidance into their regulatory framework and begin implementing the desired land use vision for their communities.



Contact: Marshall Downey, AICP
 Planning Director
 Phone: 919.718.4657
 Email: marshall.downey@sanfordnc.net



Comprehensive Plan (2017)

Town of Bermuda Run, North Carolina

Benchmark has led the preparation of two Comprehensive Plan's for the Town of Bermuda Run. The development of each plan included significant public input and web-based participation methods. Benchmark utilized public workshops, online surveys and the project website to allow residents a variety of opportunities to express their ideas and vision for the future of the Town.

The Town worked diligently on the implementation of strategies of the 2012 Comprehensive Plan to achieve the vision and goals established by the plan. Due to the successful implementation of many of the plan's strategies, and to take advantage of new opportunities, the Town initiated an update in February of 2017. Benchmark worked with the Planning Board as the project steering committee to take inventory of the 2012 Plan's accomplishments, and evaluate the overall direction for the next five to ten years.

The updated plan was adopted in November 2017 and sets the "blueprint" for the future of Bermuda Run with a bold, clear vision and focused goals with a ten-year time frame and five-year implementation focus. The Plan looks at past and current development trends and plans, analyzes demographic and economic data, captures an image of what the community desires, and presents prioritized methods to fulfill the vision. It is the vision of what the community wants to become and the strategies to follow in order to realize that vision. The Plan is comprised of goals and strategies that provide a framework for decision-making and the allocation of resources as they relate to the long-term development of the town. It builds upon existing assets while taking advantage of opportunities for improvement and growth. The Plan is implemented over time through annual budgeting, departmental work programs, zoning decisions, and development projects.

Contact: Lee Rollins, Town Manager
Phone: 336.998.0906
Email: lrollins@townofbr.com



Comprehensive Plan (2020)

City of Archdale, North Carolina

Archdale, NC (pop. 11,538) engaged Benchmark in mid-2019 to prepare a new Comprehensive Plan for the city that would focus on four major themes that had emerged during previous planning processes that the City had undertaken - Placemaking, Growth Management, Economic Diversification and Livability.

Benchmark's consulting team prepared an extensive public engagement process that included robust digital outreach, coupled with a series of interactive community meetings that took place over a period of three months during the middle of the planning process. This included a week-long placemaking workshop that focused on the identification of a location and concept development to establish a new downtown.

Contact: Jason Miller, PhD, AICP, Planning Director
Phone: 336.434.7334
Email: jmiller@archdale-nc.gov

A unique aspect of this planning process was the incorporation of the AARP Livable Communities data into the process, and the use of the program's livability factors to guide the development of recommendations for the Livability focus area of the plan. As implementation of the plan moves forward, the City is developing standing committees to focus on groups of aligned livability factors to ensure that they receive the necessary attention and priority in line with the recommendations for the other three focus areas of the plan.





Comprehensive Plan (2016) City of Mount Airy, North Carolina

The City of Mount Airy (pop. 10,417), (known famously as the inspiration for Andy Griffith’s fictional Mayberry) is located in North Carolina’s Yadkin Valley wine region, with breathtaking views of the Blue Ridge mountains and the rugged pinnacle of nearby Pilot Mountain. Benchmark prepared the city’s very first Comprehensive Plan, building on previous land use and strategic planning efforts, engaging citizens, business leaders and elected officials through a participatory process.

Benchmark worked closely with the Planning Board and the public throughout the process to develop this meaningful and action oriented comprehensive plan. In addition to traditional comprehensive plan topics, this plan focused heavily on branding and aesthetic improvements, particularly in the city’s downtown core in an effort to enhance the city’s standing as premier regional tourism destination. The resulting plan has led to significant investment in the city and surrounding area, with a focus on projects that have enhanced the community as a tourism destination, particularly focused on the growing wine tourism industry and outdoor recreation tourism.



GRANITE



GROOVES



ROCKING



GRAPES

Contact:
Phone:
Email:

Barbara Jones, City Manager
336.786.3502
bajones@mountairy.org



Comprehensive Plan (Current Project)

Town of Jamestown, North Carolina

The historic Town of Jamestown is part of the Piedmont Triad region and is located in Guilford County, North Carolina. Jamestown shares a border with both the City of High Point and the City of Greensboro and is positioned near I-85 Business and I-73, only 10 miles southeast of Piedmont Triad International Airport. The Town, approximately 4,300 in population, continues to identify ways to preserve and enhance a high quality of life for all residents to enjoy. The Town has hired Benchmark Planning to work closely with a Comprehensive Plan Committee to prepare a Plan that identifies strategies and actions to support economic diversification, growth management, and creating an even greater sense of place.

