

Board of Commissioners

Mark Jones, Chair
Benita Finney, Vice Chair
Richard Poindexter
M Brent Shoaf
Terry Renegar

**County Manager**

Brian Barnett
Commissioners Room
123 S. Main Street
Mocksville, NC 27028
November 6, 2023 6:00 PM

AGENDA

**Davie County - Board of
Commissioners - Regular
Session**

1. Meeting Called to Order - Chair Jones
2. Invocation - Rev. Dr. Suzanne G Michael, Grace Church
3. Pledge of Allegiance - Veteran Larry Bass
4. Ethics & Conflicts Disclosure - County Attorney, Ed Vogler
5. Adopt Agenda - Chair Jones
6. Public Comment Period - County Attorney, Ed Vogler
 1. Public Comment Period Rules
7. Public Hearing - Zoning Map Amendment DC23-L7-1201
 1. Rezoning - Planning and Development Services Director, Johnny Easter
8. Presentations - County Manager, Brian Barnett
 1. Community Conversation Presentation - Planning and Development Services Director, Johnny Easter and County Manager, Brian Barnett
 2. September 2023 Financial Report - Assistant County Manager, Robin West
9. County Manager's Report - County Manager, Brian Barnett
10. Consent Agenda - Chair Jones
 1. Approval of Minutes - Regular Scheduled Meeting October 2, 2023
 2. Approval of Minutes - Closed Session Meeting October 2, 2023
 3. Resolution - Amend McGill Contract - Recreation and Parks Director, Paul Moore
 4. Resolution Authorizing Suit
 5. Resolutions - Exempt the process of selecting an engineer for water, sewer and solid waste projects in fiscal year 2023-2024 - Public Utilities Director, Johnny Lambert
 - S & ME
 - Hazen and Sawyer Engineering, Inc.

- Grey Engineering, Inc.

6. Fixed Asset Equipment Deletion Form - Public Utilities Director, Johnny Lambert
 7. Fixed Assets Equipment Deletion Form - 911 Communications
 8. Updated Environmental Health Fee Schedule - Health and Human Services, Suzanne Wright
 9. Bermuda Run Juniper Circle - Public Utilities Director, Johnny Lambert
 10. Budget Transfers and Amendments - Finance
 11. Board Re-Appointment, Juvenile Crime Prevention Council - JD Hartman
 12. Board Re-Appointment, Piedmont Triad Regional Workforce Development Board - Thomas Bongaerts
 13. Community Service Block Grant
 14. Memo of Agreement for Cooperative Extension Services
 15. Tax Report, Releases, Refunds
11. Old Business
 12. New Business
 13. Commissioners' Comments - Chair Jones
 14. Closed Session - Chair Jones
 1. Closed Session Pursuant to NCGS 143-318.11(a)(5) To establish, or to instruct the public body's staff or negotiating agents concerning the position to be taken by or on behalf of the public body in negotiating (i) the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease; or (ii) the amount of compensation and other material terms of an employment contract or proposed employment contract
 15. Adjourn - Chair Jones

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Karen Logan, Clerk to the Board

ITEM TYPE: Report

AGENDA SECTION: Public Comment Period - County Attorney, Ed Vogler

SUBJECT: Public Comment Period Rules

SUGGESTED ACTION:

ATTACHMENTS:
[Public Comment Period Rules 10052020.pdf](#)

PUBLIC COMMENT PERIOD RULES

Revised: October 5, 2020

1. Thirty minutes before each regular monthly meeting of the Board of County Commissions of Davie County, a sign-up sheet shall be placed on the podium in the Davie County Commissioners meeting room on the second floor of the Administrative Office Building located at 123 South Main Street, Mocksville, North Carolina for anyone wishing to speak at the regular monthly meeting during the public comment period. In the event the regular monthly meeting location has changed, the sign-up sheet shall be placed on the podium at the changed location of the meeting. There shall be no advanced sign-ups allowed before this time.
2. Each person desiring to speak during the public comment shall sign up on the sign-up sheet provided and shall state fully their name, and topic on which he or she desire to speak. If the speaker has already discussed the topic with a particular staff member before the meeting, he or she shall identify the name of the staff member.
3. All speakers will be acknowledged by the Board or its designee in the order in which their names appear on the sign-up sheet.
4. Each speaker shall be allowed a total of three (3) minutes to speak and shall immediately stop when his or her three (3) minutes are up. If the speaker does not stop at the end of his/her time period, the speaker shall be considered as interrupting or disrupting a meeting under N.C.G.S. 143-318.17 and shall be subject to the criminal laws of the State of North Carolina. In the event the speaker is speaking for an organized group, the speaker shall be allowed a total of five (5) minutes. All organized groups shall designate a single representative speaker so as to economize time and avoid duplication. In the event several individuals have signed up for the same topic and one or more individuals wish to yield their time to a subsequent speaker, then in that event, the subsequent speaker shall be considered as a speaker for an organized group and shall be allowed a total of five (5) minutes only.
5. The Board shall designate a time keeper, who shall begin timing the speaker when the speaker states his or her name and will announce "time" when the allotted time has expired. The speaker shall stop at that time.
6. The speaker shall address the Board as a whole and shall not ask for any verbal exchange back from the Board. It is not the intent of public comments to require the Board to answer any impromptu questions. There shall be no discussion between the speakers and members of the audience.
7. All comments shall be in verbal form and the speaker shall not be allowed to play any recorded or video devices during such comments. All speakers are expected to observe the decorum of the Meeting, to be respectful in their language and presentation and to refrain from the use of profanity or shouting or from making disclosures prohibited by the Personnel Act with respect to any County employee. Willfully violation of the law or interrupting or disrupting of the meeting can result in criminal charges being brought under N.C.G.S. 143-318.17.

8. All comments by a speaker shall be limited to subjects that are within the jurisdiction of the Davie County Board of County Commissioners, or pertain to matters upon which it may act.
9. Topics which would require the Board to hold a closed session , (*including but not limited to matters within the attorney-client privilege, anticipated or pending litigation, personnel, property acquisition and matters which are made confidential by law*), are not permitted as topics for public comments.
10. The speaker must make all presentations from the podium provided and shall not be allowed to physically approach the Board or staff member without the express invitation by the Chair or other designated presiding officer of the Board.
11. Any applause will be held until the end of the Public Comment Period.
12. A total of thirty (30) minutes shall be allocated by the Board for Public Comments at each regular monthly meeting of the Board of County Commissioners. Upon Motion duly made and adopted, the Board may extent the thirty (30) minute time period for any particular meeting.
13. If the time period runs out before all persons who have signed up to speak has had an opportunity to do so, then those names will be carried over to the next Public Comment Period.
14. This Policy on Public Comment shall be made available to the public 30 minutes before each regular monthly meeting and shall be placed on the County Website along with the public agenda of each regular monthly meeting at least 24 hours before each regular monthly meeting.

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Johnny Easter, Planning and Development Services

ITEM TYPE: Report

AGENDA SECTION: Public Hearing - Zoning Map Amendment DC23-L7-1201

SUBJECT: Rezoning - Planning and Development Services Director, Johnny Easter

SUGGESTED ACTION:

ATTACHMENTS:

[PUBLIC HEARING COMMENT PERIOD RULES.2021.BBV4eevdbb-21.09.14.pdf](#)

[Public Hearing.pdf](#)

[public notice Nov BOCC \(002\) \(002\).pdf](#)

[Enterprise Public Hearing.pdf](#)

PUBLIC HEARING COMMENT PERIOD RULES

1. Pursuant to Chapter 153A of the North Carolina General Statutes and Chapter 155 of the Davie County Code of Ordinances, this Board is conducting a public hearing. Due Notice of this public hearing was advertised and ran in a local newspaper with general circulation in the County as required by law.
2. Each person desiring to speak at this public hearing should come forward to the podium, state his or her full name for the Board and then comment on the proposal.
3. Speakers may only speak once per public hearing.
4. The speaker shall address the Board as a whole and shall not ask for any verbal exchange back from the Board. It is not the intent of public comments to require the Board to answer any impromptu questions. There shall be no discussion between the speakers and members of the audience.
5. All speakers are expected to observe the decorum of the Meeting, to be respectful in their language and presentation and to refrain from the use of profanity or shouting or from making disclosures prohibited by the Personnel Act with respect to any County employee. Willful violation of the law or interrupting or disrupting of the meeting can result in criminal charges being brought under N.C.G.S. 143-318.17.
6. All comments by a speaker shall be limited to subject of the public hearing.
7. The speaker must make all presentations from the podium provided and shall not be allowed to physically approach the Board or staff member without the express invitation by the Chair or other designated presiding officer of the Board.
8. In order to conduct public business in an efficient and productive manner, speakers are encouraged to avoid duplicative and repetitive comments.
9. Any applause will be held until the end of the Public Comment Period.
10. This Policy on Public Hearing Comment Period shall be made available to the public thirty (30) minutes before each Public Hearing meeting and shall be placed on the

County Website along with the public agenda of each Public Hearing at least twenty-four (24) hours before meeting.

Jesus Olmedo

STAFF REPORT TO THE BOARD
Oct. 24, 2023 Meeting Date

Planning Staff
Johnny Easter

I. REQUEST

To rezone approximately 1.27 acres from Highway Business Conditional (HB-C) to Residential Agricultural (R-A).

II. PROJECT LOCATION

The subject property is located at 5601 NC Hwy 801 South. The property is further described as Davie County Tax Parcel L70000001201.

III. PROJECT PROFILE

DAVIE COUNTY PIN: **L70000001201**

ZONING DISTRICT: **Highway Business Conditional (HB-C)**

LAND USE PLAN: Rural Residential

WATERSHED: N/A

CROSS REFERENCE FILES: N/A

APPLICANT: Jesus Olmedo

PROPERTY SIZE: 1.27 acres

CURRENT LAND USE: Not in use

PROPOSED LAND USE: **Residential Agricultural (R-A).**

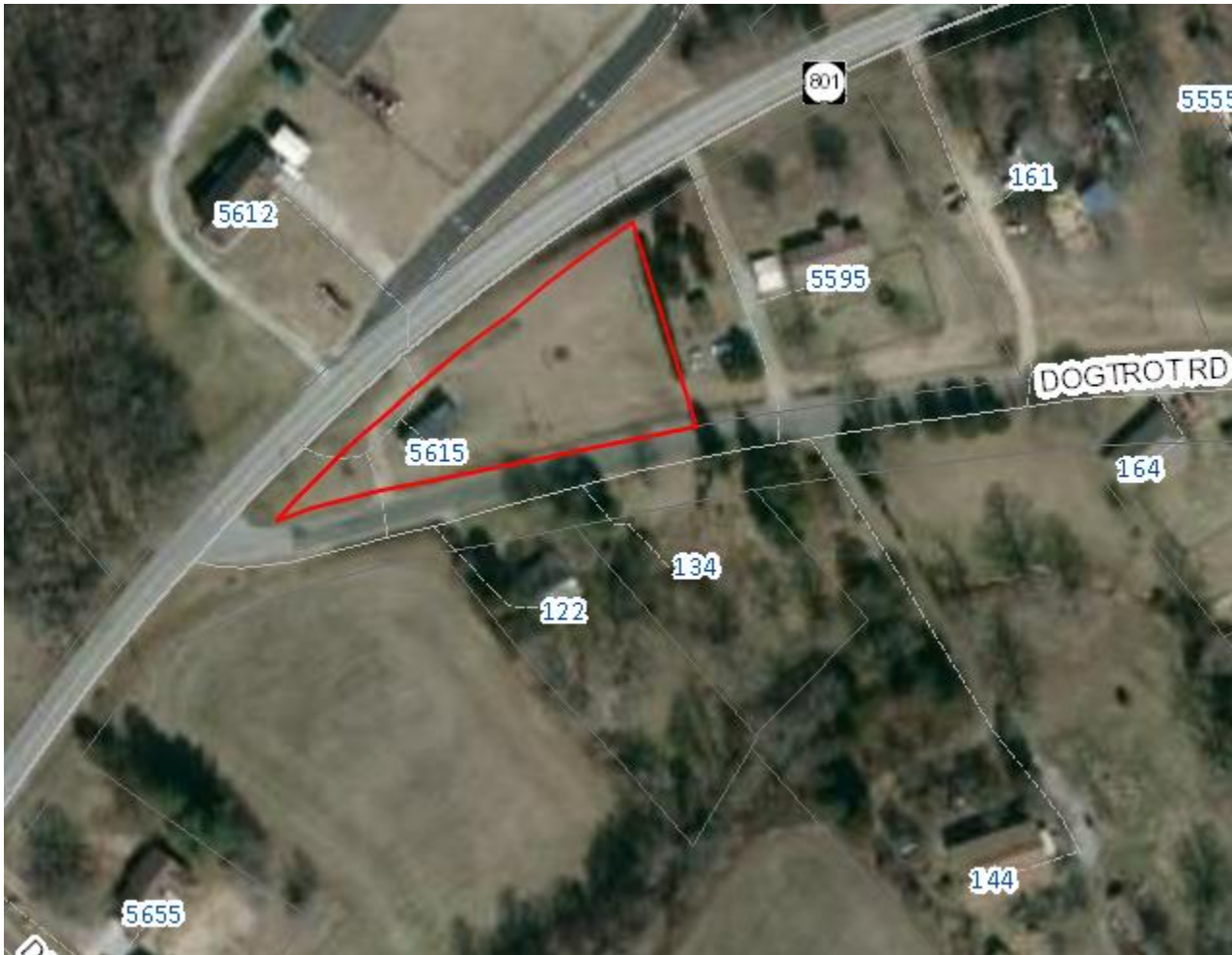
PROJECT SETTING – SURROUNDING ZONING DISTRICTS AND LAND USES

DIRECTION	LAND USE	ZONING
North	Residential	R-A
West	Residential	R-A
South	Residential	R-A
East	Residential	R-A

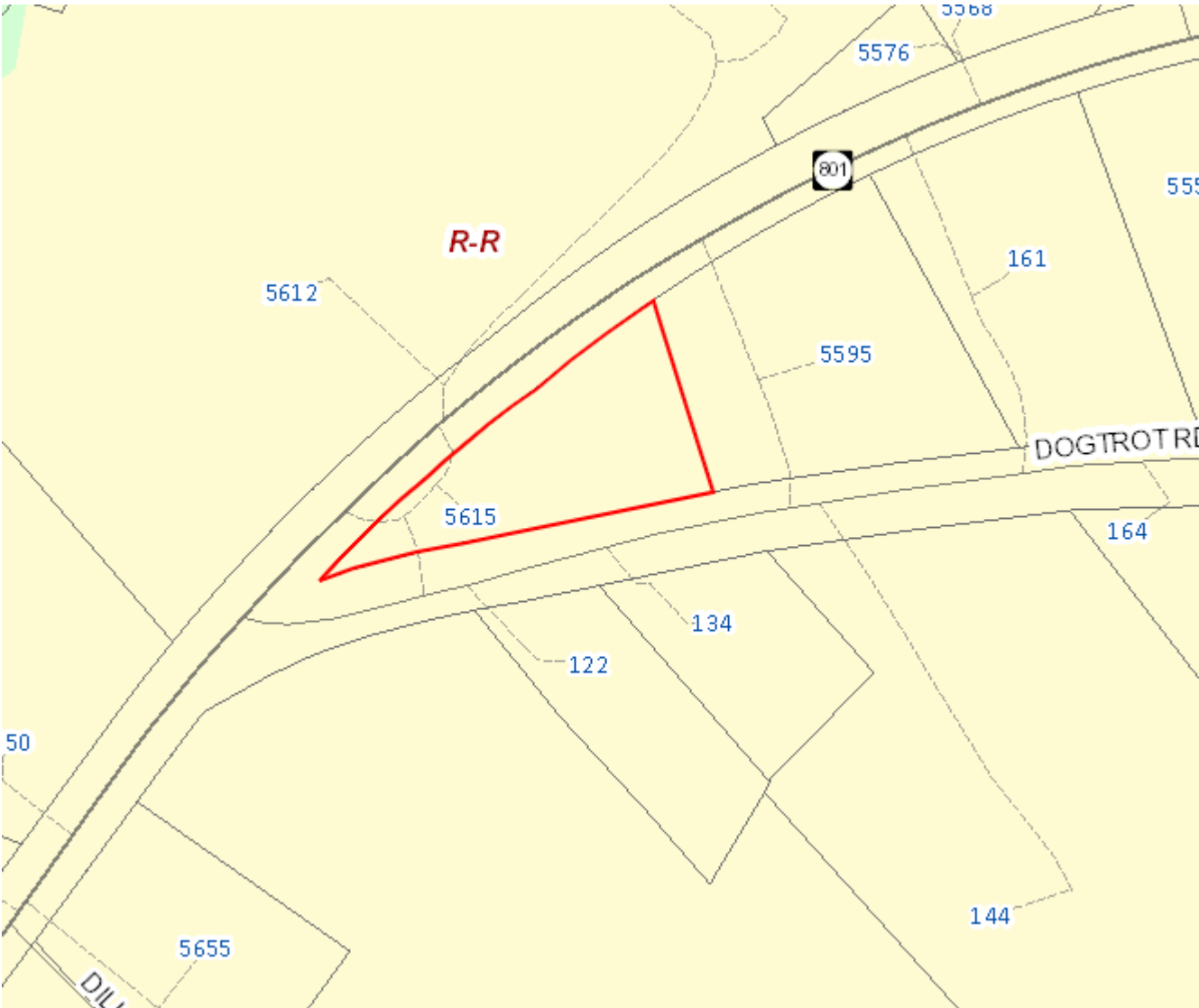
IV. Zoning Map



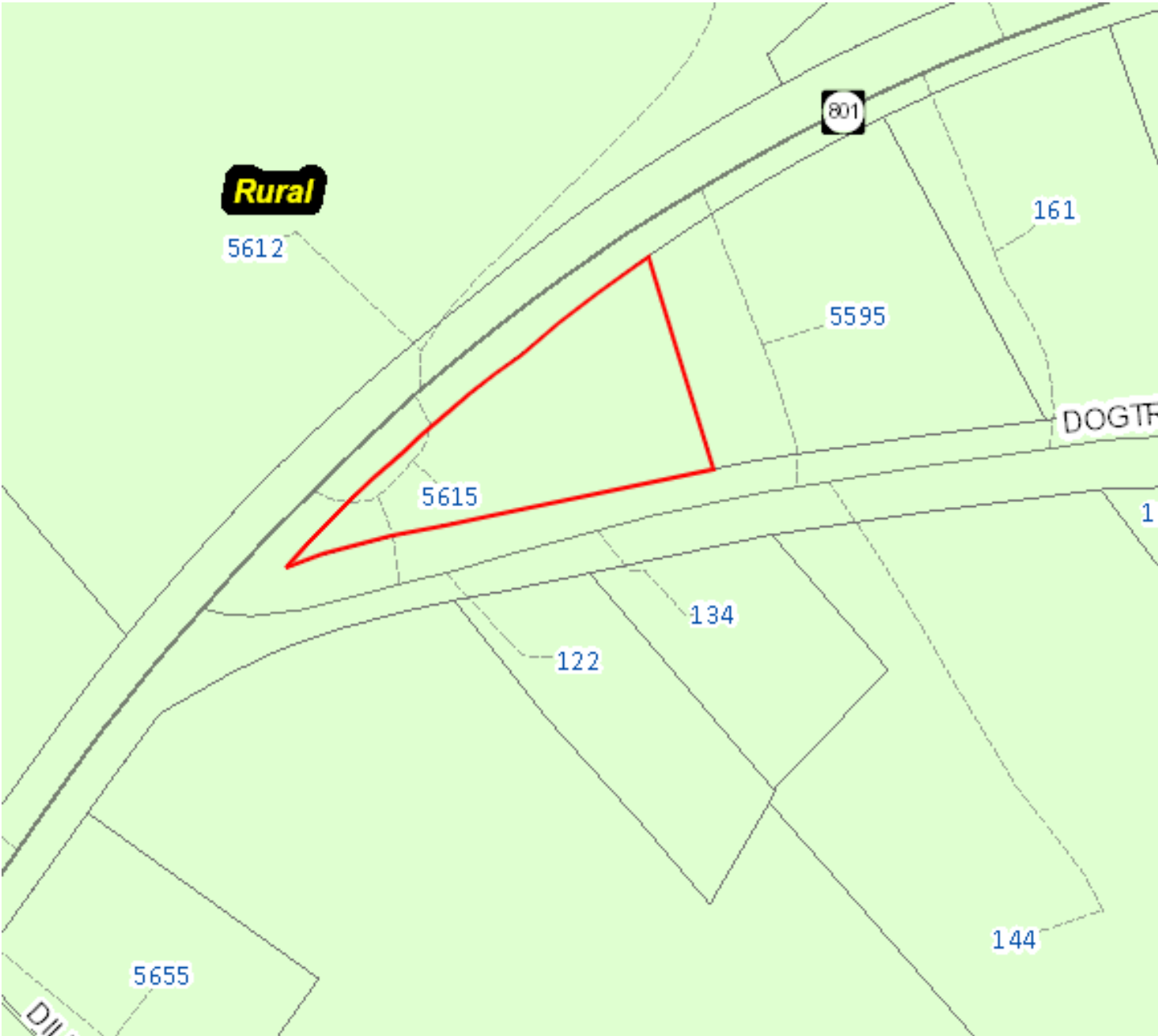
VI. 2018 Aerial Map



VII. Land Use Plan Map



VIII. Davie County Growth Enhancement Strategy Map



IX. LAND USE/ ZONING HISTORY

- **1973:** The property is originally zoned R-A.
- **1986 :** The Property as zoned HB-C (Grocery Store)

A. Proposed Zoning

The R-A Residential-Agricultural District is established to maintain a rural development pattern where Single-family housing dwellings are intermingled with agricultural uses. Two family dwellings will be allowed with the issuance of a Special Use Permit. Generally, houses will be separated from one another by open fields or wooded areas. The impact of one homeowner's activities on his or her neighbors will be less than if the property owners were located side by side in a subdivision. Consequently, the property owner may have more freedom to use his or her land as he or she sees fit. Therefore, some limited commercial uses will be permitted along with residential and agricultural uses; however, the intent is clearly to exclude commercial and industrial uses or residential subdivisions that require public services (principally water and sewer systems) before they are generally needed in the area.