We rarely list projects as references that are not yet completed; however, we wanted to provide you with a reference for a community where we are working creatively to receive public input during this challenging time.



Contact: Matthew Johnson, AICP
Assistant Town Manager / Planning Director
Phone: 336.454.7386
Email: mjohnson@jamestown-nc.gov



Downtown Redevelopment Plan, Site & Market Analysis (2018)

New Hanover County | Wilmington, North Carolina

Over the past five years, Downtown Wilmington has experienced significant growth and development with over \$346 million worth of new investments transforming the historic Downtown. Recently completed projects include new facilities for retail, restaurant, office, residential and hospitality users. More projects are underway or announced that will further grow the retail, hospitality and residential base.

With this influx of activity, New Hanover County government and other civic leaders recognized an opportunity exists to leverage an existing County-owned parking deck and underused public property surrounding the deck to attract more growth and maximize this asset. To move forward, New Hanover County, working with Wilmington Downtown Incorporated (WDI) selected

the Benchmark Kimley-Horn team to conduct a Market Demand Analysis to determine viable development opportunities for the Downtown central business district and a Site Analysis to examine land use codes and architectural issues that could lead to the redevelopment of the entire one block site.

The study included the development of four market-based scenarios that examined public infrastructure investment and the return on investment projections from private real estate development. At the conclusion of the study, the County contracted with Benchmark to lead Phase Two of the project. Benchmark is working closely with County staff and stakeholders to facilitate the redevelopment of the entire downtown block.

Contact: Jennifer Rigby, AICP
Strategy & Policy Coordinator
Phone: 910.798.7237
Email: jrigby@nhcgov.com



Brownfield Redevelopment Plan (2017)

Multistate Trust / Town of Navassa, North Carolina

From 1936 until 1974, the Kerr-McGee Chemical Corporation operated a wood treatment facility on the banks of the Brunswick River in the historic African-American community of Navassa. When the plant ceased operation, the plant was dismantled, but years of operations prior to meaningful environmental regulation left behind a legacy of creosote contamination on the 245 acre site. Following the bankruptcy of a holding company created by Kerr-McGee, the Multistate Environmental Response Trust was appointed to oversee the remediation and redevelopment of the now designated Superfund site in partnership with EPA, the State of North Carolina, the Town of Navassa and other local, state and federal stakeholders.

With a mandate from EPA to secure community support for the remediation and redevelopment of the site, the Multistate Trust engaged Benchmark in 2017 as part of a multi-faceted planning process with extensive public input that brought together a wide range of experts to engage the Town and its residents as a plan was developed for the site. With the planning process now

successfully completed, the Trust is now moving forward with the remediation process and marketing the site for redevelopment in accordance with the community based vision.



Contact:

Richard Elliot, Senior Project Manager
Greenfield Environmental Trust Group

Phone:

617.953.1154

Email:

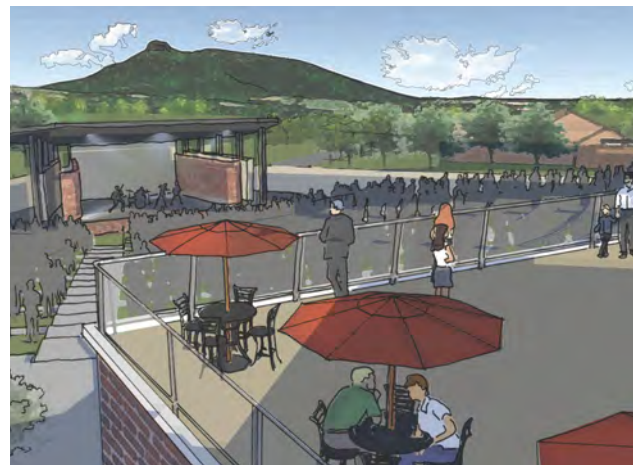
re@g-etg.com



Downtown Vision & Streetscape Master Plan (2018)

Town of Pilot Mountain, North Carolina

The Town of Pilot Mountain is nestled within the Yadkin Valley Appellation at the foot of its landmark namesake; the striking pinnacle knob that rises from the ancient Sauratown Mountain chain. The town provides opportunities to connect with nature by exploring the beautiful Pilot Mountain State Park and enjoying the richness of its charming downtown and wineries. Benchmark Planning worked closely with Pilot Mountain on the development of a downtown vision and streetscape master plan to support private investment in downtown. The plan examined the physical layout of the pedestrian, parking and vehicular zones to prepare a vision and strategy for improving the downtown and overall function and design of the streetscape. The plan includes an entertainment venue and amphitheater positioned to preserve views of the pinnacle knob of the mountain at Pilot Mountain State Park.