B. Utilities

The site will use public water and private septic.

C. Davie County Comprehensive Plan

The property is located in an area designated as Rural Residential on the Davie County Land Use Category Map. This district defines the predominant land use will be rural activities including farming, rural commercial business, and limited residential development. This category is not intended for intense urban or suburban development, including major residential subdivisions (limited residential development may be appropriate). The rural-residential land use is intended to preserve the rural character of the County.

The Land Development Plan states:

- R. 1 Encourage the protection and rehabilitation of viable neighborhoods to insure their continued existence as a major housing source and as a reflection of the long term quality of life in Davie County.
- C.2 Discourage shallow, linear zoning districts within the corridor.
- C.4 Cluster highway oriented commercial uses at suitable points along arterial streets.
- C.14 Limit rural area commercial development to local convenience stores, farm supply stores, and generally accepted rural retailing establishments and require them to be clustered near intersections.
- M.1 Encourage mixed-use commercial development where appropriate and where compatible with surrounding residential uses.
- R.4 Encourage the continued viability of single-family homes as a major housing source while allowing and encouraging alternate forms of housing.

D. Davie County Growth Enhancement Strategy

The property is located in an area that is designated as a Rural Growth Area. This area is characterized by traditional agricultural operations, pasture land, forestry, and open space scattered non-farm residences on large tracts of land. Rural scenic vistas are a natural part of the landscape. There is normally an abundance of large, undeveloped tracts not experiencing significant residential development encroachment or pressure. There are natural, scenic, historic, or other heritage assets that contribute to the special characteristics of the area that might require special conservation and management. Land use changes in this area should be designated to protect the rural character and discourage premature public infrastructure demands by sustaining groundwater recharge capacity.

The Growth Enhancement Strategy describes policies within the rural growth area as:

Policy 5.15 The County will encourage creativity in design of residential subdivisions by allowing for greater flexibility in the design, provided that the development is not greater than that normally allowed in the district.

Policy 5.16 The County will create compact neighborhoods accessible to open space amenities and with a strong community identity.

Policy 5.18 New driveway connections will be designed in a way to minimize new locations on existing public roads.

Policy 5.19 Each lot in a subdivision planned for single-family residential development will be designed to contain well and septic tank system on the same lot as residence unless alternate system is approved through “open space” design.

X. ISSUES TO CONSIDER

The Planning Board may not consider any specific use of the property but all possible uses in the Residential Agricultural district. The Planning Board may approve or deny, or defer the request for additional consideration. The Board should consider the following in making its recommendation:

1. The property’s potential as a residential use.
2. The property’s potential as a commercial use.
3. The property’s location along a major arterial.
4. If rezoning is approved, any new structure/subdivision will go through a Project Review to ensure compliance with zoning ordinance standards such as setbacks, landscaping, buffers, parking, etc.
5. Whether the proposed reclassification is consistent with the purposes, goals, objectives, and policies of adopted plans for the area.
6. Whether the proposed reclassification is consistent with the overall character of existing development in the immediate vicinity of the subject property.
7. Applicable Zoning Ordinance Sections: The following sections of the Zoning Ordinance are applicable to this request: §155.125(B) Table of Uses; §155.141 Residential District; §155.142 Residential-Suburban District; §155.150 Neighborhood Business District §155.161(B) Procedures for Regular Districts; and, §155.250-253 Changes and Amendments.

XI. PLANNING BOARD RECOMMENDATION

The Board should consider one of the following actions:

Rezoning

☐ **Move that the following statement be adopted in support of a Motion to Approve;**

The proposed zoning amendment is consistent with the Davie County Comprehensive Plan because:

1. The property is rural residential on the 2019 plan.
2. The Comprehensive Plan policy goals to increase infill development by incentivizing reuse of existing vacant or underutilized buildings and properties.
3. The property is indicated as a rural growth area on the Growth Enhancement Strategy map within the Comprehensive Plan.

Therefore, we find this zoning amendment is reasonable and in the public interest because it supports the Comprehensive Plan policies and maps above and because:

1. The property’s location near agriculture, forestry, and open space.
2. The property’s location near similar housing types.
3. The lack of availability of public infrastructure including water and sewer.

☐ **Move that the following statement be adopted in support of a Motion to Deny,**

The proposed zoning amendment is not consistent with the Davie County Comprehensive Plan because:

1. The requested parcel is designated as a rural growth area on the Growth Enhancement Strategy Map.

Therefore, we find this zoning amendment is unreasonable and not in the public interest because it does not support the Comprehensive Plan policies and maps above and because:

1. The amendment does not protect the areas residential rural historic character.
2. The proposed amendment is incompatible with the surrounding residential structures.

☐ **Defer** the amendment for additional consideration



**NOTICE OF PUBLIC HEARING
BEFORE THE BOARD OF COUNTY COMMISSIONERS
FOR THE FOLLOWING ZONING AMENDMENTS**

NOTICE IS HEREBY GIVEN, pursuant to the requirements of Chapter 160D-602 of the General Statutes of North Carolina and Section 155.251 of the Davie County Code of Ordinances, that the Davie County Board of Commissioners will hold a **Public Hearing** in the Commissioners Meeting Room in the Administration Building located at 123 S. Main Street, Mocksville, NC on **November 6, 2023 at 6:00pm** to hear the following requests:

Zoning Map Amendment DC23-L7-1201. Jesus Olmedo has applied to rezone approximately 1.27 acres from Highway Business Conditional (HB-C) to Residential Agricultural (R-A). The subject property is located at or about 5615 NC Hwy 801 South. The property is further described as Davie County Tax Parcel L70000001201.

The public is invited to attend the hearing at which time there will be an opportunity to be heard in favor of, or in opposition to, the above items. As a result of the public hearing, substantial changes might be made in the advertised proposal, reflecting objections, debate and discussion at the hearing. Additional information is available at the Development & Facilities Services Department on weekdays between 8:30 a.m. and 5:00 p.m. or by telephone at (336) 753-6050.

Johnny Easter
Planning Department

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**Legal Notice
Affidavit Required
Publication Dates:
October 26, 2023
November 2, 2023**

DAVIE COUNTY
ENTERPRISE RECORD
Legal Invoice

REMIT TO:
SALISBURY NEWSMEDIA, LLC
P.O. BOX 4639
SALISBURY, NC 28145
704-797-4211

AMY LITZ
DAVIE COUNTY DEV. & FACILITIES SVCS.
298 E. DEPOT ST.
MOCKSVILLE, NC 27028

Acct #: 155580
Ad #: 1725629
Insert Dates: 10/26/23, 11/02/23
Tagline: DC-PH: 11.6.23
Purchase Order #
Amount Due: \$115.01

No. 1725629
NOTICE OF PUBLIC HEARING
BEFORE THE BOARD OF
COUNTY COMMISSIONERS
FOR THE FOLLOWING ZONING
AMENDMENTS

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Johnny Easter
Planning Department
Publish 10/26/23, 11/2/23

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Brian Barnett, County Manager

ITEM TYPE: Presentation

AGENDA SECTION: Presentations - County Manager, Brian Barnett

SUBJECT: Community Conversation Presentation - Planning and Development
Services Director, Johnny Easter and County Manager, Brian Barnett

SUGGESTED ACTION:

ATTACHMENTS:

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Robin West, Finance

ITEM TYPE: Report

AGENDA SECTION: Presentations - County Manager, Brian Barnett

SUBJECT: September 2023 Financial Report - Assistant County Manager, Robin West

SUGGESTED ACTION:

ATTACHMENTS:

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Karen Logan, Clerk to the Board

ITEM TYPE: Minutes

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Approval of Minutes - Regular Scheduled Meeting October 2, 2023

SUGGESTED ACTION:

ATTACHMENTS:

[October Meeting Minutes.pdf](#)

Board of Commissioners

Terry Renegar
M Brent Shoaf
Richard Poindexter
Benita Finney, Vice Chair
Mark Jones, Chair

**County Manager**

Brian Barnett
Commissioners Room
123 S. Main Street
Mocksville, NC 27028
October 2, 2023 6:00 PM

MINUTES
Davie County - Board of
Commissioners - Regular
Session

1. Meeting Called to Order - Chair Jones

Attendee Name	Title	Status
Mark Jones	Chair	Present
Benita Finney	Vice Chair	Present
Richard Poindexter		Present
M Brent Shoaf		Present
Terry Renegar		Present

2. Invocation - Joey Yokley, Regional Director of FCA / Interim Pastor, Farmington Methodist

The invocation was led by Joey Yokley.

3. Pledge of Allegiance - US Navy Veteran Mr. John Short III

The Pledge of Allegiance was led by US Navy Veteran Mr. John Short III

4. Ethics & Conflicts Disclosure - County Attorney, Ed Vogler

County Attorney, Ed Vogler stated: "Pursuant to NCGS 160A-86 and the Davie County Board of Commissioners Code of Ethics adopted December 2, 2019, I would ask each of you before you adopt the agenda if there is any actual, potential or perceived conflicts of interest with respect to any matter on the proposed agenda which will come before the Board for a vote at this meeting today. If so, please speak up and let the Board know at this time before the agenda is adopted." No Commissioner spoke. Vogler then stated, "It is therefore concluded that there are no actual, potential, or perceived conflicts of interest by any Board member."

5. Adopt Agenda - Chair Jones

Vice Chair Finney made the motion to adopt the agenda. Commissioner Renegar seconded the motion. All were in favor, and the motion passed 5-0 (Jones, Finney, Poindexter, Renegar, Shoaf)

6. Public Comment Period - County Attorney, Ed Vogler

1. Public Comment Period Rules

There were 4 individuals who signed up to speak during public comments:

- Joanne Giff, Larry Bass and Linda Mace signed up to speak as a group. Linda Mace spoke as the chairman on behalf of the Davie County Republican Party - they are here to support a resolution written and approved by the committee. This resolution is in regard to any COVID-19 mandates to oppose all global health mandates.
- Julie Whittaker - She is speaking on behalf of the the Davie County Public Library. She is speaking on the Freedom To Read Statement.

7. Presentations - County Manager, Brian Barnett

1. Water Treatment Plant Progress Update - Utilities Director, Johnny Lambert Johnny Lambert led the discussion regarding the water treatment plant progress.

The Presentation included:

- Photos of the completed rough grade for the new site
- Photos of the excavation for the UV treatment section of the main building
- Photos of 12" stone base, edge form and rebar completed installation
- Photos of trenched, installed stone base, and preassembled under slab drain piping for flocculation basins and sedimentation basins
- Photos of water main piping for Main St, Nolley Rd, Gladstone Rd and 601
- Water treatment plant financial update

2. August 2023 Financial Report - Assistant County Manager, Robin West This was regarding the August 2023 financial report that is found on page 16 and 17 on the agenda packet

8. County Manager's Report - County Manager, Brian Barnett

- County Manager, Brian Barnett gave an update on the mental health concerns that were brought to our attention at the September meeting.
- He thanked everyone who helped with the Ms. Senior Davie Pageant and congratulated Azalee Stockton of Cooleemee for the winning the title.
- He informed everyone of the Community Conversations for growth and development coming up October 5 at 6:00, October 11 at 6:00 and October 17 at 6:00. He stated we as a County are looking for any and all feedback.
- He informed everyone of the Comprehensive Aging Plan Community Conversations that consist of 4 sessions to update the master plan.
- He stated that November would be the month operation green light would be to show our support to veterans.
- He stated October would be domestic violence awareness month and it will indicated by the color purple.
- Mr. Barnett spoke on the Special Olympics yard sale and the thanked staff who helped with this along with Davie County School Staff.
- He informed everyone of the All American County Award t-shirt sale and stated that all the proceeds would go to the 4 groups that helped win the award.
- Lastly he reminded everyone about Public Safety day that will be held October 3 from

3:00PM - 8:00 PM in Downtown Mocksville.

9. Consent Agenda - Chair Jones

Vice Chair Finney made the motion to approve the consent agenda. Commissioner Renegar seconded the motion. All were in favor, and the motion passed 5-0 (Jones, Finney, Poindexter, Renegar, Shoaf)

1. Approval of Closed Session Meeting Minutes
April 6, 2023
June 19, 2023
September 5, 2023
2. Approval of Minutes - Special Called Session - August 29, 2023
3. Approval of Minutes - Regular Scheduled Meeting September 5 2023
4. Proclamation - Domestic Violence Awareness Month - October 2023
5. Proclamation - Operation Green Light for Veterans November 2023
6. Board Appointments, Juvenile Crime Prevention Council - Katie Brewer, Sophia Garza
7. Davie County Planning Board Appointment - Nick Gibietis
8. Tax Report, Releases, Refunds
9. Budget Transfers and Amendments - Finance
10. Installment Purchase Contract for Equipment
11. Resolution - Opioid Settlement Fund Spending

10. Old Business

There was no old business

11. New Business

There was no new business.

12. Commissioners' Comments - Chair Jones

Commissioner Poindexter thanked everyone for coming out tonight and he thanked all the veterans for their service.

Commissioner Shoaf thanked everyone for coming out and thanked the public commenters for sharing their comments. He spoke on the upcoming community conversations and wanted to make it known that questions can be asked prior to these meetings but he wanted to make it known that it was important for everyone to come out and give specific thoughts and not a general sentiment.

Commissioner Renegar thanked everyone for coming out and wanted to echo what Commissioner Shoaf said that we need everyone to come out to the community conversations.

Vice Chair Finney asked for everyone to come out and share input on growth and development and the aging services. She invited everyone to come to the Public Safety day along with several events coming up. She thanked Brian Barnett and Suzanne Wright for helping the individual who spoke on mental health last month.

Chair Jones thanked everyone for being here and all that everyone does for the County.

13. Closed Session - Chair Jones

At 6:43 P.M, Vice Chair Finney made the motion to enter into closed session. Commissioner Shoaf seconded the motion. All were in favor, and the motion passed 5-0 (Jones, Finney, Poindexter, Renegar, Shoaf)

1. Closed Session Pursuant to NCGS 143-318.11(a)(5) To establish, or to instruct the public body's staff or negotiating agents concerning the position to be taken by or on behalf of the public body in negotiating (i) the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease; or (ii) the amount of compensation and other material terms of an employment contract or proposed employment contract
2. Closed Session Pursuant to NCGS 143-318.11(a)(6) To consider the qualifications, competence, performance, character, fitness, conditions of appointment, or conditions of initial employment of an individual public officer or employee or prospective public officer or employee; or to hear or investigate a complaint, charge, or grievance by or against an individual public officer or employee.

14. Adjourn - Chair Jones

At 7:36 Vice Chair Finney made the motion to go back into open session. Commissioner Shoaf seconded the motion. All were in favor, and the motion passed 5-0 (Jones, Finney, Poindexter, Renegar, Shoaf)

Commissioner Poindexter made the motion to adjourn. Vice Chair Finney seconded the motion. All were in favor, and the motion passed 5-0 (Jones, Finney, Poindexter, Renegar, Shoaf)

Good evening, Commissioners,

My name is Larry Bass and I come before you this evening on behalf of the Davie County Republican Party Executive Committee to present to you our resolution regarding any potential COVID-19, or variant driven, or related mandates. This includes any attempt by local, state, and/or federal government entities to overreach their constitutional authority regarding health concerns of an individual regarding vaccines, vaccine boosters, masks, and any lockdown measures associated with businesses and schools. Furthermore, we reject the current attempt by the World Health Organization (WHO) to impose any and all global health mandates. The WHO is currently discussing the extent of regulations regarding a "pandemic" to include digital health certificates and vaccine passports. (10) We support a person's right in Davie County to choose those measures that they individually believe will keep them safe and healthy. No government, business corporation, and/or medical entity/facility has the constitutional authority to infringe on a citizen's right to choose.

WHEREAS, Pfizer's clinical data revealed 1223 deaths, 42,000 adverse cases, 158,000 adverse incidents, and approximately 1,000 side effects [2]; and

WHEREAS, government agencies, media and tech companies, and other corporations, have committed enormous fraud by claiming COVID injections are safe and effective [5]; and

WHEREAS, informed consent is considered a standard ethical practice in every facet of healthcare treatment, except for COVID-19 vaccines under emergency use authorization by the Food and Drug Administration (FDA); and

WHEREAS, we now know that COVID-19 vaccinated individuals can still become infected with and transmit COVID-19; and

WHEREAS, continued experimentation on humans and denial of informed consent are violations of the Nuremberg Code and therefore constitute crimes against humanity [7]; and
WHEREAS, many North Carolinians lost their jobs, ability to attend school, access to public places, access to loved ones, and many other freedoms because they chose not to receive the COVID-19 vaccine, and/or wear a mask, and/or as a general result of the lockdowns; and

WHEREAS, the usefulness of masks were being aggressively overstated [6]; and

WHEREAS, a recent German study reveals the harm being caused by masking as very serious with even a few minutes of wearing a surgical, cloth or N95 mask resulting in long-term damages. [6]; and

WHEREAS, small business forms 99% of the United States business entities, and bore the brunt of COVID lockdowns. [8]; and

WHEREAS, nearly 40% of small businesses have closed since COVID lockdowns first occurred in the United States. [9]; and

WHEREAS, overly restrictive measures cause needless harm, especially for the majority of generally healthy Americans who will experience moderate to no symptoms if they catch the virus.

THEREFORE, BE IT RESOLVED

1. That, in support of individual liberty, the Davie County Republican Party Executive Committee, North Carolina, supports a ban on ALL COVID and variant related vaccine and/or booster mandates, mask mandates, as well as school and/or business closures in Davie County; and
 2. That the Davie County Republican Party Executive Committee defends personal medical freedom and affirms the right of all North Carolinians to make their own healthcare decisions - related to any such mandates - without coercion.
-

Bracketed numbers above relate to the following,
REFERENCES:

1. According to Dr. Francis Boyle, author of the 1989 Bioweapons and Antiterrorism Act, this paper incriminates Fauci and many others for creating C19, an offensive bioweapon http://www.jar2.com/Files/MILITARY/US_BIOLOGICAL/nm.3985.pdf

Video of Semi Synthetic Blood Clots from Shots found by
embalmers <https://odysee.com/@AMD:0/DiedSuddenlyBloodClots:e>

Interview of Attorney Thomas Renz affirming that he has whistle blowers with
information that DOD and Intelligence Community Involved in C19 and C19

Shots <https://www.infowars.com/posts/breaking-deep-state-planning-new-bioweapon-release-ahead-of-next-who-treaty/>

Dr. Ana Mihalcea writing about nanotechnology and apparent self-assembling
technology <https://anamihalceamdphd.substack.com/p/self-assembly-microtechnology-pfizer>

F.S. 790.166 Definition of Biological Weapon

https://m.flsenate.gov/Statutes/790.166?fbclid=IwAR3jIowe32rpFdLBIHOa5jt9nsF8M6Irc5JGYEU2Sg-25XFH_16a8GRxZeQ

2. Pfizer Clinical Trial Data Post Marketing Survey

<https://phmpt.org/wp-content/uploads/2021/11/5.3.6-postmarketing-experience.pdf>

3. VAERS and VSAFE Data

<https://openvaers.com/>

<https://www.prnewswire.com/news-releases/cdcs-covid-19-vaccine-v-safe-data-released-pursuant-to-court-order-301639584.html>

4. Swedish study asserting Covid shots alter DNA

[https://www.mdpi.com/1467-](https://www.mdpi.com/1467-3045/44/3/73/htm?s=09&fbclid=IwAR3MHm_RVRc9qxfoObdk1lkr2vmaHKj32Oj)

[3045/44/3/73/htm?s=09&fbclid=IwAR3MHm_RVRc9qxfoObdk1lkr2vmaHKj32Oj](https://www.mdpi.com/1467-3045/44/3/73/htm?s=09&fbclid=IwAR3MHm_RVRc9qxfoObdk1lkr2vmaHKj32Oj)
[f8WiLEyhlILtVkoOCEwf3KEc](https://www.mdpi.com/1467-3045/44/3/73/htm?s=09&fbclid=IwAR3MHm_RVRc9qxfoObdk1lkr2vmaHKj32Oj)

5. Intercept Article documenting collusion and payments between government and big tech and big media to promote shots and censor information about potential harms

<https://theintercept.com/2022/10/31/social-media-disinformation-dhs/>

6. Health article documenting the dangers of CO2 rebreathing.

<https://vigilantnews.com/post/mask-toxicity-german-study-exposes-dangers-of-co2-re-breathing-neuron-death-learning-impairment>

7. Nuremberg Tribunals Conducted After World War II led to prosecutions and executions of doctors and others for crimes against humanity. Nuremberg Code reference located on page 11 at Resolution 2023-45; Title: Ban the Jab

<https://idgop.org/wp-content/uploads/2023/05/2023-Summer-Mtg-Submitted-Resolutions-1.pdf>

8. New York Post article explaining COVID lockdowns as a gift to big business and designed to kill small business

<https://nypost.com/2021/07/05/lockdowns-were-a-gift-to-big-biz-designed-to-kill-small-biz/>

9. Western Journal article detailing COVID lockdown impact on small businesses

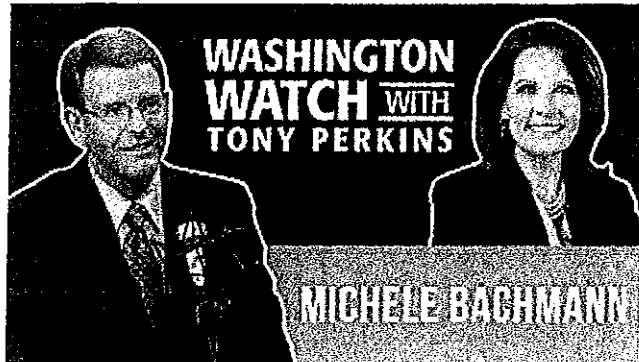
<https://www.westernjournal.com/report-details-devastating-impact-covid-19-lockdowns-small-businesses/>

10. Michelle Bachman discusses Biden's attempts to give the WHO pandemic response authority over the US

<https://www.youtube.com/watch?v=t4Tcr1Bksig>

Attachments area

Preview YouTube video Michele Bachmann discusses Biden's attempts to give the WHO pandemic response authority over the US



Regarding the Library Board of Trustee's meeting, R 9/21/23, 4pm:

While several trustees are new, and need time to learn, there seemed to be an interest from an individual to review material and challenge some because that individual may think the material inappropriate or offensive. I encourage our Commissioners and Library Trustees to reconsider the American Library Association's 70-year-old "Freedom to Read Statement."