Contact: Michael Boaz, Town Manager
Phone: 336.444.3000
Email: mboaz@pilotmountainnc.org



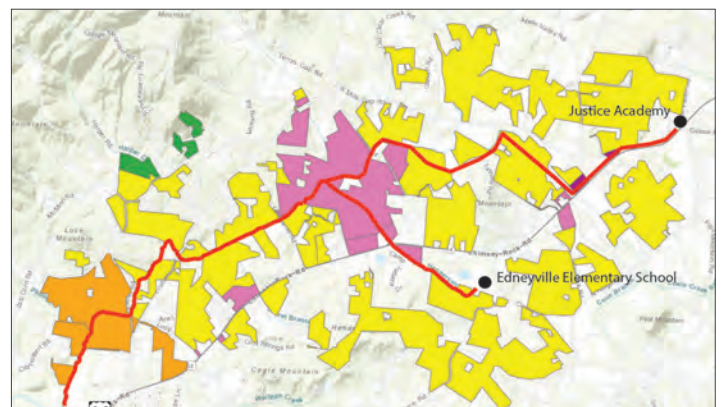
Utility Service Area Growth Analysis (2018)

Henderson County , North Carolina

Benchmark worked with Henderson County to prepare a land development study for a proposed wastewater service expansion in the fast growing northern portion of the county between Asheville and Hendersonville. The purpose of the study was to examine potential development scenarios associated with the extension of wastewater infrastructure into a sewer service basin east of Interstate 26 in the vicinity of US Highway 64. The intent of the study was to provide the county commissioners with a comparison of the potential outcomes that could be realized based on the specific type of infrastructure that is chosen to serve a planned school in the upstream portion of the basin (gravity sewer vs. a pump station and force main).

The study considered the residential land supply, development capacity, transportation concerns, public safety, and revenue generation potential in the study area. The study also demonstrated the capacity of the planning area to accommodate potential growth and determined the net residential development density necessary to

achieve a positive revenue generation outcome for the county (for both general and enterprise funds). The results of the study served as one portion of the base of information used by the county to inform its decision-making process for providing infrastructure to the new school.



Contact:
Phone:
Email:

Marcus Jones, PE, Director of Engineering
928.694.6526
majones@hendersoncountync.org



Downtown Master Plan (2018)

City of Suffolk, Virginia

Benchmark Planning was selected to update the Downtown Suffolk Initiatives Plan prepared by Urban Design Associates in 1998. The original plan was created as part of the City's comprehensive plan update process and carried out as a separate study. This updated study focused on downtown's relationship to the natural environment; local architectural character and tradition; transportation framework; market potential; and overall downtown initiatives.

During the process, an empty storefront was utilized for the design workshops that were attended by more than 175 people. In addition, the City setup pop-up cafes along downtown sidewalks to increase visibility for the workshops and encourage outdoor dining. The plan outlines key public and private investments such as a refreshed downtown streetscape, a new library, new downtown housing and several public/private partnership development opportunities.

Contact: David Hainley, AICP, Planning Director
Phone: 757.514.4060
Email: dhainley@suffolkva.us
Date: Adopted June 2018



Plan implementation status:

- New library funding included in '19 budget
- City Departments charged with implementation
- New brewery has opened in downtown
- City is updating design guidelines
- City has updated outdoor cafe policy
- City is hiring a downtown executive
- Developing historic district guidelines
- Developing a wayfinding plan



Joint Comprehensive Plan (2019)

Alleghany County / City of Covington, Virginia

Alleghany County and the City of Covington leveraged their resources and worked collaboratively in updating their Comprehensive Plans, last adopted in 2013, by having a joint planning process. In that effort, Benchmark Planning worked closely with a joint steering committee to develop a common vision, goals, and objectives for the County and the City. Benchmark helped craft tailored implementation strategies for each jurisdiction to implement the common vision. While this was a joint planning process with a common vision and set of goals, each jurisdiction received a separate plan. The joint planning process will help ensure that both the County and the City will grow together cohesively. The plans were adopted in March 2019.

Contact: Jon Lanford, County Manager
Phone: 540.863.6600
Email: jlanford@co.alleghany.va.us





Downtown Master Plan (2016 + 2020 Update)

City of Concord, North Carolina

Concord, NC (pop. 94,130) commissioned Benchmark to prepare a Downtown Urban Design Plan and final Master Plan document. Concord is on the northern border of Charlotte, NC and is home to several large tourism draws including the Charlotte Motor Speedway, zMAX Dragway, Concord Mills Mall, and Great Wolf Lodge. Concord is also the home of Carolina's Medical Center and an array of related medical facilities serving the northern Charlotte metro area. In addition, Concord continues to grow its economy with industrial and distribution facilities being developed in its International Business Park and at its burgeoning commercial airport.

Contact: Steve Osborne, AICP, Planning Director
Phone: 704.920.5132
Email: osbornes@concordnc.gov
Date: Adopted August 2016

The urban design plan that was developed is based upon significant stakeholder and focus group outreach that included a week-long design charrette. The planning process examined existing conditions, previously adopted plans, market analysis and a recent parking study. The plan recommended catalytic public infrastructure investments in the streetscape, parking and an entertainment venue, to leverage private development for "opportunity sites" in downtown. The recommended public investments included return on investment projections in order to establish a clear framework for public and private investment in the city's thriving downtown.

Plan implementation status:

- +50 new housing units created downtown
- 5 story +600 space parking deck opened
- Residential "liner" building set aside as part of deck
- Plans for a new streetscape are moving forward
- Historic Hotel Concord renovated and open
- Pedestrian crosswalk upgrades
- Redevelopment moving forward for the Old City Hall and City Hall annex properties



Rail Served Industrial Site Analysis

North Carolina Railroad Company

The North Carolina Railroad Company, founded in 1849, is a private corporation created to attract development and promote jobs through investments in the State. The NCRR freight rail line directly serves hundreds of employers and three military installations in 16 counties via its long-term agreement with Norfolk Southern. As important, the railroad's value to economic development continues to help sustain and grow our entire state's economy through connections with other railroads, intermodal terminals, and freight hubs.

In early 2015, in order to promote the importance of rail-served industries, which create jobs across the state, the NCRR began an unprecedented inventory of rail-capable properties that are available for new industry. The NCRR commissioned Benchmark and its economic development partner Greenfield Associates to study the area within one mile of the 3,250 miles of freight rail lines across the state to identify potential sites and develop an extensive qualitative and quantitative database of the identified properties for use in industrial site selection and marketing efforts.

The study identified both existing and potential rail-served industrial sites in order to provide a broad portfolio of options for various types of rail users and make this information available to the greater economic development community. The portfolio allowed NCRR to gain a sense of which sites optimize the state's ability to attract industry and stimulate investment.

Reference: Anna Lea Moore
Vice President - Economic Development
North Carolina Railroad Company

Phone: 919-954-7601

Email: annamoore@ncrr.com

Reference: Kristian Forslin, GISP, PLS
GIS and Survey Manager
North Carolina Railroad Company

Phone: 919-954-7601

Email: kristianforslin@ncrr.com

Example Projects (within last 4 years)	Project Location	Primary Role
Comprehensive Plan	Archdale, NC	Principal Firm
Zoning & Subdivision Ordinance	Onslow Co., NC	Principal Firm
Downtown Master Plan	Suffolk, VA	Principal Firm
Comprehensive Plan	Cleveland Co., NC	Principal Firm
Comprehensive Plan	Person Co/Roxboro., NC	Principal Firm
Unified Development Ordinance	Pilot Mountain, NC	Principal Firm
Comprehensive Plan	Mount Airy, NC	Principal Firm
Downtown Block Redevelopment - Phase II	Wilmington, NC	Principal Firm
Multi-Jurisdictional Land Use Plan	Sanford/Lee Co., NC	Principal Firm
Downtown Master Plan	Myrtle Beach, SC	Principal Firm
Regional Land Use Study	Wilmington, NC	Principal Firm
Regional Land Use Study	Miami Co, IN	Land Use Analysis
Discovery Place Science Master Plan	Charlotte, NC	Stakeholder Engagement
Working Lands Study	Columbia, SC	Planning & Case Studies
Neighborhood Plan	Cape Girardeau, MO	Principal Firm
Residential Land Development Study	Holly Springs, NC	Growth & Land Use Analysis
Land Development Study	Henderson Co., NC	Growth & Land Use Analysis
Long Range Planning Review	Fayetteville, NC	Principal Firm
Downtown Vision & Streetscape Plan	Pilot Mountain, NC	Principal Firm
Redevelopment Study	Greenwood, SC	Planning & Market Analysis
Indoor Recreation Facility Study	Burlington, NC	Public Engagement
Comprehensive Plan	Gatesville, TX	Principal Firm
Comprehensive Plan	Covington, VA	Principal Firm
Small Area Plan	Killeen, TX	Principal Firm
Regional Land Use Study	Fayetteville, NC	Principal Firm
Comprehensive Plan	Aiken, SC	Principal Firm
Comprehensive Plan	Bermuda Run, NC	Principal Firm
Comprehensive Plan	Mt. Pleasant, NC	Principal Firm
Comprehensive Plan	Jamestown, NC	Principal Firm
Regional Land Use Study	Sumter, SC	Land Use Analysis
Downtown Block Redevelopment - Phase I	Wilmington, NC	Planning & Market Analysis
Corridor Vision Plan	Blowing Rock, NC	Principal Firm
Downtown Raleigh Alliance Strategic Plan	Raleigh, NC	Principal Firm