<https://www.ala.org/advocacy/intfreedom/freedomreadstatement>

"The freedom to read is guaranteed by the Constitution. Those with faith in free people will stand firm on these constitutional guarantees of essential rights and will exercise the responsibilities that accompany these rights.

- 1. *It is in the public interest for publishers and librarians to make available the widest diversity of views and expressions, including those that are unorthodox, unpopular, or considered dangerous by the majority.***
- 2. *Publishers, librarians, and booksellers do not need to endorse every idea or presentation they make available. It would conflict with the public interest for them to establish their own political, moral, or aesthetic views as a standard for determining what should be published or circulated.***
- 3. *It is contrary to the public interest for publishers or librarians to bar access to writings on the basis of the personal history or political affiliations of the author.***
- 4. *There is no place in our society for efforts to coerce the taste of others, to confine adults to the reading matter deemed suitable for adolescents, or to inhibit the efforts of writers to achieve artistic expression.***
- 5. *It is not in the public interest to force a reader to accept the prejudgment of a label characterizing any expression or its author as subversive or dangerous.***
- 6. *It is the responsibility of publishers and librarians, as guardians of the people's freedom to read, to contest encroachments upon that freedom by individuals or groups seeking to impose their own standards or tastes upon the community at large; and by the government whenever it seeks to reduce or deny public access to public information.***
- 7. *It is the responsibility of publishers and librarians to give full meaning to the freedom to read by providing books that enrich the quality and diversity of thought and expression. By the exercise of this affirmative responsibility, they can demonstrate that the answer to a "bad" book is a good one, the answer to a "bad" idea is a good one.***

In more simple terms, it is not our prerogative to deny access to materials that may be useful to an individual. Only parents have the prerogative to disallow their own child access to materials.

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BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Karen Logan, Clerk to the Board

ITEM TYPE: Minutes

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Approval of Minutes - Closed Session Meeting October 2, 2023

SUGGESTED ACTION:

ATTACHMENTS:

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Paul Moore, Recreation & Parks

ITEM TYPE: Resolution

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Resolution - Amend McGill Contract - Recreation and Parks
Director, Paul Moore

SUGGESTED ACTION:

ATTACHMENTS:
[Resolution to Amend McGill Contract 10.20.2023.pdf](#)



Resolution Authorizing the Execution of an Amendment to Professional Services Contract between Davie County and McGill Associates, Inc.

WHEREAS, the County of Davie and McGill Associates, P.A. entered into a professional planning services contract for a Recreation and Parks Comprehensive Master Plan update on June 28, 2023; and

WHEREAS, the Parties now desire to modify the Agreement by amending the scope of the project; and

WHEREAS, the amended scope of services aligns with the goal number eight (8) and action Strategies within the current Comprehensive Parks and Recreation Master Plan (Section IX-6) adopted on or about May 1, 2013; and

WHEREAS, the County Recreation and Parks Department and Recreation and Parks Advisory Board unanimously recommends approval to amend the scope of services to include: a) preparation Lake Louise Park Master Plan, b) prepare a park master plan document, and c) prepare a PARTF (Parks and Recreation Trust Fund) grant application; and

WHEREAS, the County, Recreation and Parks Department, and Recreation and Parks Advisory Board agree that an initiative to pursue obtaining future open spaces and parklands, developed or undeveloped for the purposes enhancing recreational opportunities and Quality of Life to citizens of Davie County are essential, and

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

1. It hereby authorizes the execution of the amendment to the scope of services agreement.
2. It hereby authorized the County Manager or designated Department Director acting individually or collectively, are hereby authorized, empowered and directed to take all actions necessary or appropriate in the judgment of such officers to accomplish the purposes and intents of this Resolution; including the execution and delivery of the Amendment and all other documents, agreements, instruments, further amendments and certificates contemplated by said Amendment and/or necessary to carry out the purpose of the Agreement and the spirit of this Resolution.
3. By and with the consent of the County Attorney, County staff are hereby instructed to proceed with this undertaking and all acts and doings of officers, employees and agents of the County, whether taken prior to, on, or after the date of this Resolution, are in conformity with and in the furtherance of the purposes and intents of this Resolution as described above shall be, and the same hereby are, in all respects ratified, approved and confirmed.
4. This resolution shall become effective upon its adoption.



Davie County Government

123 S. Main Street | Mocksville, NC 27028 | 336.753.6001

DavieCountyNC.gov



Dated this 6th day of November, 2023

ATTEST

BOARD OF COMMISSIONERS FOR THE
COUNTY OF DAVIE

Karen Logan, Clerk to the Board

By: _____
Mark Jones - Chair

APPROVED AS TO FORM

Ed Vogler, County Attorney

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Ed Vogler, County Attorney

ITEM TYPE: Resolution

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Resolution Authorizing Suit

SUGGESTED ACTION:

ATTACHMENTS:
[RESOLUTION APPROVING SUIT,eev,11-6-2023.pdf](#)

RESOLUTION AUTHORIZING SUIT

Whereas, there are currently a parcel of property which Development Services have been made aware of violations of State Building Code and Davie County Code of Ordinance, namely, property located at 131 Brockland Drive, Advance, NC; and,

Whereas, Davie County Development Services has sent at least two separate Notices of Violations to the owner of the above property without any results; and,

Whereas, Davie County Development Services must now bring civil actions against the owners of the above property to enforce the State Building Code and the County Code of Ordinance; and,

Whereas, in order to enforce the above Codes, the County Attorney must have the approval of the Davie County Board of County Commissioners to proceed with a civil suit in the above matter.

NOW THEREFORE, after a Motion and Second on same, the Davie County Board of Commissioners do hereby vote to authorize and instruct the County Attorney to take all necessary civil actions to enforce the State Building Code and the Davie County Code of Ordinance as to the property located at 131 Brockland Drive, Advance, NC.

This the 6th day of November, 2023.

Davie County Board of Commissioners

By: _____

Mark Jones, Chairman of the Board

Karen Logan, Clerk to the Board

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Johnny Lambert, Public Utilities - Water/Sewer

ITEM TYPE: Resolution

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Resolutions - Exempt the process of selecting an engineer for water, sewer and solid waste projects in fiscal year 2023-2024 - Public Utilities Director, Johnny Lambert

SUGGESTED ACTION:

- S & ME
- Hazen and Sawyer Engineering, Inc.
- Grey Engineering, Inc.

ATTACHMENTS:

[Resolution-to Exempt Process of Selecting an Engineer - S&ME 23-24.pdf](#)

[Resolution-to Exempt Process of Selecting an Engineer - Hazen 23-24.pdf](#)

[Resolution-to Exempt Process of Selecting an Engineer - Grey 23-24.pdf](#)



**RESOLUTION TO EXEMPT THE PROCESS OF SELECTING AN ENGINEER FOR WATER, SEWER AND
SOLID WASTE PROJECTS IN FISCAL YEAR 2023-2024
PURSUANT TO N.C.G.S. §143-64.31 AND N.C.G.S. §143-64.32**

WHEREAS, the County of Davie has certain ongoing projects regarding repair, maintenance and upgrading of the County water, sewer and solid waste systems during Fiscal Year 2023-2024; and

WHEREAS, S&ME is knowledgeable about the ongoing plans and projects for water, sewer and solid waste system repair, maintenance and upgrading; and

WHEREAS, S&ME is duly licensed by the State of North Carolina and is qualified and competent to offer and provide engineering services for the ongoing projects described herein; and

WHEREAS, the County of Davie desires to retain S&ME to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024; and

WHEREAS, the County of Davie desires to exempt pursuant to N.C.G.S. §143-64.32, and to retain S&ME to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024.

NOW, THEREFORE, BE IT RESOLVED that the Davie County Board of Commissioners approves the exemption pursuant to N.C.G.S. §143-64.32, and authorizes the retention of S&ME to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024 pursuant to N.C.G.S. §143-64.32.

BE IT FURTHER RESOLVED that the Davie County Board of Commissioners authorizes the County Manager and the Public Utilities Director to execute such contracts as necessary to implement the provisions of this resolution, and authorizes the County Manager and Public Utilities Director to execute the same.

Adopted this ____ day of _____, 2023.

Mark Jones, Chairman
Davie County Board of Commissioners

Attest:

Karen Logan
Clerk to the Board



Davie County Government

123 S. Main Street | Mocksville, NC 27028 | 336.753.6001

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RESOLUTION TO EXEMPT THE PROCESS OF SELECTING AN ENGINEER FOR WATER, SEWER AND SOLID WASTE PROJECTS IN FISCAL YEAR 2023-2024

PURSUANT TO N.C.G.S. §143-64.31 AND N.C.G.S. §143-64.32

WHEREAS, the County of Davie has certain ongoing projects regarding repair, maintenance and upgrading of the County water, sewer and solid waste systems during Fiscal Year 2023-2024; and

WHEREAS, Hazen & Sawyer Engineering, Inc., is knowledgeable about the ongoing plans and projects for water, sewer and solid waste system repair, maintenance and upgrading; and

WHEREAS, Hazen & Sawyer Engineering, Inc., is duly licensed by the State of North Carolina and is qualified and competent to offer and provide engineering services for the ongoing projects described herein; and

WHEREAS, the County of Davie desires to retain Hazen & Sawyer Engineering, Inc., to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024; and

WHEREAS, the County of Davie desires to exempt pursuant to N.C.G.S. §143-64.32, and to retain Hazen & Sawyer Engineering, Inc., to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024.

NOW, THEREFORE, BE IT RESOLVED that the Davie County Board of Commissioners approves the exemption pursuant to N.C.G.S. §143-64.32, and authorizes the retention of Hazen & Sawyer Engineering, Inc., to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024 pursuant to N.C.G.S. §143-64.32.

BE IT FURTHER RESOLVED that the Davie County Board of Commissioners authorizes the County Manager and the Public Utilities Director to execute such contracts as necessary to implement the provisions of this resolution, and authorizes the County Manager and Public Utilities Director to execute the same.

Adopted this ____ day of _____, 2023.

Mark Jones, Chairman
Davie County Board of Commissioners

Attest:

Karen Logan
Clerk to the Board



**RESOLUTION TO EXEMPT THE PROCESS OF SELECTING AN ENGINEER FOR WATER, SEWER AND
SOLID WASTE PROJECTS IN FISCAL YEAR 2023-2024
PURSUANT TO N.C.G.S. §143-64.31 AND N.C.G.S. §143-64.32**

WHEREAS, the County of Davie has certain ongoing projects regarding repair, maintenance and upgrading of the County water, sewer and solid waste systems during Fiscal Year 2023-2024; and

WHEREAS, Grey Engineering, Inc., is knowledgeable about the ongoing plans and projects for water, sewer and solid waste system repair, maintenance and upgrading; and

WHEREAS, Grey Engineering, Inc., is duly licensed by the State of North Carolina and is qualified and competent to offer and provide engineering services for the ongoing projects described herein; and

WHEREAS, the County of Davie desires to retain Grey Engineering, Inc., to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024; and

WHEREAS, the County of Davie desires to exempt pursuant to N.C.G.S. §143-64.32, and to retain Grey Engineering, Inc., to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024.

NOW, THEREFORE, BE IT RESOLVED that the Davie County Board of Commissioners approves the exemption pursuant to N.C.G.S. §143-64.32, and authorizes the retention of Grey Engineering, Inc., to perform engineering services related to water, sewer and solid waste system repair, maintenance and upgrading in Fiscal Year 2023-2024 pursuant to N.C.G.S. §143-64.32.

BE IT FURTHER RESOLVED that the Davie County Board of Commissioners authorizes the County Manager and the Public Utilities Director to execute such contracts as necessary to implement the provisions of this resolution, and authorizes the County Manager and Public Utilities Director to execute the same.

Adopted this ____ day of _____, 2023.

Mark Jones, Chairman
Davie County Board of Commissioners

Attest:

Karen Logan
Clerk to the Board

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Johnny Lambert, Public Utilities - Water/Sewer

ITEM TYPE: Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Fixed Asset Equipment Deletion Form - Public Utilities Director,
Johnny Lambert

SUGGESTED ACTION:

ATTACHMENTS:

[Fixed Asset Deletion Form - Lambert.pdf](#)

DAVIE COUNTY FIXED ASSETS

EQUIPMENT DELETION FORM

Department Name Public Utilities

Date 10/15/2023

[illegible]

The above listed items have been approved for deletion from this department's equipment list.

Requested By:

(Department Head)

Approved By:

(Davie County Manager)

Date:

Finance Office Use Only

Date Posted:

Posted by:

(Rev.3/2000)

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Rodney Pierce, Communications

ITEM TYPE: Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Fixed Assets Equipment Deletion Form - 911 Communications

SUGGESTED ACTION:

ATTACHMENTS:
[7789-9747 Yukon Deletion PDF](#)

DAVIE COUNTY FIXED ASSETS

EQUIPMENT DELETION FORM

Department Name 911 CommunicationsDate 10/19/2023

Department Number	Asset Tag Number	Item Description	Reason for Deletion	Deletion Amount
2610	7789/9474	2007 GMC Yukon XL 1GKFK16307J243862	Obsolete	\$ 27,595.00

The above listed items have been approved for deletion from this department's equipment list.

Requested By: Rodney Pierce

Finance Office Use Only

Approved By:

(Department Head)

DocuSigned by:



(David County Asst. Manager)

Date:

10/20/2023

Date Posted: _____

Posted by: _____

(Rev.3/2000)

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BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Suzanne Wright, HHS-Health

ITEM TYPE: Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Updated Environmental Health Fee Schedule - Health and Human Services, Suzanne Wright

SUGGESTED ACTION:

ATTACHMENTS:

[DAVIE COUNTY ENVIRONMENTAL HEALTH FEE SCHEDULE 2023 Final Draft.pdf](#)

[Environmental Health Fee Adjustment 2023 narrative.pdf](#)

DAVIE COUNTY ENVIRONMENTAL HEALTH FEE SCHEDULE

ONSITE WASTE WATER PROGRAM	
Site Evaluations - Improvement Permit (IP):	
100-360 GPD (2-3 bedrooms)	\$250
361-600 GPD (4-5 bedrooms)	\$350
601-2999 GPD (6+ bedrooms)	\$500
3000+ GPD	\$750
Construction Authorization (CA):	
100-360 GPD (2-3 bedrooms)	\$250
361-600 GPD (4-5 bedrooms)	\$350
601-2999 GPD (6+ bedrooms)	\$500
3000+ GPD	\$750
Septic Repair Evaluation & CA	\$100
CA with Pump (added to CA above)	\$150
Subdivision Fee (5+ lots, added to IP above) fee per lot	\$100
Revisit	\$100
Permit Redraw	\$75
System Layout	\$100
Waste Water Certification/ Health Department Release	\$150
335(a2) Permit Package IP only – Full IP fee above	100%
335(a2) Permit Package IP/CA (40% of total IP and CA fee)	40%
EOP/AOWE Notice of Intent to Construct	\$35
PRIVATE WELL WATER PROGRAM	
New Well Construction Application	\$350
New Well Water Sampling	\$150
Well Repair Application	\$100
Well Abandonment Certification Application	\$100
Revisit	\$100
Water Samples:	
Full Well Kit (Bacteria, Chemical/Inorganic, Nitrate/Nitrite)	\$150
Bacteria	\$75
Chemical/ Inorganic	\$100
Nitrate/ Nitrite	\$75
Other (pesticides, etc. from state lab)	\$125
FOOD SERVICE PROGRAM	
Food Service Plan Review	\$250
Temporary Food Event Permit	\$75
Limited Food Service Permit	\$75
SWIMMING POOL PROGRAM	
Swimming Pool Plan Review	\$300
Swimming Pool Permit (Seasonal) (Pool, Wading Pool, Spa, etc.)	\$150
Swimming Pool Permit (Year-round) (Pool, Wading Pool, Spa, etc.)	\$200
Revisit	\$100
TATTOOING PROGRAM	
Tattoo Artist (Annual Fee)	\$250
Temporary Tattoo Fee (3 day)	\$100
MOBILE HOME PARK INSPECTIONS	
MHP with OSWW systems	\$100
MHP without OSWW systems	\$50
MHP Well Sample	\$100
SERVSAFE CLASS	
ServSafe Class (per person)	\$120

Environmental Health Fee Adjustment 2023

On July 10, 2023, North Carolina signed and implemented Session Law 2023-90. There are multiple sections within this Session Law that affect the NC on-site water protection branch and on-site programs of Environmental Health within Local Health Departments (LHD). DCHHS later received a Position Statement document from NCDHHS On-site Protection Branch that would give guidance on implementing the Session Law (SL) provisions.

- First impact is associated with private industry permitting option packages. These permitting packages are pursuant to G.S 130A-335, which allows a Licensed Soil Scientist, Authorized Onsite Wastewater Evaluator, Licensed Geologist, or Professional Engineer to submit packages to a LHD to initiate a septic permit. SL2023-90 shortens the length of time that a LHD have to review and complete from 10 days to 5 days, and more importantly caps the possible fee charge to 40% of normal fee for the permit.
- Second impact is associated with Engineer Option Permit and AOWE Option Permit now require a Notice of Intent to Construct to be submitted to the LHD. This covers the Engineer of AOWE to conduct a final inspection for an Operations Permit. A \$35.00 filing fee is a new set fee determined and set by the state.
- Third impact, Section 8.1 adds new language that disallows local governments to withhold a building permit on a project when there is no increase in design daily flow or wastewater strength to an existing wastewater system, if an owner submits an on-site wastewater existing system inspection exemption affidavit. This affidavit must be created and distributed by the Building Code Council by October 1, 2023 (we have not seen a copy of the affidavit yet). Removal of the hold, removes the Waste Water Certification that Environmental Health has been conducting for any improvement to a site that would change structure footprint and require a building permit. This removes approximately 200 applications and associated fees per year.

The state has also gotten final approval, through House Bill 627, to proceed with the new 18E Wastewater Rules. Implementation will begin Jan 1, 2024. These new Rules will replace the outdated 15A NCAC 18A .1900 rules, which originally went into effect July 1982. Science and technology have made a huge leap forward in the 40+ years that the .1900 rules have been in place and this will be more evident by the increased work and design aspects that Environmental Health staff will take on daily. With the new 18E rules, the LHD will be responsible for all designs for a septic pump, pressure manifold, control panel, and any other component that will be required with a pump system. The design components have been taken care of by private contractor or private industry up until this point. All pump systems now will require a pressure manifold, which is a new requirement by the state. Septic system types have diversified and become extremely complex, along with the developing areas of Davie County requiring more complex design thought and system types. Moving forward the time commitment from staff on each site will increase.

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BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Johnny Lambert, Public Utilities - Water/Sewer

ITEM TYPE: Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Bermuda Run Juniper Circle - Public Utilities Director, Johnny Lambert

SUGGESTED ACTION:

ATTACHMENTS:

[Juniper Circle Pump Station Interlocal Agreement with Davie County.pdf](#)
[Bermuda Run Approved Version Juniper Circle.pdf](#)

Juniper Circle Pump Station Interlocal Agreement with Davie County

The Town of Bermuda Run wishes to transfer ownership to of the assets associated with the Juniper Circle Pumping Station to receive the funding in S.L 2022-047. The interlocal provides that Davie County will compensate and reimburse the Town \$1,800,000.00 for the rights and ownership of the asset, while allowing the Town to lease the property for all operations, upgrades and maintenance of the facility.

JUNIPER CIRCLE PUMP STATION INTERLOCAL AGREEMENT

THIS INTERLOCAL AGREEMENT, dated as of [DATE] (this "*Agreement*"), and entered into by and between the **DAVIE COUNTY, NORTH CAROLINA** ("*Davie County*") and the **TOWN OF BERMUDA RUN, NORTH CAROLINA** ("*Bermuda Run*").

WITNESSETH:

WHEREAS, Davie County and Bermuda Run are authorized under Article 20 of Chapter 160A of the North Carolina General Statutes (the "*Interlocal Cooperation Act*") to enter into interlocal agreements with each other to execute any undertaking; and

WHEREAS, Davie County and Bermuda Run have determined to execute a transfer of ownership of the assets associated with Bermuda Run's Juniper Circle Pump Station; and

WHEREAS, the transfer of the Juniper Circle Pump Station will facilitate a regional approach to wastewater treatment and enable Bermuda Run to decommission the Town's wastewater treatment facility and transfer responsibility for wastewater treatment to Davie County as established in previous Agreements; and

WHEREAS, Davie County will assume ownership of the Juniper Circle Pump Station and the associated responsibility for the operations and maintenance of the Juniper Circle Pump Station. From the date of execution of this agreement, Davie County will be responsible for ensuring the Juniper Circle Pump Station is operated and maintained in accordance with County and wastewater industry standards, ensuring that the Town's wastewater is transferred into the County's Eastern Davie Wastewater System for treatment; and

WHEREAS, Davie County agrees to compensate Bermuda Run for the rights to acquire the assets associated with the Juniper Circle Pump Station in the amount of \$1,800,000 (One million, eight hundred thousand dollars); and

WHEREAS, the funds that will be used by Davie County to acquire the Juniper Circle Pump Station assets will come directly from an American Rescue Plan Act (ARPA) grant that was awarded by the State of North Carolina to Davie County as part of S.L. 2022-074 and will be associated with no additional costs to current or future Davie County wastewater system customers through adjustments to user charges for service; and

WHEREAS, Bermuda Run maintains a wastewater collection system to convey wastewater from the Town's wastewater service area to the Juniper Circle Pump Station. The Town and County intend to eventually transfer responsibility for all Town owned wastewater assets to the County. Until the point where the County assumes responsibility for all Town wastewater assets, or another time mutually agreed upon by both parties, the County and Town agree to lease operational and maintenance responsibility to the Town for a price of \$1.00 (one dollar) per annum paid by Bermuda Run to Davie County. This lease will make Bermuda Run financially responsible for all Juniper Circle Pump Stations operational and maintenance costs until a mutually agreed upon termination of the lease by both parties; and

WHEREAS, This Agreement shall be effective on the date hereof; and

WHEREAS, all acts, conditions and things required by law to exist, to have happened and to have been performed precedent to and in connection with the execution and entering into of this Agreement do exist, have happened and have been performed in regular and due time, form and manner as required by law, and the parties hereto are now duly authorized to execute and enter into this Agreement;

NOW, THEREFORE, in consideration of the promises and of the mutual agreements and covenants contained in this Agreement and for other valuable consideration, the parties to this Agreement do hereby agree,

1. The Town of Bermuda Run does hereby transfer ownership of all assets associated with the Bermuda Run Juniper Creek Pump Station to Davie County, North Carolina.
2. Davie County, (upon receipt of funds from the State of North Carolina grant as set forth in S.L. 2022-074 from the American Rescue Plan Act), will pay to the Town of Bermuda Run the sum of \$1,800,000.00. This agreement is contingent upon the payment of these funds from the State of North Carolina as a condition precedent to the activation of this Agreement.
3. Davie County, North Carolina shall lease to the Town of Bermuda Run the Juniper Creek Pump Station for the sum of one (\$1.00) dollar per annum for such time until the parties hereto agree to any transfer of the entire wastewater collection system currently owned and operated by the Town of Bermuda Run to Davie County, North Carolina. Such agreement to transfer shall be in writing and executed by the parties hereto.
4. The Town of Bermuda Run shall be completely responsible, financially and otherwise, for all operational, maintenance and any replacement cost of the Juniper Creek Pump Station and any parts therein so long as this lease is in existence. This lease provision shall remain in existence until such time as the parties agree in writing to a complete transfer of the Town of Bermuda Run's Wastewater Collection System to Davie County, North Carolina.
5. Until such time as there is a transfer of the entire wastewater collection system currently owned and operated by the Town of Bermuda Run to Davie County, North Carolina, the Town of Bermuda Run shall discharge its wastewater into the Juniper Creek Pump Station owned by the County and shall be responsible for ensuring the Juniper Creek Pump Station is operating and maintained in accordance with Davie County's and the state of North Carolina's wastewater industry standards for transfer into Davie County Eastern Davie Wastewater System.
6. The Town of Bermuda Run shall pay to Davie County, North Carolina bulk rate fees for the transfer of the Town of Bermuda Run wastewater flowing through the Juniper Creek Pump Station as previously agreed upon.
7. The Town of Bermuda Run shall indemnify and hold Davie County, North Carolina harmless from any damages sustained by the County or any third party or entity as a result of the Town of Bermuda Run's failure to perform under paragraphs number four (4) and five (5) above.
8. This Agreement shall only be modified if in writing and executed by the parties hereto in the same form and style as this Agreement.

IN WITNESS WHEREOF, the parties to this Agreement have executed and attested this Agreement by their duly authorized officers as of the day and year first written above.

DAVIE COUNTY, NORTH CAROLINA

[SEAL]

By: _____
County Manager

Attest:

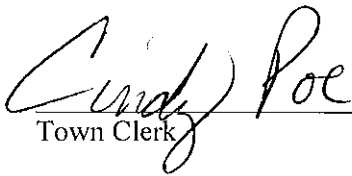
County Clerk

TOWN OF BERMUDA RUN, NORTH CAROLINA

[SEAL]

By: 
Town Manager

Attest:


Town Clerk

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Robin West, Finance

ITEM TYPE: Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Budget Transfers and Amendments - Finance

SUGGESTED ACTION:

ATTACHMENTS:

[November 2023 Budget Amendment Notification.pdf](#)
[November 2023 Budget Amendment Package.pdf](#)

DAVIE COUNTY FINANCE – BUDGET AMENDMENT REQUEST NOTIFICATION

Department:

E-911

Date of Request:

10/17/2023

FY Budget:

2024

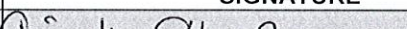
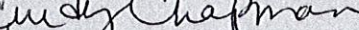
[illegible]

Net Effect to Budget:

20,000.00

Department Justification: (Please provide detailed explanation)

This amendment is to use \$20,000 of E-911 fund balance to cover added expenses for two UPS Battery replacements and for maintenance contract for E-911 Motorola dispatch consoles. Future E-911 funding can be reduced if fund balance is not used.

APPROVAL	SIGNATURE	DATE
Strategy & Budget Director		10/19/23
Assistant County Manager/CFO		10/19/23
County Manager		10/19/23
Board of County Commissioners	Meeting Date <u>11/6/2023</u> Reference # <u>911-1</u>	

Budget Amendment Request Notification Forms must be completed and approved by officials above prior to inclusion on BoCC meeting agenda for items listed below.

- 1) Amendments \$100,000 or greater
- 2) Amendments for acquisition of land or facilities
- 3) Amendments including Fund Balance Appropriations

Budget Amendments for November 6, 2023

Staff requests consideration and approval of the following budget amendments:

911-1	20,000	Use E911 fund balance to purchase two UPS battery replacements and for maintenance contract for dispatch
COOP 1	3,889	Accept Farmland Preservation grant for Cooperative Extension to purchase VAD signs
DCSOA 38	35,603	Accept Insurance Settlement funds to be used for Sheriff vehicle repairs
EMS 11	20	Accept EMS revenue from CPR classes
FIN 17	4,000	Accept Homeland Security grant to purchase fuel caddy for Emergency Management
SRCTR 11	40,000	Accept ARPA – Senior Center Expansion grant to support Wellness Coordinator and advertising



Finance Department

123 S. Main Street | Mocksville, NC 27028 | 336.753.6020

DavieCountyNC.gov



BUDGET AMENDMENTS FOR NOVEMBER 6, 2023

10/30/2023 09:48
cschapman

| COUNTY OF DAVIE
| BUDGET AMENDMENTS JOURNAL ENTRY PROOF

| P 1.
| bgamdent:

LN	ORG ACCOUNT	OBJECT	PROJ	ORG DESCRIPTION	ACCOUNT DESCRIPTION LINE DESCRIPTION	EFF DATE	PREV BUDGET	BUDGET CHANGE	AMENDED BUDGET	ERR

YEAR-PER	JOURNAL	EFF-DATE	REF 1	REF 2	SRC JNL-DESC	ENTITY AMEND				
2024	04	40021	10/31/2023	EMS 11	BUA EMS 11	1 2				
1	42510	480034		EMERGENCY MEDICAL SERVICES	MISCELLANEOUS REVENUE EMS		-707.00	-20.00	-727.00	
	010	-4200-2510-001-001-480034-			CPR Cards		10/31/2023			
2	52510	540100		EMERGENCY MEDICAL SERVICES	EDUCATION & TRAINING		25,307.00	20.00	25,327.00	
	010	-5200-2510-001-001-540100-			CPR Cards		10/31/2023			
** JOURNAL TOTAL								0.00		
YEAR-PER	JOURNAL	EFF-DATE	REF 1	REF 2	SRC JNL-DESC	ENTITY AMEND				
2024	04	40037	10/09/2023	FIN 17	BUA FIN 17	1 2				
1	42710	430162		FIRE MARSHAL	HOMELAND SECURITY GRANT		.00	-4,000.00	-4,000.00	
	010	-4200-2710-001-001-430162-			EM MGT - FUEL CADDY GRANT		10/09/2023			
2	52710	581671		FIRE MARSHAL	HOMELAND SECURITY GRANT FUNDS		.00	4,000.00	4,000.00	
	010	-5200-2710-001-001-581671-			EM MGT - FUEL CADDY GRANT		10/09/2023			
** JOURNAL TOTAL								0.00		
YEAR-PER	JOURNAL	EFF-DATE	REF 1	REF 2	SRC JNL-DESC	ENTITY AMEND				
2024	04	40065	10/17/2023		BUA 911-1	1 2				
1	42620	490016		E911	FUND BALANCE APPROPRIATED		.00	-20,000.00	-20,000.00	
	210	-4200-2620-001-001-490016-			INC FOR MAINTENANCE CONTRACTS		10/17/2023			
2	52620	540240		E911	911-LEASED PHONE LINES		15,000.00	-5,000.00	10,000.00	
	210	-5200-2620-001-001-540240-			INC FOR MAINTENANCE CONTRACTS		10/17/2023			
3	52620	541540		E911	COMPUTER SERVICES		78,000.00	25,000.00	103,000.00	
	210	-5200-2620-001-001-541540-			INC FOR MAINTENANCE CONTRACTS		10/17/2023			
** JOURNAL TOTAL								0.00		
YEAR-PER	JOURNAL	EFF-DATE	REF 1	REF 2	SRC JNL-DESC	ENTITY AMEND				
2024	04	40070	10/18/2023		BUA DCSOA38	1 2				
1	41910	490012		GENERAL GOVERNMENT REVENUE	INSURANCE SETTLEMENT		-18,135.00	-35,603.00	-53,738.00	
	010	-4100-1910-001-001-490012-					10/18/2023			
2	52110	540450		SHERIFF'S DEPARTMENT	PURCHASED SERVICES		240,000.00	35,603.00	275,603.00	
	010	-5200-2110-001-001-540450-			INSURANCE SETTLEMENT CAR WRECK		10/18/2023			
** JOURNAL TOTAL								0.00		



Finance Department

123 S. Main Street | Mocksville, NC 27028 | 336.753.6020

DavieCountyNC.gov



BUDGET AMENDMENTS FOR NOVEMBER 6, 2023

10/30/2023 09:48
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COUNTY OF DAVIE
BUDGET AMENDMENTS JOURNAL ENTRY PROOF

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LN	ORG ACCOUNT	OBJECT	PROJ	ORG DESCRIPTION	ACCOUNT DESCRIPTION LINE DESCRIPTION	EFF DATE	PREV BUDGET	BUDGET CHANGE	AMENDED BUDGET	ERR

YEAR-PER	JOURNAL	EFF-DATE	REF 1	REF 2	SRC JNL-DESC	ENTITY AMEND				
2024	04	40081	10/20/2023	Coop1	BUA Coop1	1 2				
1	44210403	480099			VOLUNTARY AGRICULTURAL DIST	FARMLAND PRESERVATION GRANT	.00	-3,889.00	-3,889.00	
	010 -4400-4210-403-001-480099-					Accept VAD signs grant	10/20/2023			
2	54210403	550203			VOLUNTARY AGRICULTURAL DIST	VAD - ROAD SIGNS	499.00	3,889.00	4,388.00	
	010 -5400-4210-403-001-550203-					Utilize VAD signs grant	10/20/2023			
** JOURNAL TOTAL								0.00		
YEAR-PER	JOURNAL	EFF-DATE	REF 1	REF 2	SRC JNL-DESC	ENTITY AMEND				
2024	04	40123	10/26/2023	SRCT11	BUA SRCT11	1 2				
1	45210202	430156			ARPA SR CENTER COMMUNITY EXPANARPA	SR CENTER COMM EXPANDED	.00	-40,000.00	-40,000.00	
	010 -4500-5210-202-001-430156-					To budget grant amt rec	10/26/2023			
2	55210202	510010			ARPA SR CENTER COMMUNITY EXPENSALARIES AND WAGES		.00	24,032.00	24,032.00	
	010 -5500-5210-202-001-510010-					To budget grant amt rec	10/26/2023			
3	55210202	520050			ARPA SR CENTER COMMUNITY EXPENFICA		.00	1,838.00	1,838.00	
	010 -5500-5210-202-001-520050-					To budget grant amt rec	10/26/2023			
4	55210202	520060			ARPA SR CENTER COMMUNITY EXPENGROUP	HOSPITAL INSURANCE	.00	7,441.00	7,441.00	
	010 -5500-5210-202-001-520060-					To budget grant amt rec	10/26/2023			
5	55210202	520070			ARPA SR CENTER COMMUNITY EXPENRETIREMENT		.00	3,098.00	3,098.00	
	010 -5500-5210-202-001-520070-					To budget grant amt rec	10/26/2023			
6	55210202	520120			ARPA SR CENTER COMMUNITY EXPEN401K-EMPLOYER SUPPLEMENT		.00	721.00	721.00	
	010 -5500-5210-202-001-520120-					To budget grant amt rec	10/26/2023			
7	55210202	560260			ARPA SR CENTER COMMUNITY EXPENADVERTISING		.00	2,870.00	2,870.00	
	010 -5500-5210-202-001-560260-					To budget grant amt rec	10/26/2023			
** JOURNAL TOTAL								0.00		

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Karen Logan, Clerk to the Board

ITEM TYPE: Appointment

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Board Re-Appointment, Juvenile Crime Prevention Council - JD Hartman

SUGGESTED ACTION:

ATTACHMENTS:

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Karen Logan, Clerk to the Board

ITEM TYPE: Appointment

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Board Re-Appointment, Piedmont Triad Regional Workforce Development Board - Thomas Bongaerts

SUGGESTED ACTION:

ATTACHMENTS:

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Karen Logan, Clerk to the Board

ITEM TYPE: Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Community Service Block Grant

SUGGESTED ACTION:

ATTACHMENTS:
[YVEDDI CSBG - Davie.pdf](#)
[FY 2024-25 CSBG Grant Application - DRAFT Completed 10-13- 2023 \(1\).pdf](#)

**Community Services Block Grant [CSBG]
Documentation of Submission to County Commissioners**

Background: The North Carolina Administrative Code [10A NCAC 97C.0111 (b)(1)(A)] requires that each CSBG grant recipient submit its Community Anti-Poverty Plan [grant application] to each County Commissioner Board that it serves.

Instructions: This form is to be completed and notarized by the Clerk to the Board.

Agency Name: Yadkin Valley Economic Development District, Inc.

County: Davie

Date of Application Submission: October 19, 2023

[Note: This application should be submitted to the County Commissioners at least thirty [30] days prior to application submission to the Office of Economic Opportunity [OEO]. The grant application is due to OEO **November 20, 2023**.

Clerk to the Board should **initial all items below**.

_____ The agency submitted a complete grant application for Commissioner review.

_____ The Clerk to the Board will be responsible for assuring that the application is distributed to the Commissioners.

_____ Commissioners' comments provided those to the agency. (If applicable)

Clerk to the Board

Date

Notary

Date

North Carolina Department of Health and Human Services

Division of Vocational and Rehabilitation Services



Community Services Block Grant Program

Fiscal Year 2023-24 Application for Funding
Project Period July 1, 2024– June 30, 2025
Application Due Date: November 20, 2023

Agency Information			
Agency:	Yadkin Valley Economic Development District, Inc.		
Agency:			
Federal I.D.	56-0851147		
UEI Number:	XGR4KGDEMG93		
Administrative Office Address:	533 N. Carolina Ave., Boonville, NC 27011		
Mailing Address (include the 4-digit zip code extension):	P.O. Box 309, Boonville, NC 27011		
Telephone Number:	336-367-7251		
Fax Number:	336-367-3637		
Proposed Funding:	CSBG: \$379,490	Additional Resources: \$14,229,062	Agency Total Budget: \$14,608,552
Application Period:	Beginning: July 1, 2024	Ending: June 30, 2025	
Board Chairperson:	Mickey Cartner		
Board Chairperson's Address: (where communications should be sent)	280 Wandering Lane Mocksville, NC 27028		
Board Chairperson's Term of Office (enter beginning and end dates):	2010-2024		
Executive Director:	Kathy D. Payne		
Executive Director Email Address:	kpayne@yveddi.com		
Agency Fiscal Officer:	Jan Zachery		
Fiscal Officer Email Address:	jzachery@yveddi.com		
CSBG Program Director:	Dawn Cheek		
CSBG Program Director Email Address:	dcheek@yveddi.com		
Counties Served with CSBG funds:	Davie, Stokes, Surry, and Yadkin Counties		
Agency Operational Fiscal Year:	July 01, 2024 – June 30, 2025		

North Carolina Department of Health and Human Services
Office of Economic Opportunity –
2420 Mail Service Center / Raleigh, North Carolina 27699-2420

Proposed Funding

CSBG: Enter the proposed amount of CSBG funds allocated for FY 2024-25.

Additional Resources: Enter the amount of other resources the agency expects to receive during the 2024 program year. If an exact figure is not known at this time, the best possible estimate.

Agency Total Budget: Enter the sum of CSBG and Additional Resources for the period of July 1, 2024 - June 30, 2025.

Checklist to Submit a Complete Community Services Block Grant (CSBG) Application

Please put a check mark in the appropriate box to show that you have included the completed document with your application. All documents are required with the exception of those that say "if applicable."