D. SCOPE OF WORK

OVERVIEW

Based on our understanding of the project, we have outlined our initial thoughts on the approach we would take to prepare the Comprehensive Plan. If selected to move forward with the project, we would work with the Town to refine our approach to meet your expectations and address any unique issues or needs that would necessitate an alternate approach in terms of schedule or the components of the project.

TASK ONE - STEERING COMMITTEE WORKSHOP #1

- » Meet with town staff and steering committee (or planning board).
- » Review and finalize project schedule and overall objectives.
- » Discuss survey content and background information to be collected.

TASK TWO - CONDUCT SURVEY AND BACKGROUND RESEARCH

- » Development questionnaire and issue identification survey distributed to Town Council.
- » Digital community survey posted on the Town's website (open for 30 days).
- » Conduct background research for the Plan.

TASK THREE - STEERING COMMITTEE WORKSHOP #2

- » Review the survey and background research with the steering committee (or planning board).
- » Discuss key issues, concepts, and general development scenarios.
- » Discuss major themes to be included in the draft Plan.

TASK FOUR - STEERING COMMITTEE WORKSHOP #3

- » Develop a working draft of the Plan.
- » Review draft Plan with the steering committee (or planning board).

TASK FIVE - PUBLIC INPUT MEETING

- » Public meeting to receive input on the draft Plan and major recommendations.

TASK SIX - STEERING COMMITTEE WORKSHOP #4

- » Prepare the revised Plan.
- » Review the revised Plan with the steering committee (or planning board).
- » Finalize Plan.

TASK SEVEN - ADOPTION PROCESS

- » Planning Board formal recommendation on the Comprehensive Plan
- » Town Council public hearing and adoption of the Comprehensive Plan.



E. COST PROPOSAL & SCHEDULE

COST OVERVIEW

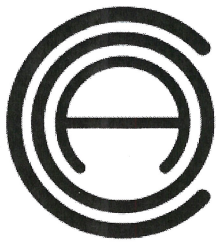
As requested, please find a full cost estimate based upon the services and deliverables as described in our technical approach. Based upon our experience with similar projects and the proposed project tasks, we estimate the total budget for this project to be **\$33,000**. The cost by project phase is listed in the table below.

TASKS	Month	COST
Task One - Steering Committee Meeting #1	July '21	\$1,000.00
Task Two - Conduct Survey and Background Research	Aug - Oct '21	\$5,350.00
Task Three - Steering Committee Meeting #2 - Review Background	Nov '21	\$3,375.00
Task Four - Steering Committee Meeting #3 - Draft Plan	Jan ' 22	\$7,725.00
Task Five - Public Input Meeting to Review Draft Plan	Feb '22	\$3,450.00
Task Six - Steering Committee Meeting #4 - Finalize Plan	Mar '22	\$9,100.00
Task Seven - Adoption Process	Apr - May '22	\$2,000.00
Deliverables - 20 color printed and bound copies + a digital copy	May '22	\$1,000.00
TOTAL		\$33,000.00

BENCHMARK

400 CLARICE AVE STE 130
CHARLOTTE, NC 28204

704.933.5990 • 800.650.3925
www.benchmarkplanning.com



COUNCIL ON AGING

IN UNION COUNTY

POST OFFICE BOX 185
MONROE, NC 28111

1401 SKYWAY DRIVE
704-292-1797

Board of Directors

June 1, 2021

Tangela Collins-Myers

Sam Goodwin

Mike Griffin

Ann Helms

Don Helms

Harris High

Sandi Ives

Debra Jackson

Harry Patel

Sanford Steelman

Ron Vilas

Mayor Rick Becker
Council Members
Town of Mineral Springs
PO Box 600
Mineral Springs, NC 28108

Dear Mayor and Council Members,

Thank you for the opportunity to be considered for support by the Town of Mineral Springs. Since we were founded 49 years ago, Council on Aging has played a crucial role of supporting our older neighbors in their effort to remain independently. For the past few decades, we have been grateful to have continued support from Mineral Springs as we work to support our aging neighbors.