Item	Included (✓)
Signed Application Certification (blue ink only)	
Signed Board Membership Roster (blue ink only)	
Board of Directors Officers and Committees	
Board of Directors Community Needs Assurance	
Planning Process Narrative	
Form 210 – Agency Strategy for Eliminating Poverty	
Form 212 – One-Year Work Program	
Monitoring, Assessment and Evaluation Plan	
Form 212A – CSBG Administrative Support Worksheet (if applicable)	
Form 225 – Agency Budget Information	
Form 225N-Budget Narrative	
<u>Appendices (to be attached by the Applicant):</u>	
• Organizational Chart (do not include names)	
• Job Description and Resume for the Agency's Executive Director	
• Job Description and Resume for the Agency's Chief Financial Officer	
• Job Descriptions for all CSBG employees (do not include names)	
• Affirmative Action Plan	
• Documentation of Public Hearings for Initial Planning Process:	
Copy of Public Notice(s) from Newspaper(s)	
Agenda of Public Meeting(s)	
Copy of Attendance Sheet(s)	
Minutes of Public Meeting(s)	
• Documentation for Notice of Intent to Apply:	
Copy of advertisement(s)	
• Documentation of Submission to County Commissioners:	
Notarized document from county clerk	
Commissioners' comments or minutes (if applicable)	
• Cognizant-Approved Indirect Cost Agreement	
• Copy of the Proposal Application submitted to the cognizant agency for approval of the Indirect Cost Rate	
• Cost Allocation Plan (if applicable)	
• Vehicle Registrations (<i>must be up-to-date and after July 1, 2023</i>)	
• State Certification-No Overdue Tax Debts	
• State Certification-Contractor Certification required by N.C. Law	
• Federal Certifications	
• Cost Allocation Plan Certification	
• Federal Funding Accountability and Transparency Act (FFATA)	
• Central Contractor Registration (CCR) (<i>must be up-to-date and after July 1, 2023</i>)	

**Checklist to Submit a Complete Community Services Block Grant (CSBG) Application
(continued)**

Item	Included (✓)
• IRS Tax Exemption Verification- verifies the agency's 501 (c) (3) status <i>(must be dated after July 1, 2020)</i>	
• Conflict of Interest Policy <i>(must have been approved within the past 5 years and must be notarized)</i>	
• Contractual Agreements/leases <i>(must be current within contract period)</i>	

Board of Directors' Membership Roster

Total Seats Per Agency Bylaws	22	Total Current Vacant Seats	2
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Total Number of Seats Reserved for Each Sector	Low Income	6	Public	8	Private	8
Total Number of Vacant Seats Per Each Sector	Low Income	2	Public	0	Private	0

Name	County of Residence	Community Group/ Area Represented	Date Initially Seated [month/year]	Number of Terms Served [completed]	Current Term Expiration [month/year]
Low Income Sector					
1. VACANT		Low Income			
2. Amy Bryant	Stokes	Low Income	04/22	1	04/25
3. Larry Hayes	Davie	Low Income	04/23	0	04/26
4. Sylvia Jessup	Stokes	Low Income	04/05	6	04/24
5. Shelby King	Surry	Low Income	04/07	5	04/25
6. Brent Ward	Davie	Low Income	08/21	2	04/25
7. Angie Walker	Yadkin	Low Income	08/22	1	04/25
8. VACANT		Low Income			
Public Elected Officials					
1. Natalie Williams	Wilkes	Commissioner/Appointee	4/20	2	04/26
2. Eddie Harris	Surry	Commissioner	2/11	4	04/24
3. Bernita Finney	Davie	Commissioner	04/22	1	04/25
4. Brad Chandler	Stokes	Commissioner	04/21	0	04/24
5. Larry Johnson	Surry	Commissioner	02/17	2	04/26
6. Keith Wood	Stokes	Commissioner	4/23	1	04/26
7. Cliff Collins	Yadkin	Commissioner	02/11	4	04/26
8. Suzanne Wright	Davie	Commissioner (Representative)	04/16	2	04/25
Private Sector					
1. James Brown	Davie	Business	06/15	2	04/24
2. Mickey Cartner	Davie	Bus./Insurance	06/10	4	04/24
3. Kelly Craine	Stokes	Law Enforcement	01/12	3	04/26
4. Pam Crouse	Yadkin	Education	4/22	1	4/26
5. Debra Jessup	Stokes	DV/HS Mandate / Attorney	10/11	4	04/25
6. Richard Lasky	Yadkin	RSVP - PAC	04/08	4	04/26
7. Melissa Ledbetter	Yadkin	HS Mandate / EC Expert	04/23	0	04/26
8. Tom Bachmann	Surry	OAA Rep.	8/21	0	04/26

The signature of the Board of Directors Chairperson certifies that the persons representing the poor were selected by a democratic process and that there is documentation on file that confirms the selection of all board members. In addition, by signing below, the Board of Directors Chairperson confirms that the selection of all board members coincides with the directives outlined in the agency's bylaws and that a current Board of Directors Member Profile is on file for each member.

Board of Directors Chairperson

Board of Directors' Membership Contact Listing

Board Member	Physical Address	Email Address
Natalie Williams	290 Country Oak Ln. Wilkesboro, NC 28697 (Yadkin Appointee)	nwilliams@yadkincountync.gov
Eddie Harris	848 Liberty School Rd. State Road, NC 28676	harrise@co.surry.nc.us
Brad Chandler	1457 Forrest Road Westfield, NC 27053	bchandler@co.stokes.nc.us
Cliff Collins	5634 Weaver Road Hamptonville, NC 27020	tcollins@yadkincountync.gov
Larry Johnson	159 Samuel Trail Mt. Airy, NC 27030	johnsonla@co.surry.nc.us
Larry Hayes	109 Hayes Lane Mocksville, NC 27028	hayeslarry65@yahoo.com
Benita Finney	PO Box 1332 Mocksville, NC 27028	bfinney@daviecountync.gov
Suzanne Wright	210 Hospital Street Mocksville, NC 27028	swright@daviecountync.gov
Amy Bryant	609 Rock Hill Church Rd. Ararat, NC 27007	Buttercup0884@gmail.com
Melissa Ledbetter	1644 Union Cross Church Road Yadkinville, NC 27055	lissab.328@gmail.com
Sylvia Jessup	2571 Frye Rd. Westfield, NC 27053	sylviajessup@gmail.com
Shelby King	238 W. Virginia St. Mt. Airy, NC 27030	None
Keith Wood	1094 Wood Road Danbury, NC 27016	keithwood0@gmail.com
Brent Ward	244 Holly Lane Mocksville, NC 27028	Brent.ward8395@gmail.com
Angie Walker	4237 River Road Boonville, NC 27011	awalker@nwrl.org
James Brown	498 Ridge Rd. Mocksville, NC 27028	Jeb926@yadtel.net
Mickey Cartner	280 Wandering Lane Mocksville, NC 270287	mickeycartner@hotmail.com
Kelly Craine	1418 Flynt Road King, NC 27021	kcraine@hotmail.com
Pam Crouse	2040 Bovendertown Rd. Yadkinville, NC 27055	pscred17@yadtel.net
Debra Jessup	P.O. Box 138 Westfield, NC 27053	drjessup22@gmail.com
Richard Lasky	P.O. Box 185 Boonville, NC 27011	richard_lasky@msn.com
Tom Bachmann	266 Montclair Dr. Mt. Airy, NC 27030	Tom.bachman@embaqmail.com

Vacant		
Vacant		

Board of Directors' Officers and Committees

Note: All committees of the board should fairly reflect the composition of the board (10A NCAC 97C .0109). Be sure to identify the chairperson and other committee positions.

Name	Office	Sector Represented	County Represented*
Officers of the Board			
Mickey Cartner	Chairperson	Private Organization	Davie
Eddie Harris	Vice Chair	Public Elected Official	Surry
Jim Brown	Treasurer	Private Organization	Davie
Sylvia Jessup	Secretary	Low Income	Stokes
Tom Bachmann	Chaplin	Private Sector	Surry
Committee Name: Planning and Evaluation			
Tom Bachmann	Chairperson	Private Sector	Surry
Natalie Williams		Public Sector	Yadkin
Benita Finney		Public Sector	Davie
Eddie Harris		Public Sector	Surry
Keith Wood		Public Sector	Stokes
Shelby King		Low-Income Sector	Surry
Brent Ward		Low-Income Sector	Davie
Pam Crouse		Private Sector	Yadkin
Vacant		Low-Income Sector	
Committee Name: Finance			
Jim Brown	Chairperson	Private Sector	Davie
Mickey Cartner		Private Sector	Davie
Melissa Ledbetter		Private Sector	Yadkin
Brad Chandler		Public Sector	Stokes
Cliff Collins		Public Sector	Yadkin
Larry Johnson		Public Sector	Surry
VACANT		Low Income	
Committee Name: Personnel			
Richard Lasky	Chairperson	Private Sector	Yadkin
Suzanne Wright		Public Sector	Davie
Amy Bryant		Public Sector	Surry
Larry Hayes		Low-Income	Davie
Sylvia Jessup		Low-Income	Stokes
Angie Walker		Low-Income	Yadkin
Kelly Craine		Private Sector	Stokes
Debra Jessup		Private Sector	Stokes
Committee Name:			
	Chairperson		
Committee Name:			
	Chairperson		

*To be completed by agencies serving multiple counties.

**Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
Planning Process Narrative**

1. Explain in detail how each of the following was involved in the planning and development of this strategic plan.

The YVEDDI Board of Directors, the CSBG governing body, elects representatives of the low-income of the Board to maintain a tripartite Board, as prescribed in the CSBG Administrative Code. Each year the program staff performs surveys, does presentations, and gathers information concerning the current needs of low-income people. Our Head Start Program conducts a thorough community needs assessment, as part of their grant application, which is presented as part of the YVEDDI Board development process. CSBG utilizes the findings of this assessment to help drive our program delivery method. We procured the services of Howell, LLC., to perform a professional larger scope Needs Assessment for the entire agency. It was completed and approved by the board in June 2020. This was a crucial component in determining the larger scope of needs in our communities. Shawn Howell of Howell LLC holds both NCRMT and NCRI certifications, which is valuable in the utilization of the Results Oriented Management and Accountability Cycle and setting appropriate targets.

Ongoing networking occurs with agencies as: churches and faith-based organizations, recreation centers, public housing facilities, DSS, Work Force Development, health departments, Goodwill, Vocational Rehab, etc. Information about the programs currently operated by Yadkin Valley Economic Development District, Inc. is provided to these agencies, relative to the specific challenges in the individual and surrounding communities. YVEDDI proposes and advises how the YVEDDI agency can be of assistance in addressing these challenges as a collaborative effort. YVEDDI's CSBG participation focuses on the needs of the low-income population involved with its network of community agencies and organizations and how YVEDDI CSBG can assist in addressing those needs. By attending the interagency meetings we are able to communicate our plans for this grant and gather information from the communities that we serve.

In addition to working with state and local government agencies (e.g. DSS, Vocation Rehabilitation, NCAP, Employment Security Commission, NC Works, Piedmont Triad Regional Council), specific county collaboration efforts include, but are not confined to, the following:

Davie County: Davie Community Collaborative, which is facilitated by Partners Health Management as Davie county's Managed Care Organization (MCO); Local Interagency Coordinating Council, facilitated by Smart Start of Davie county and comprised of multiple agencies, community partners, and parents that represent families with children ages 0-5; Family Promise of Davie county; The Davie Foundation; Advocacy Center of Davie county.

Stokes County: Stokes Community Collaborative, which is facilitated by Vaya Health as Stokes county's MCO; Exodus Ministries; Daymark Recovery Services; The Way; Choose Life; Stokes Partnership for Children

Surry County and Yadkin Counties: CSBG attends the Surry-Yadkin Employment Services Collaborative every three months. This group is comprised of various organizations such as: Goodwill, Piedmont Triad Regional Council (PTRC), Surry Community College work programs, Surry Community College Small Business Services, Employment Security Commission, Economic Development, YVEDDI CSBG and Transportation, Domestic Violence, Project Re-entry, Representative of Disabled Veterans Employment Consultant, Department of Social Services of Surry County, and Vocational Rehabilitation. The group exchanges information and is an excellent way to keep updated on what other partners are doing in our communities and how we can collectively provide better services. There is a satellite campus of Surry Community College in Yadkin County that focuses not only on adults but on high school students with the Yadkin Early College.

Representatives of the low-income sector on the YVEDDI Board of Directors have input into the planning process at both the full Board and committee levels. A public hearing is held after being advertised in the local media to solicit comments from the general public at the beginning of our three-year program period and a request for the Intent to File for the funding is requested each year and is voted on and approved by the YVEDDI Board of Directors. CSBG keeps the Board informed on our program and the progress of our customers.

We assist our customers in examining the barriers that contribute to poverty, emphasizing the importance of low-income families having the opportunity to earn a living wage. The importance of budgeting, saving, investments, asset accumulation, and increasing net worth are as important to moving households out of poverty as learning about earned income and community collaboration. We strongly encourage our customers to pursue educational and training opportunities, especially by utilizing local educational institutes and online courses when possible. These strategies empower economically and educationally disadvantaged families to become more intrinsically involved in their communities.

a. Low-Income Community:

Members of the low-income sector are key in driving the activities, outcomes, and/or goals of our agency. Members of the low-income sector participated both directly and indirectly during the planning and approval process. Many low-income individuals/families report vital information to staff, leadership, the YVEDDI Board, and the strategic planning committee through surveys, attending program committee meetings, as well as participating in advocacy groups. Individuals/families from the low-income sector can give a first-hand account of barriers that they face and challenges with current processes. Their involvement helps ensure that we have made a thorough review of options and solutions for the best outcome at a given time.

b. Agency Staff:

YVEDDI is rich in its own in-house resources. YVEDDI is comprised of the following: CSBG, Domestic Violence/Sexual Assault, Head Start, Public Transportation, Retired Senior Volunteer Program, Senior Centers, OAA/Senior Services providing many services including congregate and home-delivered meals, and Weatherization. On a monthly basis, directors from each of the YVEDDI Programs: complete a written report

which is utilized at monthly Leadership meetings with the executive-level administration. At these meetings, information is gathered from across all programs within YVEDDI. This information is used to not only help with in-house collaboration but also share community partner resource information. The information gathered during these meetings is a crucial component in the planning process of the Strategic Plan.

CSBG program staff meets regularly to review participant files and discuss cases, we discuss changes in community resources, as well as any other information affecting our customers or delivery methods. We work with our communities utilizing our trained and certified Bridges Out of Poverty staff. CSBG strives to convey the message that all sectors can play a key role in helping provide communities with a resource-rich environment that can help set-people up for success in their path to self-sufficiency. Surveys are conducted with our customers and we track their responses which are reported quarterly to our YVEDDI Board Planning and Evaluation Committee. Those are combined with other agency program surveys to ensure on-going relevant information.

The staff prepares the application utilizing the ROMA Cycle by examining the community needs assessment, yearly outcome measures as well as the previous year's operation information that comes from the public sector, low-income groups, agency experience, and assessment, coordination with other organizations, and information provided by various governmental, non-profit, and private entities.

YVEDDI's administrative staff, the accounting staff, and the programmatic staff have all collaborated in an integrated effort to ensure consistency, accuracy, and thoroughness in our current grant application. The management team responsible for writing this grant solicits information from Board members, especially representatives of the low-income sector, to ensure Board input. This interaction ensures that Board members are knowledgeable about our self-sufficiency program. Changes in each successive year's grant application are the results of information gained through monitoring, assessment, and evaluation of the previous year's agency performance outcomes and updated county information. The current CSBG proposal was not written in isolation but was the culmination of information gained from a wide range of valuable resources in our communities. We examined the barriers contributing to poverty in Davie, Stokes, Surry, and Yadkin Counties, such as the characteristics of the local economy and how this impacts our customers, agency funding, fiscal year outcomes, local employers as well as studying the demographics of our four counties. We also utilized information from the Community Commons area located on the Community Action Partnership website. Consideration was given to any needed changes to our model of programming.

c. Agency's Board Members:

The Board authorizes the staff to develop the application based on the information collected from the previous year's statistics and community data on poverty. Under the direction of our Executive Director, our Board has adopted a new CSBG Organizational Standard Board Plan and filled vacant Board positions to ensure compliance. The application for funding is presented to the Board and a request for the intent to apply for the funding is voted and approved. County Commissioners from Davie, Stokes, Surry, and Yadkin Counties and representatives from local agencies that serve the low-income population review and have the opportunity to comment on the plan. Board activities are recorded in the minutes of our Board package. The Board is offered training at bi-monthly meetings concerning various topics.

2. **Describe how and what information was gathered from the following key sectors of the community in assessing needs and resources during the community assessment process and other times. These should ideally be from each county within your agency's service area:**

- a. **Community-based organizations:**

Surry Yadkin Employment Collaborative, Family Resource Center, county economic development, Healthy Davie Community Assessment, DISSY – organization to assist homeless, Healthy Davie, Davie Collaborative, Stokes Partnership for Children, NETworX, Surveys were distributed, to participates on committees, attending quarterly/monthly meetings, participating in workshops.

- b. **Faith-Based Organizations:**

The director requested Success Coaches contact churches in each county – Davie, Stokes, Surry, Yadkin – to access what needs they are seeing in their communities and what resources they are able to provide. Members of Faith-Based Organizations attend many of the same collaborative as the YVEDDI staff which enables us to gain additional information.

- c. **Private Sector:** : Educators, business owners, attorneys, NC Works Commission employer needs survey

- d. **Public Sector:** County commissioners, policy counsels, online surveys accessible through our website

- e. **Educational Sector:** Working with teens from the Yadkin Success Academy through Yadkin Methodist Church, NetWorX to conduct a Getting Ahead Workshop. Individuals from the educational sector attend many of the same collaboratives as the YVEDDI staff, which enables us to gain additional information.

3. **Describe your agency's method and criteria for identifying poverty causes including how the agency collected and analyzed qualitative and quantitative data in identifying those causes.**

During the last comprehensive agency needs assessment, a variety of data types were collected and analyzed during the development of the needs assessment. A summary of these data types, their sources, and the process used to translate the data into meaningful information is detailed below.

Statistical Research: *Statistical information was gathered through online research from more than five dozen unique data sources (see section 8) demonstrating federal, state, regional and local data. Organizational data, extrapolated from the agency's client tracking system, was integrated into quantitative research to provide statistics concerning the needs of individuals and family's actually requesting assistance during the most recently completed fiscal year.*

- **Community Member Surveys:** *Surveys were administered to local residents of Davie, Stokes, Surry, and Yadkin counties. A total of 81 individuals participated in these surveys, including 52 that considered themselves to be "low-income". An additional 265 surveys collected during the most*

Agency Team Member Surveys: A total of 52 agency staff members participated in surveys representing administration (24%), middle management (39%), and front-line delivery staff (37%).

- *Board Member Surveys: Surveys were collected from 7 members of the organization's governing body representing the public (14%), private (29%), and target (57%) sectors. An additional 3 members of the organization's Head Start Policy Council also participated, all of which represented the target population.*
- *Key Informant Surveys: Key Informants provided a total of 23 surveys. Participants included representatives from local government (35%), faith-based organizations (13%), state government (9%), local businesses (9%), law-enforcement (4%), landlords (4%), educational institutions (4%), and other nonprofits (22%).*
- *Focus Groups: A total of three focus groups were conducted throughout the region over a two-day period. Participants included agency team members, nonprofits, educational institutions, local businesses, and low-income community members.*
- *Data Analysis: Data analysis was conducted in two phases utilizing comparative, trend, descriptive, and exploratory processes. Prioritization of needs was determined using a priority consensus ranking based on data obtained from surveys with causes of poverty weighted by average prioritization scores submitted by respondents, and conditions weighted by counts of observed community needs. Prioritization tables are provided for the region and each county, along with flow charts demonstrating identified causes of the primary conditions, in section 10 of this document.*

Conclusion:

The poverty rate has decreased by 16.02% over the past five years, with recent data indicating that 29,546 local residents (15.10%) in 8,946 households (11.22%) are currently living in poverty according to the nationally accepted definition. It is estimated, however, that 45,805 households (57%) are at risk of economic insecurity based on household incomes and the region's cost of living. The reduction in poverty is primarily attributed to (1) a decreased unemployment rate, (2) increased wages, and (3) an influx of higher resourced retirees." (*YVEDDI CNA per Howell, LLC.)

4. Describe activities that your agency has undertaken to advocate for and empower low-income individuals and families to achieve economic independence and security.

YVEDDI advocates empowering low-income individuals/families beginning with our Agency Basic Philosophy, Strategies, Mission Statement, following the CSBG Administrative Code, and Organizational Standards. YVEDDI is governed by a tri-partite Board of Directors of which one third (1/3) membership of the Board of Directors is reserved for the low income sector. Concentrated efforts are taken to assure that the poor have direct access to all planning and development functions and activities undertaken by the agency.

The Basic Philosophy and Strategy is that "YVEDDI believes that desiring individuals/families can become self-sufficient and become positive contributors to society." Understanding the following is vital to our customer's success:

- To alleviate and eliminate poverty we must assist under-resourced individuals/families to secure and utilize available resources
- Provide opportunities for individuals/families to improve their self-sufficiency by overcoming barriers that contribute to the cycle of poverty
- Promote and enhance the individual/family unit as a whole to encourage them by focusing on strengths, skill sets, and support networks
- Providing an accurate perception to our customers and our communities of how poverty impacts individuals and communities with an understanding of economic realities as a starting point both for reasoning and for developing plans for transition

YVEDDI conducts and operates a Self-Sufficiency Program designed to assist individuals/families to overcome poverty. We believe that education about poverty is the best way to find solutions. We encourage customers to understand the hidden rules of the middle and upper classes so they can be used to navigate new environments, resolve conflicts, and build relationships of mutual respect and social capital. We encourage budgeting and hold nutrition classes when available. We attend the Davie, Iredell, Stokes, Surry, and Yadkin Counties Regional meetings for Rapid Re-housing (DISSY) addressing funding and the problems of homelessness in our area. We as a CSBG team stay involved in our community forums and partner with many area agencies to stay abreast of new opportunities for jobs and new causes of poverty and needs resulting from poverty.

YVEDDI boosts the Self-Sufficiency of a customer's self-esteem and self-confidence by helping them build a future story. We do this by establishing trust, forming a plan with . YVEDDI conducts and operates a Self-Sufficiency Program designed to assist individuals/families to overcome poverty. We believe that education about poverty is the best way to find solutions. We encourage customers to understand the hidden rules of the middle and upper classes so they can be used to navigate new environments, resolve conflicts, and build relationships of mutual respect and social capital. We encourage budgeting and hold nutrition classes when available. We attend the Davie, Iredell, Stokes, Surry, and Yadkin Counties Regional meetings for Rapid Re-housing (DISSY) addressing funding and the problems of homelessness in our area. We as a CSBG team stay involved in our community forums and partner with many area agencies to stay abreast of new opportunities for jobs and new causes of poverty and needs resulting from poverty.

We have conducted many Cost of Poverty Experiences (COPE) and Bridges Out of Poverty presentations in the past few years. We have conducted a COPE experience with the YVEDDI Board. This offered Board members the opportunity to see how difficult it is to navigate the everyday world of under-resourced individuals. When bringing local partners together, their staff were offered case studies and exercises that provided a better understanding of the challenges facing those in poverty. From those interactions, we were able to all gain a better understanding of what our community resources were abundant in and what was lacking. Through the discussions, everyone was able to better appreciate how complicated it can be for under-resourced individuals to navigate the system of resources that are there to provide assistance.

We have also been able to conduct a COPE and Bridges event with one of our local school systems with approximately 150 educators attending. By sharing the information on poverty, we are facilitating community education on how a successful transition from poverty to self-sufficiency can be achieved. These educational opportunities have been valuable in providing a better understanding of the challenges and strengths of those under-resourced individuals and families living in poverty. Additional training has assisted our organization in better understanding poverty and constructive methods to assist low-income populations in achieving self-sufficiency.

- 5. Describe how your agency plans to make more effective use of coordinate and form partnerships with other organizations and programs including: State welfare reform efforts; public and private resources; religious organizations, charitable groups, and community organizations.**

Yadkin Valley Economic Development District, Inc. (YVEDDI) is assertive and leads the four (4) large counties and many communities, Davie, Surry, Stokes, and Yadkin in collaboration and coordination to pool resources, fill gaps in services and strives to prevent duplication of services. In our four (4) counties, the Departments of Social Services use YVEDDI as a major tool for diversionary assistance.

Yadkin Valley Economic Development District, Inc. (YVEDDI) will advocate for low-income citizens in our service areas and partner with other local and state agencies to provide needed services. The Department of Social Service customers are referred directly to YVEDDI to divert them from public welfare rolls. Most Work First participants enrolled in the CSBG Program are able to obtain employment and success due to program collaboration. Yadkin Valley Economic Development District, Inc. statistics indicate that Department of Social Services referred customers are much more successful in achieving self-sufficiency if they receive services before they are enrolled formally into long-term public assistance programs. We have secured a formal partnership with the NCCARE360 and Unite Us platforms.

Yadkin Valley Economic Development District, Inc. will continue to coordinate and seek enhanced collaboration with existing Work Force Centers as better partnerships for customer services. YVEDDI will continue to coordinate effectively with all the local Department of Social Services Work First Programs to assist mutual customers to become employed and self-sufficient. YVEDDI coordinates with community-based agencies as well as internal programs and provides outstanding assistance and support for initiatives such as Domestic Violence/Sexual Assault Programs, Head Start, Transportation, and Rapid Re-housing Program, Homeless/Women's Shelters, and our staff maintains seats on coordinating Councils, Boards, and Committees associated with economic development.

When programs and services provided by this agency are similar in nature they can provide a more favorable impact upon the lives of the participants we serve. This agency will coordinate services with other service providers and form partnerships to execute agreements of understanding, coordination, and partnerships. We work with many different agencies that provide emergency shelter, food, clothing, household items, hygiene products, and medical/dental services. Examples of these agencies are Storehouse for Jesus, Tri-County Ministries, Yokefellow Ministries, Grace Clinic, and The Ark. We attend community meetings and trainings with local agencies that provide information for upcoming employment opportunities, newly available resources, and findings that would affect community growth.

- 6. Describe how your agency will establish linkages between governmental and other social services programs to assure the effective delivery of such services to low-income individuals, to avoid the duplication of such services and to fill identified gaps in services, through the provision of information, referrals, case management and follow-up consultations.**

YVEDDI is committed to forming partnerships and coordinating programs serving low-income and under-resourced residents. YVEDDI conducts numerous onsite meetings, YVEDDI staff members serve on various Boards, and attend meetings at other community organizations. Since YVEDDI's beginning, close ties with religious organizations and charitable groups have served to strengthen the backbone of our agency. Clear and consistent communication with other organizations is enhanced by YVEDDI's willingness to be at the table when issues are being discussed. YVEDDI prides itself in being very visible in the community when partnerships are being formed and when coordination of human services is being conducted.

The primary, long-range goal is to reduce the number of customers in poverty within a two-year period. This will be achieved by providing comprehensive case management services and activities to families that are enrolled in the program. The CSBG Director continues to interact with the Department of Social Service with the goal of strengthening our partnership, having better communication, closing the gaps in services offered, and preventing duplication of services. We have Memorandums of Understanding with the DSS Directors in all four counties. We have a memorandum of understanding with the YVEDDI Head Start Program, Domestic Violence Program, Yadkin Christian Ministries, and United Methodist Church NETworX as well. We work both within our agency and with outside partnerships to provide the best service possible.

Eligible customer enrolled in the program can be assisted for a two (2) year period effective their date of enrollment. A contract/agreement is developed and must be signed by all appropriate members of the family prior to enrollment in the program, and the contract is executed between the family and Yadkin Valley Economic Development District, Inc. (YVEDDI). This contract contains the barriers/problems as identified, and a plan of action that details the specific assistance objectives or work plan agreed upon by the family and Yadkin Valley Economic Development District, Inc. (YVEDDI).

Much of Yadkin Valley Economic Development District, Inc. (YVEDDI) strategic planning is centered on service gaps, program expansion, and the best way YVEDDI can coordinate with other organizations in providing support for the working poor, the homeless population, those receiving assistance through Work First, and families who have been adversely affected by the economy. Yadkin Valley Economic Development District, Inc. (YVEDDI) has strengthened and expanded its Self-Sufficiency program through intensive Success Coaching, particularly structured around job placement, wage progression, information relating to available healthcare coverage options, economic literacy, transitional housing, career counseling, educational financial assistance, employment services, personal counseling and support, budgeting assistance, referrals to psychological counseling, referrals to substance abuse counseling, childcare services, transportation services, credit/debt management services, and any other services deemed necessary to move an impoverished household along a continuum, toward economic self-sufficiency including standard, affordable housing.

Yadkin Valley Economic Development District, Inc. (YVEDDI) has a service delivery model that includes an increased emphasis on educational training in career areas that will lead to employment providing a "living wage" rather than training leading to jobs paying low wages with little or no benefits. These services will attempt to remove barriers such as unemployment and underemployment. The CSBG Program will **continue to** expand our employment-related services through close linkages with

organizations like Workforce, the Workforce Centers Career Center, Division of Employment Security, Goodwill Industries, Davidson Community College, Surry Community College, and Forsyth Technical Community College to meet these needs. Community linkages have been strengthened by our transition process associated with our strategic plan. Old linkages are strengthened and new linkages are formed. We assess our partnerships periodically to evaluate recent outcomes. If we find that services and/or outcomes are not as anticipated, we will re-evaluate to assess what can be enhanced in order that our customers may receive the best possible benefit from the partnership.

Yadkin Valley Economic Development District, Inc. (YVEDDI) CSBG program continues to find ways to enhance the application of self-sufficiency services in the areas of financial literacy, budgeting strategies and classes, and changes in saving/spending habits. We provide written materials such as income and expense tracker notebooks to encourage customers to begin the budgeting process. Our agency has already noted the successful results of these efforts, increasing the self-sufficiency skills of our customers as a whole. Employment work factors have caused the pre-requisite of increased educational/skill levels across all sectors, resulting in the need for low-income customers to seek an increase in their own education/skill level. In order to compete in the local labor market, our customers seek educational assistance to improve their education and skill levels. This continues to be a progressive pattern toward securing gainful employment positions that provide essential benefits.

Yadkin Valley Economic Development District, Inc. (YVEDDI) CSBG customers have continued expressing a significant need for housing-related services whether it be rental assistance or utility assistance. The counties we serve have limited housing options for the low-income sector. As an example, many of the rental options are older apartments or houses which are not insulated well thus resulting in larger utility bills. These services are essential for individuals and families to maintain/secure housing and prevent homelessness.

Our agency service-delivery model is conducted over several integral steps. Upon referral, all customers are provided with an Orientation to the various services offered by the Yadkin Valley Economic Development District Inc. (YVEDDI) CSBG program. If customers are interested in pursuing services, they participate in the Intake process. This process is an information-gathering procedure, and it conveys the aspects and expectations of customer participation. Data is collected to build a case history and to allow for a Needs Assessment of the applicant's current situation. This information is collected by a Success Coach, supervised by the Community Services Director. This supervisory process ensures that eligibility criteria aspects are being met, that every possible avenue of Yadkin Valley Economic Development District, Inc. (YVEDDI) services have been explored, and that our agency has investigated supplementary and/or alternative ideas regarding what external options in the community can be utilized through referral.

Customer eligibility is determined by a Matrix, containing questions and criteria for success. The CSBG Success Coaching Teams have regular team meetings or conference calls. The county activities are discussed and cases are reviewed. Customers are notified within ten (10) working days (maximum) of their appointment to enroll in the program and originate their Success Plan. The Success Coaches are in constant contact with the CSBG Director on a daily basis. The Success Coach and the customer/families will jointly complete this comprehensive Success Plan. Realistic long-term self-sufficiency

goals and practical short-term objectives are emphasized. The actual assistance of the Success Coaching portion of our program begins immediately upon the signing of the Success Plan, with both the Success Coach and the customer working to meet their respective goals.

If customers do not make a responsible effort to follow Success Plan goals and objectives within the first 90 days after signing the Success Plan, the customer will meet with their Success Coach and discuss overcoming any barriers, changing goals for future success, and possible termination from the program if nothing is contributed toward activities to make them successful. The customer will receive written notification of their termination and subsequent denial of services. This letter will contain the reason for the denial of services, their “right to appeal” and staff names responsible for receiving requests for a hearing. The time frame for completing the hearing process is 30 days.

A customer’s Action Plan is customized to fit the household’s needs. The maximum length of program participation is two years. When the Success Coach decides that the customer has reached economic self-sufficiency, a minimum of 90 days, as measured by the North Carolina poverty index guidelines and the ROMA scale, the customer will graduate successfully from the Yadkin Valley Economic Development District Inc. (YVEDDI) CSBG program.

Our agency system of recordkeeping has been established that ensure that customer data required by the OEO is collected and will run parallel to AR4CA. Our customer files have been structured to organize materials and make utilization and monitoring more efficient. Income is verified on 100% of our customers. Standard strategies are adhered to in our program. These strategies emphasize Success Coaching of customer families along with direct provision of services that result in job placement, family income increase, and coordination services with local human services agencies to provide needed assistance. The results of our Self-Sufficiency Program are measured by a strict set of standard measures set by OEO Organizational Standards and the ROMA principles.

Outcome measures are documented through Quarterly Performance Reports and a Year-end Report that are submitted to the Office of Economic Opportunity and shared with the Board of Directors.

Our agency Self-Sufficiency Program is individualized for each household, it includes a bundled/holistic approach, and we attempt to draw upon every available community resource to supplement Yadkin Valley Economic Development District, Inc. (YVEDDI) funding to assist citizens in becoming self-sufficient.

A comprehensive list of YVEDDI Cooperative Linkages are provided on our website at www.yveddi.com and also provided in other areas of this grant.

- 7. Provide a description of how your agency will support innovative community and neighborhood-based initiatives related to the purposes of the Community Services Block Grant (fatherhood initiatives and other initiatives with the goal of strengthening families and encouraging effective parenting).**

We plan to achieve this by adhering to the Yadkin Valley Economic Development District, Inc. (YVEDDI) Basic Philosophy and Strategies which impact the community and neighborhood-based initiatives. The philosophy and strategies are as follows:

Philosophy

Yadkin Valley Economic Development District, Inc. (YVEDDI) believes that under-resourced customers will become more self-sufficient and become positive contributors to society with adequate resources, referrals, and support networks, prioritizing obtainable goals, and capitalizing on customer strengths.

Strategies

- To alleviate and eliminate poverty by assisting desiring customers to secure and utilize available resources for self-help efforts
- Provide opportunities for customers to improve their self-sufficiency by overcoming barriers that contribute to the cycle of poverty
- Promote and enhance the customer's unit as a whole to encourage focusing on strengths, skill sets, and support network

Our agency works and coordinates very closely with units of local governments, private and public human service agencies, the faith-based community, and other organizations that are in positions to assist low-income people in this community. The overall direction of the agency comes from the Executive Director who assigns various staff persons to provide coordination with different agencies and organizations. The Executive Director and other members of the agency staff serve on various local Boards and committees. There are interagency coordination committees that meet on a regular basis with agency staff including the Executive Director. Yadkin Valley Economic Development District, Inc. (YVEDDI) is known locally for its attendance at meetings, for our willingness and assertiveness to think "out of the box" to diversify our services to meet the changing needs of low-income families, and to be creative in our programming to keep our services on the cutting edge.

Yadkin Valley Economic Development District, Inc. (YVEDDI) emphasizes coordination with private employers for employment opportunities, with corporate and private businesses for services, the Workforce Investment Board, Chamber of Commerce, Goodwill Industries, Division of Workforce Solutions, and Work Force Centers for job leads in the private sector, private landlords for housing opportunities, local banks, and private citizens for volunteer services such as mentoring. The public sector is relied heavily upon for educational/job training, homeless services, public housing, program referrals, and a wide array of human services designed to remove citizens from poverty.

The Executive Director and the Chairperson of the Board handle coordination with the local private sector. YVEDDI works closely with our county commissioners in each county to keep them informed on the barriers of poverty. The financial support provided by the private sector over the years for the agency has been substantial, but it is usually handled in a personal and confidential manner.

In the past several years, Yadkin Valley Economic Development District, Inc. (YVEDDI) has strengthened relationships with the Workforce Investment, Goodwill Industries, Division of Workforce Solutions, Work Force Centers Career Center, the local Chamber of Commerce, and other entities that have direct contacts in the private sector. In addition, through Yadkin Valley Economic Development District, Inc. (YVEDDI),

employment, housing, and other services, we are expanding our individual contacts with the private sector through individuals such as private landlords, small business owners, business/industry, human resource directors, private daycare operators, transportation vendors, banks, private citizens as volunteers, and others for their help in assisting low-income households in becoming self-sufficient and helping to reduce causes of poverty. Board members have also been helpful in making new contacts with groups and individuals in both private and public venues.

Our services related to impoverished children in areas such as education, health, safety, nutrition, parenting, and other areas, are enhanced through YVEDDI's operation of Five Star Head Start programs in our area. CSBG and Head Start Staff work together to ensure the collaboration of in-service provision.

The Yadkin Valley Economic Development District, Inc. (YVEDDI) Board members represent the public and private interests, special interests, and the interests of low-income through community initiatives and development. Our agency's working relationship with the faith community often leads to excellent relationships with private sector groups and individuals.

YVEDDI continues to enhance its social media presence as a focus for public relations information showcasing agency videos to make our services more technologically applicable in today's world. YVEDDI CSBG relies on information from high school counselors and staff as well as our working relationship with NETworX and the Yadkin Success Academy to help develop ideas for youth initiatives that will have the greatest impact on the youth in the counties we serve. Prior to the COVID-19 "shut-down", the CSBG Staff was conducting a Youth Initiative utilizing Getting Ahead workshops which are part of the Bridges Out of Poverty framework, to help introduce important topics youth will face once they have completed high school years. These workshops were educational and fun inviting discussions regarding how to navigate their next season of life. Community members were invited to speak to the youth, such as a representative from a local bank who discussed how to open a checking account, the importance of savings, and obtaining loans for items such as a vehicle.

We are working, in tangent, with community providers to coordinate parenting classes and improve household functioning dynamics. With regard to mental health support initiatives, YVEDDI CSBG is developing goal-oriented strategies within the Davie Community Collaborative and the Stokes Community Collaborative, partnered with each county's respective MCO and Collaborative members.

8. Describe activities that your agency has undertaken or plans to undertake, on an emergency basis, for the provision of such supplies and services, nutritious foods and related services, as may be necessary to counteract conditions of starvation and malnutrition among low-income individuals.

YVEDDI's engagement with its community partners creates a pathway to meeting the needs of emergency assistance requests and emergency referrals the agency receives. In addition, YVEDDI CSBG possesses the situational ability to offer Food Lion (non-cash) cards to its customers and community members who qualify to receive services. Affiliation with NCCARE360 platform offers the opportunity to link with a multitude of agencies in the surrounding service areas, increasing YVEDDI's network reach for emergency and essential support services. Our activities also include

making referrals to local food pantries such as Yadkin Christian Ministries, local churches that serve meals, the Salvation Army, and referrals to Storehouse for Jesus in Davie County which provides extensive medical and dental services.

9. Describe how your agency will coordinate the provision of employment and training activities with entities providing activities through statewide and local workforce investment systems under the Workforce Innovation and Opportunity Act. Provide the dollar amount of your allocation that will go towards employment training.

Based upon federal, state, and program regulations this agency shall establish appropriate linkages between governmental and other local social service programs that provide service to low-income citizens. YVEDDI is actively engaged in the local Work Force Centers of employment and training services.

For customers seeking or needing to further their education and career development skills, YVEDDI CSBG coordinates with the following community colleges and institutes:

Davie: Davidson County Community College.

Stokes: Forsyth Technical Community College and Mount Eagle Institute

Surry: Surry Community College and Forsyth Technical Community College

Yadkin: Surry Community College – Yadkin Center

In addition to these campus-based institutions, YVEDDI CSBG provides support through online learning platforms across the state of North Carolina (e.g. Ed2Go platform via Wilkes Community College), which allows customers the flexibility to achieve educational gains while attending to employment and household responsibilities.

For workforce employment and training needs, YVEDDI utilizes Work Force Development (NC Works) and the WIOA program. This allows our customers to enter the workforce at a higher rate of pay and/or gain the additional skills necessary for that increase in pay rate. The local Division of Workforce Solutions is routinely involved in assisting in job placement activities. Duplication of services is avoided by continuous follow-up with other agencies by Success Coach in accordance with HIPPA Laws and other privacy acts.

Our agency shall act to assure that the service area residents are aware of and encouraged to participate in the planning activities of its program and activities by providing public notice of the planning activities as required by Federal Regulations, and will seize upon any and all opportunities to negotiate and enter into service provision agreements with desiring agencies that are of a similar nature. We feel that mentoring, coaching, and time preparing the customer for employment is the most important thing we do. Many of our customers lack soft skills, budgeting skills, and life skills. Once we have taught them how to get out of survival mode then they are ready to move forward into education/employment.

We plan to allocate approximately \$5,000 toward employment training. We are fortunate that many of the counties we serve have additional resources available to help residents reach their educational goals. When we partner with other community resources, especially those in the education sector, our customers have a wide range of resources and opportunities.

10. Describe how your agency will ensure coordination with the emergency energy crisis intervention program under title XXVI (relating to low-income home energy assistance).

Our Weatherization Program recently received the following funding

- \$951,776 for NC WAP Program
- \$222,411 for Blue Cross Blue Shield
- Three and a half million by Duke Energy each year for the state of NC

In FY 2022 we weatherized 73 homes, installed 45 heating systems, and assisted 123 people. In 2023 so far we have weatherized 59 homes and installed 28 heating systems, assisting 104 people.

We also refer potential customers for services. Program staff coordinate with providers for delivery of services when possible. Financial assistance information will be provided to agencies and organizations for program development, planning, and proposals when requested. We participate in outreach planning and our agency refers eligible households to the Department of Social Services to apply for assistance. Our Success Coach's distribute information and flyers to areas with a concentration of low-income residents, coordinates activities with Crisis Control Ministries, and accepts referrals on applicants who did not qualify for fuel assistance and refers them to other sources as we deem appropriate. Yadkin Valley Economic Development District, Inc. provides transportation for persons who have no other means of transportation. Our transportation department has a fleet of over 62 vehicles from cars, wheelchair vans, mini vans, and light transportation buses.

11. Describe the needs of low-income youth and your agency's efforts to promote increased community coordination and collaboration in meeting the needs of low-income youth.

CSBG collaborates with other organizations to assist with the needs of low-income youth in our communities. Previously, YVEDDI CSBG coordinated an initiative with NETworX to conduct our Youth Initiative Getting Ahead Workshops. The Covid-19 pandemic prevented the conclusion of this initiative, but NETworX and participating youth expressed benefits gained from workshops conducted. YVEDDI CSBG is in the developmental stages of another such initiative with NETworX and the Yadkin Success Academy.

Our service area encompasses largely rural geography and population. As such, transportation and accessibility to programs can be significant barriers to participation. The school systems, civic groups, and faith-based organizations have the largest involvement in this area. Other ways we assist are listed below:

1. School supplies and book bags are supplied to our customers with children
2. Summer Youth Employment when possible
3. Job Training/Technical Education
4. Life Skills - NETworX
5. Transportation Assistance

6. Promotion of community involvement through resource fairs, and attending Community Collaborative meetings.
7. Food assistance
8. Clothing items for homeless veterans

12. Describe your agency's method for informing custodial parents in single-parent families that participate in CSBG programming about the availability of child support services. In addition, describe your method for referring eligible parents to the child support office[s].