As you are aware, Council on Aging is a proud "homeowner" of Mineral Springs. Our agency owns a single-family home on Potter Road that we continue to "rent" to an older woman at no cost to her.

The COVID-19 pandemic has presented our agency and community of older adults with many challenges. As you are aware, the CDC has deemed older adults as a high-risk of severe illness from COVID-19. As a result, our clientele has been extra careful and relying on our volunteers and staff to deliver necessary services and supplies to them. Two years ago, we were distributing about 35 packages of incontinence supplies a month. In 2021, we are averaging 350 packages per month, which is a 900% increase! In addition, we are distributing an abundance of durable medical equipment to help our older neighbors stay safe at home as many isolated without routine support.

One of our newest projects we began is to provide free medical alert buttons for older adults at no cost to them. To date, we have provided and installed approximately 150 systems for our older neighbors in Union County. We anticipate installing 100 more units in the next few months.

Council on Aging would like to respectfully request \$3,000 from the town of Mineral Springs to support our agency's effort to help our oldest and most vulnerable neighbors to remain independent. I have enclosed our 2019-2020 annual report about our programs this past year. Please feel welcome to reach out to me if you have any questions or if we could assist any of your residents, family members, or friends.

Gratefully yours,

Andrew Friend
Executive Director



COUNCIL ON AGING IN UNION COUNTY



2019-2020 ANNUAL REPORT

www.coaunion.org

Board

'19-'20

of Directors

Harris High - Chairman

Don Helms - Vice Chairman

Sam Goodwin - Treasurer

Ann Helms - Secretary

Tangela Collins-Myers

Barry Edelman

Constance Finch

Sandi Ives

David Nunnery

Jeremy Smith

Carnell Thornton

Ron Vilas

MISSION

Council on Aging in Union County is an independent, nonprofit agency supporting people age 60 and older in their efforts to remain healthy, active, and in control of their own lives. The agency connects clients with the services they need to live independently for as long as possible.

WHO WE SERVE

Union County residents over 60 years old and their caring and concerned family members.



SERVICES

IN HOME SERVICES

Assistance with personal care, household chores, errands, and respite at no cost.

FAMILY CAREGIVER SUPPORT

Support for those who are caring for their loved-one with memory loss.

NEXT DOOR GROUP RESPITE

Stimulating activities for those with memory loss and a break for caregivers.

OPTIONS COUNSELING

Person-centered approach to help seniors explore options and make decisions.

SHIP MEDICARE COUNSELING

Unbiased Medicare assistance to help seniors understand coverage and save money.

HOME SAFETY REPAIRS

Minor safety repairs: ramps and grab bars by volunteers to keep seniors safe.

DURABLE MEDICAL EQUIPMENT

Wheelchairs, walkers, shower chairs, etc. - given to seniors at no cost.

INCONTINENCE SUPPLIES

Disposable briefs, bed pads, etc. - given to seniors at no cost.

BY THE NUMBERS

2019-2020



13,115 HOURS
OF IN-HOME CARE



\$351,694 SAVED
BY SHIIP MEDICARE
COUNSELING



1,868 PACKAGES
INCONTINENCE SUPPLIES
GIVEN AT NO COST



3,120 PEOPLE
RECEIVING INFO, ASSISTANCE,
& OPTIONS COUNSELING



3,775 HOURS OF RESPITE
AT OUR NEXTDOOR GROUP RESPITE



428 FAMILY CAREGIVERS
RECEIVING SUPPORT & RESPITE



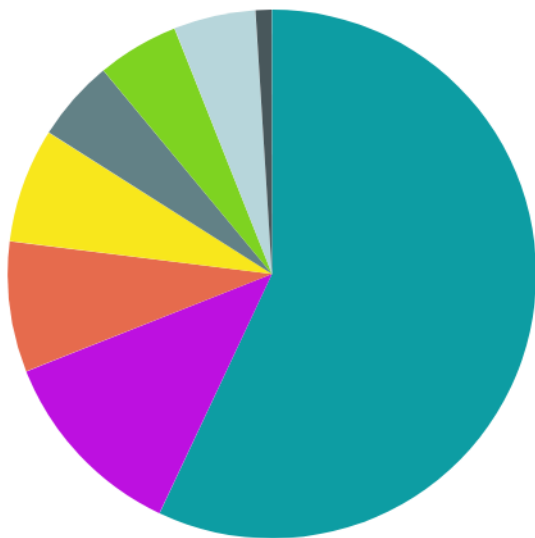
658 PIECES OF EQUIPMENT
GIVEN AT NO COST



2,004 VOLUNTEER HOURS
NEXT DOOR, SHIIP, HOME REPAIRS,
INSTRUCTORS, CLERICAL

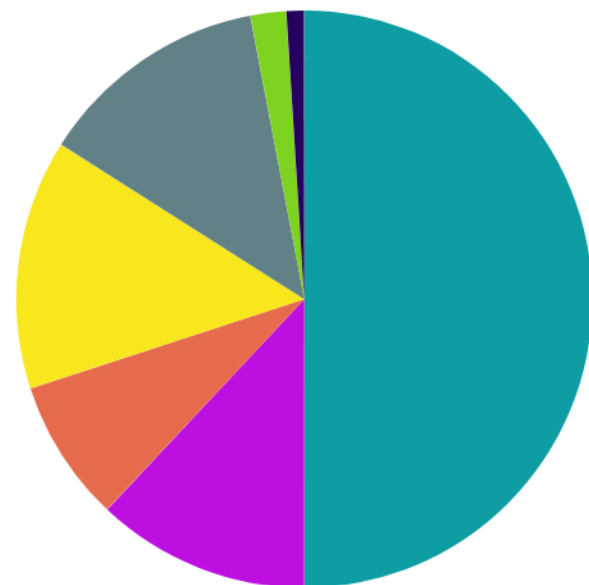
FINANCIALS

REVENUE
\$764,619



■ Federal / State (57%)
■ Private Foundations (12%) ■ Donations (8%)
■ Union County (7%) ■ Fundraising (5%)
■ Program Income (5%) ■ Inkind (5%)
■ Misc. (1%)

EXPENSES
\$758,601



■ In-Home Services (50%)
■ Options Counseling (12%)
■ Caregiver Support (8%)
■ Management/General (14%)
■ Group Respite (13%) ■ Outreach (2%)
■ Fundraising (1%)

HIGHLIGHTS & NEW INITIATIVES

2019 Nonprofit Innovation Award



Union County Chamber of Commerce

ReUnion Chorus



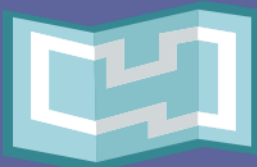
We created an inter-generational chorus of families with memory loss, music students, employees, and volunteers who gather to delight in the beauty of singing & memory.

Memory Lane Tribute Walkway



We built a Memory Lane Tribute Walkway for community members to honor their loved ones and show their support for COA.

OUR PLANS FOR NEXT YEAR: 20-21



Expanding our Reach & Impact

- Increase outreach to isolated seniors due to COVID-19.
- Expand volunteer services and grow our volunteer family.
- Build plans to renovate office to maximize space, and increase handicap accessibility & energy efficiency.
- Increase community partnerships to produce a more age-inclusive Union County.

GET IN TOUCH WITH US



704-292-1797



coa@coainion.org



PO Box 185
1401 Skyway Drive
Monroe, NC 28111



@coa_unionco_nc



@COAUnionCoNC



April 8, 2021

Mayor Rick Becker
Town of Mineral Springs
PO Box 600
Mineral Springs, NC 28108

Dear Mayor Becker:

“A pandemic within a pandemic.” That is what we face, as the uncertainty, anxiety, unemployment, economic stress, and isolation caused by the COVID-19 pandemic have set the stage for an exacerbated domestic violence, child abuse and sexual assault crisis.

Victims have been trapped with abusers in homes where tensions are high. Children are attending school remotely which removes a vital avenue for disclosure for abuse when they cannot see their teachers, guidance counselors or other trusted adults on a daily basis. The release of prisoners and the halting of arrests due to COVID-19 has removed a vital means by which domestic violence is interrupted and prevented (Source: Council on Foreign Relations), and according to the Harvard Medical School Center for Primary Care, the stress, fear and sense of helplessness associated with emergencies like the pandemic tend to increase risk factors for the perpetration of violence against women.

Due to drastic cuts in federal funding and an expected surge in clients once our state fully reopens, the support of our community will be even more critical to our ability to continue to provide services to survivors of domestic violence, sexual assault and child abuse. We realize the hardships so many of our neighbors and communities are facing, but we hope that the Town of Mineral Springs will consider providing vital financial support to Turning Point this year as it has so generously done in the past.

We are so very grateful for your consideration.

Warmest regards,

Jessie Lindberg
Executive Director

PO Box 952/Monroe, NC 28111 /704.283.7233 DV crisis line/704-283-7770 SA crisis line/704.283.9150 office

www.turningpointnc.org





June 2, 2021

Mayor Rick Becker
Town Council Members
Town of Mineral Springs
Mineral Springs, NC

Dear Mayor Becker and Council,

The Town of Mineral Springs has been a generous supporter to the community and a key partner of the American Red Cross. Mineral Springs residents have greatly benefited from your support of our programs and services at the American Red Cross. Thank you again for your past support.