Yadkin Valley Economic Development District, Inc. (YVEDDI) CSBG Success Coach's inform all single custodial parents of their right to seek child support from the non-custodial parent and connect them with the appropriate agencies. YVEDDI CSBG Success Coach's refer all participating custodial parents to the local Child Support Enforcement Agency. By seeking child support from the non-custodial parent it will increase needed household income that provides shelter, food, clothing, medical needs, and any other necessities for said children.

Section 50-13.4 of NC General Statutes requires the Conference of Chief District Judges to prescribe uniform statewide presumptive guidelines for determining the child support obligation of parents, and to review the guideline periodically (at least once every four years) to determine whether the application results in appropriate child support orders.

13. Describe activities that your agency has undertaken or plans to undertake, to address the Department's priorities which includes:

- Combat the **Opioid Crisis** by focusing on policies and practices that prevent opioid misuse, addiction and overdose;
 - YVEDDI staff have been trained on how to handle opioid and other drug-related situations, including identification and misuse/misappropriation.
 - Our Family Resource Center in Surry County offers a Support Group called Parents of Addicted Loved Ones.
 - Our organization often participates in Drug Take Back programs held by local Sheriff's departments
 - YVEDDI CSBG staff participation in Stokes and Davie Community Collaborative meetings directly addresses solution-based directives that address the Opioid Crisis.
 - Agency partnership with Insight Human Services presents opportunities for education, treatment, and prevention of Rx misuse.
- Develop better outcomes for **Early Childhood** learners to ensure that they are healthy, safe and nurtured, learning and ready to succeed;
 - YVEDDI Head Start has aligned our readiness goals with the Foundations (Early Learning Strategies for NC Preschoolers and Strategies for Guiding Their Success).

- These goals are thought to be age-appropriate for our children and address the domains of learning that we measure through our ongoing assessments.
 - Data to support the achievement of the goals are aggregated and analyzed after each child assessment, in accordance with our Outcomes Plan. Assessments are conducted three times during the school year.
 - The school readiness goals are created in conjunction with parents and we will determine each child's progress in language and literacy, cognition and general knowledge, approaches toward learning, physical well-being and motor development, and social and emotional development. We will also use the gathered assessment data to individualize services and teaching to best support each child.
- Expand **NCCARE360**, a statewide database that provides resource information for medical providers and human services professionals in response to social determinants of health like housing stability, food security, transportation access and interpersonal safety; and
 - YVEDDI is registered for this program, CSBG has two personnel who are able to assist any requests.
 - Implement **Healthy Opportunities** that improve the health, safety and well-being of North Carolinians by addressing conditions in which people live that directly impacts health.
 - Our Weatherization program participates with the BCBS Healthy Homes program and each time a home is weatherized a family's health is impacted.
 - Our Meals on Wheels program feeds qualifying elderly which allows them to stay longer in their home.
 - YVEDDI transportation transports people to life-sustaining medical appointments.

**Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
OEO Form 210**

Agency Strategy for Eliminating Poverty

Planning Period: July 1, 2024 – June 30, 2025

Section I: Identification of the Problem (use additional sheets if necessary)

- 1. Give the Poverty Cause name(s), rank the poverty cause(s) and identify which one(s) the agency will address.**

Yadkin Valley Economic Development District, Inc. has identified inadequate income due to:

1. Lack of transportation affordability as well as availability.
2. Lack of availability of jobs providing a living wage in our four-county areas
3. Lack of affordable childcare and other comprehensive services.

These barriers are part of the problem that prevents low-income families from becoming self-sufficient. Our focus is on each of the items listed above, especially transportation. Without reliable transportation, the customer is unable to work or attend classes to acquire new skills.

Community outreach is an essential component in needs and problem-area identification. Working with our communities on the systemic causes of poverty and how to overcome the accompanying challenges are subsequent steps in this identification. YVEDDI CSBG customers learn how to recognize the layers of under-resourced areas of their lives and develop action plans to address individual barriers.

- 2. Describe the poverty cause(s) in detail in the community with appropriate statistical data (include data sources).**

*****DATA Source – Howell, LLC. – Needs Assessment available upon request***

Primary Conditions of Poverty ***{data from Howell, LLC. is shown in italics}

Although poverty may impact every household and community in a different way, regional survey data indicates that the most common concerns include the inability to secure/maintain the following items:

- (1) Safe and affordable housing*
- (2) Physical healthcare*
- (3) Nutritional foods*
- (4) Mental healthcare*
- (5) Utility services*

The most prevalent of these barriers, as identified by survey respondents and verified by quantitative research, include the following:

- (1) The lack of living wage jobs in the community*
- (2) The lack of qualifications needed to secure meaningful employment*
- (3) The lack of financial management skills*
- (4) The lack of affordable childcare options in the community*
- (5) The lack of personal access to transportation*

(A) Explain why the problem exists.

There are complex combination of barriers that are deeply rooted in the lives of local residents and the infrastructure of the community. The most prevalent of these barriers, as identified by survey respondents and verified by quantitative research.

- *The community lacks living wage jobs- There are a total of 60,112 jobs currently available in the local community to accommodate the 96,387-member labor-force, a deficit of 36,275 jobs. While this represents an increase of 571 jobs from the previous year, significant decreases were experienced in several industries that generally employ low-income residents. This includes agriculture, retail trade, transportation, warehousing, administrative and waste services, education, and recreation positions. Although the lack of jobs alone was concerning to local residents, the wages provided by employers was noted as being the greatest barrier to self-sufficiency and economic security in the region.*
- *Individuals lack the qualifications necessary to secure meaningful employment - Ranking as the second most influential cause of poverty, the lack of employment qualifications was primarily identified to impact residents in four distinct areas.*
 - (1) The greatest concern among community members was the lack of high school education, a barrier impacting 25,555 individuals in the region. Data indicates that individuals without a high school education are not only less likely to obtain employment, the jobs they secure pay, on average, \$9,204 less than those who complete high school.*
 - (2) The second greatest educational barrier identified by community members was the lack of soft skills. This includes leadership, teamwork, communication, work ethic, time management, problem solving, flexibility, and attitude. Although difficult to quantify, residents were concerned that these critical skills were not being passed along to younger generations by parents, which is impacting their ability to secure and maintain employment opportunities.*
 - (3) The lack of a college education was noted as the third most concerning educational barrier in the region. Although not required to secure many of the local employment opportunities, individuals who have attended college are less likely to become unemployed, remain unemployed a shorter period of time, and earn higher wages (\$3,744 per year) than those who only secure a high school diploma.*
 - (4) The fourth major educational concern in the region, as ranked by community members, was the inability to speak proper English. This barrier impacts an estimated 13,810 local residents, the majority (89%) of which were Spanish Speakers. This barrier not only impacts the ability of individuals to secure employment, those who are employed generally earn an average of \$5,600 per year less than those who speak English.*
- *Individuals lack financial management skills - Although the unemployment rate in the region has reached record lows (3.51%), an estimated 29,546 individuals residing in 8,946 households are considered to be living in poverty with a regional median income ranging from \$41,068 (Surry) to \$57,611 (Davie). When compared to the region's cost of living, it is estimated that 45,805 households (57%) do not have an adequate income to meet all of their financial obligations. These households are at risk of economic hardship, especially when they face a loss of income or unexpected expense. While families with children are most impacted due to the high cost of childcare, an estimated 26.25% of the*

total population struggles to meet their needs even without children in the home. While financial management skills are important for everyone, they are necessary for survival among individuals living in poverty.

- *The community lacks affordable childcare options - Local residents identified the lack of affordable childcare in the region as the number 4 major factor impacting progress towards self-sufficiency and economic security. Data supports the need, indicating that the region has a total of 5,168 childcare slots available to accommodate 9,722 children, leaving a deficit of 4,554 childcare slots. Overall, 27 of the region's 45 census tracts (60%) are classified as childcare deserts. To further complicate matters, residents note that nearly all of the slots are available only during daytime hours, severely limiting the ability to secure swing shift jobs which are generally known to pay higher wages.*
- *Individuals lack access to reliable transportation - Due to the lack of jobs in the service area requiring a strong majority of the local workforce (71%) to commute an average of 24-29 minutes to work, transportation is a key element for successful progress towards self-sufficiency. Ranked as the number 5 cause of poverty by community members, the U.S. Census Bureau estimates that 3,852 households in the region do not have access to a vehicle.*
- *Individuals lack the resources necessary to secure/maintain safe housing - Survey participant's ranked housing access as the single-greatest concern among community members. Data supported this need, finding an estimated 14,563 local residents to be house cost-burdened. This means that they spend more than one-third of their total household income on housing expenses alone.*
- *Individuals lack the resources necessary to obtain physical healthcare - A lack of resources to obtain physical healthcare was identified as the second leading condition of poverty in the region. With an estimated 34,805 residents reporting poor health and 23,562 reporting more than 14 days of physical distress per month, access to care is not only critical for progress toward self-sufficiency but greatly impacts the quality of a person's life. Data indicates that 24,106 local residents are currently uninsured, one-third of whom are low-income.*
- *Individuals lack the resources necessary to secure nutritional foods - An estimated 23,740 local residents were identified as being food insecure in the organization's four-county service area. While the regional rate (11.88%) is comparatively low in contrast to state (14.6%) and national (12.9%) rates, it accounts for 80.48% of all individuals living in poverty. It should also be noted that focus group participants felt these figures were low based on their observations of the community.*
- *Individuals lack the resources necessary to obtain mental healthcare - Community members ranked the lack of resources necessary to obtain mental healthcare as the fourth greatest condition of poverty. Data supported the need, identifying 24,816 local residents who suffer from frequent mental distress. Not only does this barrier impact the ability of a person to secure employment, it often leads to depression and serious suicidal thoughts. In 2018 alone, a total of 29 individuals took their own lives.*
- *Individuals lack the resources necessary to secure/maintain household utilities (F) Contributing to the housing cost barrier, local residents noted concerns with the affordability of utilities in the region. According to the United States Department of Health and Human Services (HHS), utilities are not considered affordable if they consume more than 6% of a household's income. The average energy cost in the region ranges from \$189 per month in Davie and Stokes counties to \$227 in Surry County. The average bill in Yadkin is \$210. All of these rates are higher than the national average of \$171.*

(B) Identify the segment of the population and give the number of people experiencing the problem.

When compared to the region's cost of living it is estimated that 45,805 households (57%) do not have an adequate income to meet all of their financial obligations. These households are at risk of economic hardship, especially when they face a loss of income or unexpected expenses. While families with children are most impacted due to the high cost of childcare, an estimated 26.25% of the total population struggles to meet their needs even without children in the home.

(C) Provide demographic information of those adversely effected inclusive of:

Population Change Over the past five years, the region has experienced a population decrease of 1.05% from the previous estimate of 199,761. The greatest percentage of decrease was found in Stokes County, with growth only being experienced in Davie County. It should be noted that the region has experienced 9,529 new births and 12,029 deaths during this time period.

<u>Five Year Population Trend</u> <u>(2014-2018) County</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>%</u> <u>Change</u>
Davie	41,411	41,447	41,568	41,766	41,991	+1.40%
Stokes	46,858	46,661	46,453	46,124	45,905	-2.03%
Surry	73,391	73,170	72,767	72,315	72,099	-1.76%
Yadkin	38,101	37,971	37,819	37,825	37,665	-1.14%
Region	199,761	199,249	198,607	198,030	197,660	-1.05%

(a) Gender

- **Gender** There are a total of 96,381 males and 101,279 females in the region. This is a ratio of 1.05 females for every male.
Source: U.S. Census Bureau ACS 5-Year Estimates (2014-2018)
Over the past five years, the region has experienced a slight increase in the gender gap from 1.04:1 as the population for males (-1.36%) has decreased faster than that of females (-.76%)

(b) Age

- **Age** The median age in the region ranges from 43.8 in Surry County to 46 in Stokes County, with an average of 44.72 for the entirety of the service area. This is an increase of 4.07% over the past five years. The median age and rate of increase are significantly higher than the rates for the state (38.6 years, 2.12% increase) and nation (37.9 years, 1.34% increase).

<u>Median Age Trend by County (2014-2018) Area</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>%</u> <u>Change</u>
Davie	43.4	43.8	44.3	44.6	45.0	+3.69%
Stokes	44.3	44.7	45.1	45.3	46.0	+3.84%
Surry	42.0	42.7	43.0	43.4	43.8	+4.29%
Yadkin	42.2	42.9	43.0	43.5	44.1	+4.5%

Region Avg	42.97	43.52	43.85	44.20	44.72	+4.07%
State	37.8	38.0	38.3	38.4	38.6	+2.12%
Nation	37.4	37.6	37.7	37.8	37.9	+1.34%

(c) Race/Ethnicity for the agency's service area

Ethnicity When considering people of all ages, the U.S. Census Bureau reports that there are 15,680 individuals in the local community who identify themselves as having a Hispanic background. This represents an estimated 7.93% of the local population, with the majority of the residents (92.07%) being Non-Hispanic. This is an increase of 5.1% in the Hispanic population over the past five years from the rate of 7.545% recorded in 2014. Of those who consider themselves Hispanic, a strong majority state that they are from Mexico (75.47%), with smaller populations identified from Puerto Rico (5.50%) and Cuba (1.40). The remaining balance of the Hispanic population stated they were from a country not listed on the survey.

The largest rates of Hispanic individuals were identified in Yadkin (10.9%) and Surry (10.3%) counties, with much smaller percentages in Davie (6.7%) and Stokes (2.9%) counties. When considering concentrations of Hispanic individuals for the region, the largest number can be found in Surry County (7,450), with smaller numbers in Yadkin (4,120), Davie (2,796), and Stokes (1,314).

Ethnicity by County (2018)

Source: U.S. Census Bureau ACS 5-Year Estimates (2014-2018)

A five-year analysis of the Hispanic population indicates that the largest percentage of increase occurred in Yadkin County between 2014 and 2015. Also, while a slight decrease was experienced in Surry County between 2015 and 2016, the growth recovered in 2017 to surpass the 2015 levels. Yadkin County experienced a slight decrease (20 individuals) between 2017 and 2018, with all other communities continuing to grow at a steady pace.

(d) Race/Ethnicity for the agency's service area

The primary race identified in the community is White (91.35%), with an estimated 4.25% identifying themselves as Black and 1.96% identifying as Multi-Racial. The remaining 2.44% consists of much smaller percentages of individuals classified as American Indian, Asian, Pacific Islanders, and Other Race. Although the region has experienced an overall decrease in citizenship over the past five years, the racial profile has remained relatively unchanged with notable increases only in the Pacific Islander, Asian, and Mixed-Race populations, as indicated in the chart below.

Regional Racial Profile (2018) Observations:

The region served by the organization primarily consists of individuals who classify themselves as White (91.35%) with very small populations of minorities. Although the overall population has decreased by more than 1% over the past five years, the number of Hispanic households has increased by 5.01%, slightly more than half of which are foreign-born. Among those who are foreign-born, a strong majority (67.34%) are not American citizens. The population is aging three times faster than

the national rate. This change is partially due to the relocation of families with children and partially due to an influx of older adults and seniors moving into the area from other communities, however, research suggests that a large number of “baby boomers” shifting into a new (retirement) age category has also had an impact.

(D) Explain how the persons are adversely affected.

- *Poverty is simply defined as a state or condition in which a person lacks the financial resources and essentials to maintain a minimum standard of living. This lack of income impacts the ability of a person to establish proper housing, clean water, healthy food, and medical attention. Poverty rates will be determined according to the official definition published by the United States government.*
- *An estimated 29,546 members of the region’s population, or 15.1%, report having incomes below the national poverty level. While this rate is slightly lower than the statewide rate of 15.4%, it is notably higher than the national rate of 14.1%. The highest rate in the region was found in Surry County, at 16.9%. This is 11.92% higher than the regional rate and 19.8% higher than the national rate. The lowest rates were found in Davie (13.7%) and Stokes (13.6%) counties, with Yadkin county (15.3%) demonstrating a moderate rate as compared to regional data.*
Poverty Rate by County (2014/2018)

Resource US Census Data Update (hometownlocator.com/census/)- The tables below provide updated data and demographic estimates for North Carolina as of July 1, 2023

North Carolina Data & Demographics (As of July 1, 2023)

POPULATION	
Total Population	10,765,678 (100%)
Population in Households	10,480,688 (97.4%)
Population in Families	8,403,478 (78.1%)
Population in Group Quarters ¹	284,990 (2.6%)
Population Density	221
Diversity Index ²	66

INCOME	
Median Household Income	\$64,316
Average Household Income	\$95,585
% of Income for Mortgage ⁴	25%
Per Capita Income	\$38,438
Wealth Index ⁵	83
Socioeconomic Status Index ⁶	Moderate (48.7)

HOUSING	
Total HU (Housing Units)	4,885,954 (100%)
Owner Occupied HU	2,852,254 (58.4%)
Renter Occupied HU	1,461,188 (29.9%)
Vacant Housing Units	572,512 (11.7%)
Median Home Value	\$262,944
Average Home Value	\$316,763
Housing Affordability Index ³	102

HOUSEHOLDS	
Total Households	4,313,442
Average Household Size	2.43
Family Households	2,769,389
Average Family Size	3.00

Section II: Resource Analysis (use additional sheets if necessary)

(E) Resources Available:

- a. **Agency Resources:** Domestic Violence/Sexual Assault, Senior Centers, Meals on Wheels, Head Start, Transportation, Senior Enrichment Program, Retired Seniors Volunteer Program (RSVP), Community Services Block Grant (CSBG), Weatherization, and Divorce Filing Fee Programs are our in-house resources.
- b. **Community Resources:** an extensive agency-wide list that can be accessed on our website at www.yveddi.com

(F) Resources Needed:

- a. **Agency Resources:** Additional funding from federal, state, and local funding opportunities as well as private funding sources.
- b. **Community Resources:** Additional housing sources, rural transportation, shelters, private and public employers for employment and training opportunities, youth-focused activities, economic literacy, additional affordable health options and services for the uninsured and low-income population, affordable child care for all shifts, job training, asset building programs, and credit/debt management services.

Section III: Objective and Strategy

- (G) **Objective Statement:** To provide customers with long-term Success Coaching and direct provision of services, resulting in the cost-effective empowerment of customers and graduating 30 customers with economic self-sufficiency in FY 2024-2025 - ending the three (3) year period June 30, 2026, graduating a total of 30 customers

Strategies for Objective:

Strategies for Objective:

- * To provide Success Coaching to low-income families along with a direct provision of services that result in an increase in family income to assist families to move above the poverty level.
- * To provide long-term Success Coaching to families along with a direct provision of services that result in job placement, job retention, job stability, wage progression, family income increase, improvement in educational levels, economic literacy training, asset building, stable and affordable housing, understanding available healthcare coverage options, and basic independent living skills learned through programs and workshops such as Getting Ahead in a Just Getting by World.
- * Collaboration of services with local human service agencies in order to provide needed assistance, maximize resources, minimize gaps in services, and prevent duplication of services.
- * Promote a better community understanding regarding the circumstances of vulnerable populations through presentations and the need to remove barriers affecting the unemployed and underemployed in their efforts to attain skills to enable them to compete in the job market.
- * To assist families in poverty to move along a continuum from homelessness, unemployment, and/or working poor to a level of economic self-sufficiency (as defined by the Federal Poverty Guidelines) including standard, affordable housing.
- * To provide opportunities for educational training in career areas leading to employment paying a living wage and hopefully providing healthcare coverage for adults and children. YVEDDI believes that knowledge is the key to empowerment and that education is the key to knowledge.
- * To provide self-sufficiency and transitional housing services to low-income families who are being significantly affected by welfare reform initiatives, who are not homeless, but present significant housing needs, and who are being affected by the present economic recession.
- * To provide economic literacy training and associated programs with the goals of:
 1. Changing savings/spending habits
 2. Creating a realistic family budget
 3. Illustrating the need for increases in earned income levels
 4. Promoting savings, investment, wealth accumulation, and asset building, rather than spending and consumption, as a way to increase net worth
 5. Promoting asset accumulation as a new tool for combating generational poverty and encouraging the use of the Money Smart link on our website to educate themselves about budgeting and saving money as a key to self-sufficiency
- * To assist customers in improving their overall level of social functioning and to provide an opportunity for customers to invest their social capital into the community.

- * To continue to explore and understand the root causes of poverty as the face of poverty changes in an ever-increasing complex society.

Section IV: Results Oriented Management and Accountability Cycle (use additional sheets if necessary)

Organizational Standard 4.3 requires that an agency's strategic plan and Community Action Plan document the continuous use of the ROMA cycle and use the services of a ROMA trainer.

(H) Community Needs Assessment: Please summarize the primary needs of your community as determined through the Community Needs Assessment, and explain which of those are Family, Agency, or Community Needs, and why.

- Families/Individuals lack access to living wage jobs. **Family Need**
- Families/Individuals lack Employment Qualifications – job skills/training needed to obtain living wage jobs. **Family Need**
- Families/Individuals lack transportation and/or access to transportation. **Family Need**
- Families/Individuals lack access to safe, affordable childcare. **Community Need**
- Families/Individuals need safe affordable housing. **Family Need**
- Families/Individuals lack Health Insurance and/or access to needed health services. **Family Need**

(I) Achievement of Results and Evaluation: Please discuss your agency's achievement of results from last year. What were the successes and why were those areas successful? What areas did not meet targets or expectations and why were those areas not as successful? What Improvements or changes will be made for this year's work plan to achieve desired results and better meet the needs of the community?