The Southern Piedmont Chapter of the American Red Cross has been able to provide vital emergency Red Cross services in Mineral Springs thanks to community partners like you. This past year has been a difficult one for many and the Red Cross has not stopped supporting our communities. We supported 132 families after local disasters in the Southern Piedmont area in FY 2020. One thing we have learned is our mission never stops, not even for a pandemic. Home fires have continued, along with the need for lifesaving blood. During Covid 19, the American Red Cross, which collects 40% of our nation's blood supply, was called upon to support convalescent plasma and Covid 19 antibody testing. The need for blood and blood products was constant and several locations in Mineral Springs supported our collection efforts. Our military emergency messages are now more critical than ever. We supported military families with much needed financial assistance and helped many through a difficult time.

The mission of the American Red Cross is help people prevent, prepare for, and respond to disasters. Our non-profit volunteer-led organization provides comfort and practical aid to people suffering from home fires,

floods, and other catastrophes. We also emphasize community education and offer a wide array of classes on topics such as CPR, first aid, water safety, and emergency preparedness. Our disaster assistance is free and available to anyone, regardless of income. When a family loses everything they own to disaster, we are there to help.

We hope the Town of Mineral Springs will continue to support the American Red Cross as an important community partner and vital resource for the people of Mineral Springs. Because we are not a government agency, we rely on our community partners for funding. We respectfully request a gift of **\$1,500** to support our services. Please let me know if you have any questions. Sheila.crunkleton@redcross.org or (704) 619-4770.

Thank you for your consideration,

Sheila Crunkleton
Executive Director
125 Pedro St, Suite E (NOTE NEW ADDRESS)
Monroe, NC 28110

Vicky Brooks

From: Bret Baronak <bret@catawbalands.org>
Sent: Wednesday, June 2, 2021 4:42 PM
To: Mayor Rick Becker; Vicky Brooks
Cc: Bart Landess; Vanessa Covington
Subject: Mineral Springs Corporate Sponsorship of Carolina Thread Trail

Importance: High

Good Afternoon Mayor Becker and Ms. Brooks.

First and foremost, thank you once again for your sponsorship consideration of the Carolina Thread Trail. The Town exemplifies what it means to be a trail supporter. Thanks for all you do in partnership with us.

The following are some very profound statistics that serve to shine a light on the relationship of the Town and CTT.

Volunteer Hours for work at Mineral Springs Greenway:

- Total 2020 hours = 402.75
- Total 2021 hours = 275.5 so far
- This equates to \$17,216. 677 hours X 25.43 (national average hourly rate for in-kind services)

This is comprised of the following activities:

- Autumn Olive has almost been eradicated and is in a maintenance phase.
- Microstegium had been 75% eradicated. We will spray this fall and next and that should put it in a maintenance phase.
- Five large privet infestations have been cut and sprayed and/or pulled. All areas will be readdressed this fall and winter when the surrounding plants will be dormant there will be a reduced risk to them. There is one area that still had medium and small privets, but the large ones have been cut and sprayed.
- One very large area that has been eradicated is a very special spicebush forest. We will monitor it for any privet regrowth.
- Small Kudzu infestation is under control and in work now.
- Replanted at least 100 native plants in areas where invasive species were removed.
- Pawpaws, Dogwoods, Oaks, Buckeyes, Sweet Shrub, Spicebush, Cardinal Flower, and maybe others.

It is also worth noting that Lynn Rivera who commits so much of her time and energy to the Mineral Springs Greenway, as well as other CTT activities within our region, was recognized by CTT as **“The 2020 Saxby Chaplin Volunteer of the Year”**.

To quote one of our CTT Board Members, we are on the verge of the “Golden Age of Trails”. The next 5 years will see nearly 200 miles of trail expansion over the 15-County CTT Footprint. The demand for trails skyrocketed during the pandemic, and that demand remains at the highest levels even as we start to get beyond Covid-19.

CTT looks forward to the continued partnership with Mineral Springs and is respectfully requesting the Town’s annual allocation in the **amount of \$2500.**

Thank you so much for the work you do to support our mission.

Please contact me with any questions.

Gratefully,
Bret

Bret Baronak, Director
Carolina Thread Trail
Led by the Catawba Lands Conservancy
4530 Park Road, Suite 420
Charlotte, NC 28209
(704) 376-2556, ext 216
www.carolinathreadtrail.org