Achievements – We continue to strive to develop methods for delivering services across the agency in ways that best meet the needs of those we serve. The agency with its many programs has reviewed the previous year's challenges and continued to adapt to provide services while keeping as healthy a work environment as possible.

Our Head Start Programs are operating and have been providing educational and nutritional support to the children as well as resources for the adults. Our Senior Services/Congregate Meal Sites/Meals on Wheels and RSVP Programs have been keeping the seniors engaged throughout the pandemic with online enrichment opportunities as well as limited on-site activities. Meals continue to be provided to those in need with enrichment activity packets. Our Domestic Violence/Sexual Assault Program has continued to meet the needs as they arise. As well as working with our community partners to find additional resources as needed.

Our Transportation Program has continued to provide transportation to those in need. The Weatherization Program continues to adapt and provide services to those needing assistance through the NC WAP Program, BCBS funding, and Duke Energy funding. CSBG has continued to provide services to CSBG customers while utilizing resources from our many community partners.

CSBG was able to exceed several of our targets. We were excited to have more individuals than anticipated obtain employment, complete educational/training programs, and receive employment support. We were close with the number to rise above the poverty level.

With the continual continuing economic downturn, rising prices, and the challenges of changing Federal Poverty Guidelines, it is difficult to give educated projections. We also have the challenge that not all of the counties we serve have equal resources. We had targeted a greater number to be served than achieved with the following:

- We anticipated that we would see many more families needing to secure standardized housing. We did fall short of this projection. Two circumstances can affect this target: 1, families continue to maintain their housing, and 2. Affordable standardized housing was not available.
- We anticipated that we would see many more families needing emergency assistance. However, we experienced that many individuals working with their success coaches were able to plan properly to meet financial obligations. Also, the CARES funding did give opportunity for individuals to be abreast of their expenses.
- We anticipated that we would see many more families needing educational supports. With many certificate programs as well as other types of classes being offered online, it has reduced some of the fuel assistance we otherwise would have assisted with.

(J) Please name the ROMA trainer who provided services used in developing this community Action Plan and describe what specific services were provided.

Shawn Howell, LLC, ROMA Master Trainer – conducted the Community Needs Assessment.

- Elisha Harris, CSBG Success Coach, ROMA Trainer, and ROMA Implementer, provided program support.
- Dawn Cheek, CSBG Director, ROMA Implementer, and Six Sigma Green Belt Certified, provided agency support as well as CSBG program support.

UNEMPLOYMENT RATES for our Four County Area via county Ychart.com

County	Rate	Date
Davie	3.20%	10-2023
Surry	3.20%	10-2023
Stokes	3.40%	10-2023
Yadkin	3.20%	10-2023

**Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
One-Year Work Program
OEO Form 212**

Section I: Project Identification				
1. Project Name:	Self-Sufficiency Program			
2. Mission Statement:	CSBG – To build self-sufficiency for under-resourced individuals and families through coaching, mentoring, and community partnerships. YVEDDI – Dedicated to improving the lives of individuals and families in Davie, Stokes, Surry, and Yadkin Counties through a variety of programs and partnerships to build stronger communities.			
4. Objective Statement:	To provide customers with long-term Success Coaching and direct provision of services, resulting in the cost-effective empowerment of 30 customers and graduating customers with economic self-sufficiency in FY 2024-2025 – ending the three-year period June 30, 2026, graduating a total of 30 customers.			
5. Project Period:	July 1, 2024 to June 30, 2025 2 of 3 years			
6. CSBG Funds Requested for this Project:	July 1, 2024	To	June 30, 2025	\$ 379,490
7. Total Number Expected to Be Served:	60			
a. Expected Number of New Clients	30			
b. Expected Number of Carryover Clients	30			

**One-Year Work Program
OEO Form 212 (continued)**

Section II: One-Year CSBG Program Objective and Activities				
Identified Problem	Service or Activity	Outcome Expected	NPIs (List all NPIs applicable to activity)	Position Title(s)
1-Employment – The availability of jobs providing a living wage.	Referrals to appropriate agencies and encouragement to take certification courses through Ed2Go online.	Family/Individual has living wage job.	FNPI1e-1g	Success Coach
2-Families/Individuals lack Employment Qualifications-job skills/training needed to obtain living wage jobs.	Pre-employment skills certification, GED, learning soft skills	Family/Individual has employment qualifications to obtain living wage jobs.	FNPI 2g-j, 7a	Success Coach
3-Families/Individuals lack transportation and/or access to transportation	Fuel assistance Rides on YVEDDI transportation	Customers will have access to reliable transportation so they can attend class or go to work	FNPI7	Success Coach
4-Families/Individuals lack access to safe and affordable childcare.	Make referrals to Head Start with families with age-appropriate childcare, locating and assisting with children and cost, referrals to DSS, Work First	Families/Individuals have safe and affordable childcare.	FNPI7	Success Coach
5 Families/Individuals	Referrals to appropriate	Families/Individuals have safe and	FNPI4a-f	Success Coach

need safe and affordable housing	community rental agencies, homeless shelters. Monetary assistance to obtain housing	affordable housing		
6- Families/Individuals lack Health Insurance and/or access to needed health services	Referrals to DSS to apply for Medicaid for qualifying families, explore affordable healthcare options through the marketplace	Families/Individuals have health insurance and access to health services.	FNPI5b-c, 5g, FNPI7a	Success Coach

**One-Year Work Program
OEO Form 212 (continued)**

Section III: Program Administration and Operations					
Administration, Services, Operations Outcome Expected	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
Obtain and/or update detailed case record information for all new customers in order to determine eligibility and needs utilizing an achievement matrix which helps identify candidates for success based on their score. Social security numbers and other necessary identification will be verified during Orientation/Intake, and redacted from the files after use. If factual information during verification changes the information first provided by customers, changes will be made by drawing a line through the incorrect information. The staff person will initial the change, and the correct information will be documented in the customer's file	CSBG Director Lead Success Coach Success Coach	5	15 (10)	25 (10)	30 (5)
Examine and evaluate individual customer situation to determine services needed to promote self-sufficiency: ▪ Customer orientation ▪ Customer interview utilizing the Achievement Matrix ▪ Current situation assessment (economic, emotional, housing, educational, etc.) ▪ Verification of information ▪ Consultation with professionals in allied fields and agencies ▪ Review of services needed to address needs (housing, health services, employment, economic literacy training, budget counseling, transportation, childcare, substance abuse counseling, education or training, homeownership possibilities, etc.) ▪ Assist customer in selection of best options available ▪ Use the Bridges out of Poverty framework to assist in obtaining skills to change the poverty mindset	Lead Success Coach Success Coach	5	15 (10)	25 (10)	30 (5)
Develop a Success Plan, including short-term objectives and long-term goals with each new customer to provide comprehensive services for enabling self-sufficiency.	Lead Success Coach Success Coach	30	40 (10)	50 (10)	60 (10)

Formulate or update service plans with assessments as necessary with each customer (Maximum = every 90 days)	Lead Success Coach Success Coach	30	40 (10)	50 (10)	60 (10)
Accumulate detailed information through the maintenance of a case file system and a computerized customer assistance record-keeping software package (AR4CA). AR4CA stores and retrieves information for daily, weekly, and monthly use. Conducting internal controls such as quarterly file reviews and Lead Coach mentoring to new staff.	CSBG Director, Success Coach Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Develop and document a job enhancement service plan emphasizing job development, job search, job placement, wage progression, healthcare coverage, future training, job retention, educational upgrade, transportation, nutritional classes, and childcare.	CSBG Director, Success Coach Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Coordinate with other community agencies and groups in order to initiate institutional changes that benefit low-income residents of Davie, Stokes, Surry, and Yadkin Counties through information sharing, community problem solving, planning, advocacy, conducting Bridges Out of Poverty Informational Presentations and Poverty Simulations to educate the community about poverty.	CSBG Director, Success Coach Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Utilizing internal controls with a Lead Success Coach who assists other staff and conducts file reviews quarterly. Success Plans are updated every 90 days through assessments – evaluating the progress of each customer for continuation in the program. The entire staff will be reviewing each case to determine income eligibility and other factors before acceptance.	CSBG Director, and Success Coach Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Coordinate services and provide assistance as appropriate with the gathering of demographic data, such as the US Census, and use of reputable statistical websites online such as Community Action Partnership – Community Commons, in order to substantiate customer needs and population characteristics.	CSBG Director, Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Staff cases with other agencies providing services as appropriate. These joint case staffing will assist in the activation of all available community resources in assisting families in becoming self-sufficient. Our Success Coaches will serve as the leaders for joint case staffing with agencies providing human services in Davie, Stokes, Surry, and Yadkin Counties.	Success Coach Lead Success Coach CSBG Director	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25

YVEDDI CSBG assists in arranging human services in Davie, Stokes, Surry, and Yadkin Counties to ensure that low-income and/or homeless households receive the most appropriate services possible, to prevent any household from falling through a gap in services, and to prevent duplication of services in the community. This service is designed to increase accessibility to human services in a community that is rich in resources. These activities are carried out through an information and referral process, which includes a formal referral form, a release of information, and a phone contact to investigate the outcome of the referral. This process saves YVEDDI's resources by having the human service agency receive the referral to activate its resources to serve the customer.	CSBG Director, Success Coach, and Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Maintain professional staff to provide orientation, intake, needs assessment, Success Coaching, separation, and computer tracking (follow-up) services with the Lead Success Coach assisting the Director and guiding the other Success Coach (s) in providing the best service possible to our customers and community.	CSBG Director, Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Provide staff training, learning good case management techniques with training provided by NCCAA, University certifications, and continued team concept development for all staff on an ongoing basis. Our CSBG Staff are provided with the opportunity to complete the Certified Case Manager training through the University of Delaware and Southeastern University. We have one ROMA Trainer and Implementer.	CSBG Director, Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Require customers to utilize the Money Smart link on the YVEDDI website which will help customers to learn to build wealth through asset accumulation. This will utilize and train the psychology of investment rather than consumption.	Success Coach Lead Success Coach CSBG Director	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Conduct annual evaluations of services and staff with the addition of self-evaluations. This evaluation will include data from monthly, quarterly and semi-annual reviews. Keep the Board advised of our program organizational standards, outcome	Board of Directors, Executive Director, CSBG Director	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25

performances, self-evaluations, community needs assessments, and risk assessments.					
Ensure that ROMA goals are met, including the capturing, analyzing, and publicizing of performance outcome results and management accountability. Utilizing the ROMA cycle on a daily basis.	CSBG Director, Success Coach, and Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
Implementation of the AR4CA system of CSBG data with continuing monitoring and tracking of data to ensure the accuracy of reports and to be sure that AR4CA data accurately matches Case File data.	CSBG Director, and Lead Success Coach	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25
YVEDDI will continue to provide CSBG-funded staff with the opportunity to attend available training activities to assist them in maximizing their Success Coaching potential to provide Self-Sufficiency customers with high-quality services.	CSBG Director Board	7/1/24 9/30/24	10/1/24 12/31/24	1/1/25 3/31/25	4/1/25 6/30/25

**Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

9. Use the tables below to enter your agency's targeted outcome results. The performance measures will be included in the agency's CSBG contract.

All CSBG grantees operating self-sufficiency projects are required to enter program targets in Table 1. Please refer to *Performance Measures and Outcomes Definitions* on page 7 of the Fiscal Year 2024-25 CSBG Application Instructions. If your agency operates more than one project, you will also need to complete Table 2 on the following page and also enter specific program targets. There should be one table of outcome measures per project.

Table 1 Outcome Measures for Project 1 (enter project name)	
Measure	Expected to Achieve the Outcome in Reporting Period (Target)
The number of participant families served.	60
The number of low-income participant families rising above the poverty level.	8
The number of participant families obtaining employment.	10
The number of participant families who are employed and obtain better employment.	4
The number of jobs with medical benefits obtained.	2
The number of participant families completing education/training programs.	6
The number of participant families securing standard housing.	3
The number of participant families provided emergency assistance.	5
The number of participant families provided employment supports.	30
The number of participant families provided educational supports.	15
The average change in the annual income per participant family experiencing a change.	This measure does not require a target but must be reported.
The average wage rate of employed participant families.	This measure does not require a target but must be reported.

Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
One-Year Work Program
OEO Form 212 (continued)

Table 2 Outcome Measures for Project 2 (enter project name)	
Measure	Expected to Achieve the Outcome in Reporting Period (Target)
The number of participant families served.	

**Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

CSBG Expenditure by Service Category					
A.2. CSBG Expenditures Domains	Target CSBG Funds	Actual Q1	Actual Q2	Actual Q3	Final
A.2a. Employment					
A.2b. Education and Cognitive Development					
A.2c. Income, Infrastructure, and Asset Building					
A.2d. Housing					
A.2e. Health and Social/Behavioral Development (<i>includes nutrition</i>)					
A.2f. Civic Engagement and Community Involvement					
A.2g. Services Supporting Multiple Domains					
A.2h. Linkages (<i>e.g. partnerships that support multiple domains</i>)					
A.2i. Agency Capacity Building					
A.2j. Other (<i>e.g. emergency management/disaster relief</i>)					
A.2k. Total CSBG Expenditures (auto calculated)					

**Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

10. For Community Action Agencies that serve multiple counties, provide a breakdown of the expected *number of persons served* in each designated county in the table below. Show the total *number of persons served* in the table.

Number of Families to be Served Per County											
Agency Name: Yadkin Valley Economic Development District Inc.											
Project Name: Self-Sufficiency											
County	Davie	Stokes	Surry	Yadkin							Total
Total Planned	14	12	26	8							60
Project Name:											
County											Total
Total Planned											

**Community Services Block Grant Program
Fiscal Year 2024-25 Application for Funding
Monitoring, Assessment and Evaluation Plan**

1. Describe the role and responsibilities of the following in the assessment and evaluation of agency programs.

- a. **Board of Directors:** The YVEDDI Board of Directors has fiduciary responsibility for the review and final adoption of all policies, to determine the organization's mission and purpose, to select the executive director, to support the executive director and review his/her performance, to ensure effective organization planning, to ensure adequate resources, to manage resources effectively, to determine and monitor the organization's programs and services, to enhance the organization's public image, to serve as a court of appeals, and to assess its own performance.
- b. **Low-Income Community:** The low-income community comprises one-third (1/3) of our Board membership and are democratically elected because of their direct knowledge of poverty or having worked with low-income individuals/families in some capacity. Efforts are taken to ensure that concerns and issues of the low-income community are included and made part of this plan through community forums and by participating in the assessment process.
- c. **Program Participants:** Program customers are encouraged to participate by completing assessments and surveys, providing input on matters of importance as a customer, and helping to identify individual barriers that prevent them from reaching their goal of self-sufficiency. Staff members provide assessment and evaluation comments, and discuss program performance at monthly staff meetings. YVEDDI management emphasizes an open-door policy of discussion, and customer comments through surveys and discussions – all are an integral part of the current three-year planning cycle.
- d. **Others:** The Executive Director has primary responsibilities for the following activities for assessment and evaluation:
 - Coordination of the assessment process and strategic planning in consultation with the board of directors and a ROMA trainer.
 - Staff assignments, decisions, guidance, and follow-up
 - Assessment and evaluation analysis and interpretation
 - Response to project assessment and evaluation reports with the development of improvement plans.

CSBG Program Staff: Program staff responsibilities are delegated and directed by the CSBG Director and will include, but not be limited to, the following activities:

- Compilation of project data and utilization of the ROMA cycle of assessment, planning implementation, achievement of results, and evaluation.
- Gathering, interpretation, and analysis of non-project data and assessments
- Preparation of reports, suggestions, comments, and recommendations
- Development of the Application
- Public Hearings

Carrying out special assignments such as Mentoring ROMA candidates, Bridges Out of Poverty Presentations, Poverty Simulations, assisting with the IS Report, and the Lead Success Coach mentoring new staff and monitoring files, attending learning sessions for Organizational Standards

2. Describe the systematic approach for collecting, analyzing, and reporting customer satisfaction data to the Board of Directors.

We developed a web-based survey to improve ongoing access for clientele. Survey data is aggregated and incorporated into the annual community assessment. Results of the Agency Self-Assessment, Risk Assessment, and the Community Assessment will direct the development of short and long-term goals and strategic plans designed to meet the needs of the community and improve service delivery.

3. Describe how administrative policies and procedures are monitored by the Board of Directors.

- Basic function of the system
- Management practices regulated by the system
- Roles and responsibility assignments (Board, committees, community groups, low-income representatives, staff, etc.)
- Corrective action procedure
- Record keeping and documentation
- Schedules and deadlines
- Reviewing the overall management system in terms of its effectiveness and relevance
- Review the internal communications system to determine whether it provides for clear and precise channels for the flow of information
- Review personnel procedures to determine whether they are sufficiently comprehensive and the extent to which they are followed
- Review of Program Outcome Measures using the ROMA Cycle to evaluate, assess, and monitor validity, reliability, objectivity, and successful completion of program goals and objectives.

Administrative policies and procedures are monitored through committees including the Finance Committee, Personnel Committee, Planning and Evaluation Committee. Committee reports and associated minutes are then shared with the full Board. If changes are recommended, these changes will be discussed, accepted, or denied, and voted on by the full Board. The Board will review administrative policies and procedures every three years. If individual circumstances arise, suggesting the need for immediate change, potential changes will be discussed at the next scheduled Board meeting, or a “called” Board meeting will occur if a crisis exists. The Board may also contract with outside experts for assistance if necessary.

4. Describe how the Board acts on monitoring, assessment, and evaluation reports.

The Program staff will monitor program activities, and achievements, and give periodic reports on all program activities to the Planning and Evaluation Committee and the Board, not just problem areas, making recommendations for corrective action (Program Improvement Plans) as appropriate. Monitoring of the administrative and management functions will be a part of the activities reviewed. The results of evaluations and impact studies will be used in future planning efforts. When the evaluation indicates a need for immediate corrective action, such action will be taken upon direction from the full Board after adequate review by the appropriate committees. The corrective action taken by the Board may result in amended policies and procedures or amended plans and projects as appropriate. The staff will be involved upon request in developing possible solutions or modifications. Recommendations will be submitted to the full Board for approval. After Board approval, the Board will ensure that the recommendations or modifications are implemented and the plans and projects may be amended as appropriate.

5. Describe the Board's procedure for conducting the agency self-evaluation.

Per our Community Action Plan, we conduct a board and agency assessment every year.

Agency Self-Assessment

We utilize the CSBG Organizational Standards as our agency self-assessment.

Agency Risk Assessment

The tool used for the agency assessment is the CAP Organizational Standards Self-Assessment Tool which was conducted by staff and reviewed and approved by the full board. Findings were incorporated into the Agency's Strategic Plan for follow-up.

The Board Assessment

The agency developed a board self-evaluation tool to identify how governance is working at our agency. Tools are given to each board member for completion and results are aggregated. Plans for improvements are developed to include training or systems revisions as applicable.

Financial Risk Assessment

Our Finance Director conducts a financial risk assessment to check for any needed policy or systems revisions as well as training.

6. Summarize the results of the Board's most recent self-evaluation. Describe how the information has been or will be used to develop the agency's next Strategy for Eliminating Poverty. Indicate the timeframe and planned activities for the next evaluation.

The YVEDDI Board of Directors completed its last Self-Evaluation in the summer of 2022. Results were compiled by a board member who shared them with the full Board at our October 27, 2022 meeting. Our Executive Director will work with our Planning and Evaluation Committee to address areas for growth. Action is to be determined. We currently have an active Strategic Plan that will expire in 2024.

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Brian Barnett, County Manager

ITEM TYPE: Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Memo of Agreement for Cooperative Extension Services

SUGGESTED ACTION:

ATTACHMENTS:
[Memo of Agreement 10.20.2023,rmw,10-23-2023.pdf](#)

NC STATE

EXTENSION

Memorandum of Agreement

Between
The Board of County Commissioners
Davie County
And
North Carolina State University

Preamble

North Carolina State Extension (NC State Extension) was established as a part of the College of Agriculture and Life Sciences of North Carolina State University (NCSU) by federal and state legislation for the specific purpose of "extending" the educational services of the University to the people of the state, on subjects related to agriculture and natural resources, family and consumer sciences, 4-H youth development, and community and rural development. The laws creating the Cooperative Extension Service were specifically designed to assure that the findings of research in these areas are communicated to the people of the State.

Under the Federal Appropriations Act of 1972, funds were provided to the 1862 land-grant universities (including NCSU) to enhance the extension outreach of the 1890 universities, which included North Carolina A & T State University (NCA&T). The Food and Agriculture Act of 1977 further stipulated that these funds be appropriated directly to the 1890 institutions, and formalized the North Carolina Cooperative Extension Program as an official part of the School of Agriculture and Environmental Sciences at NCA&T.

North Carolina Cooperative Extension (Cooperative Extension) provides the opportunity for North Carolina State Extension and North Carolina A & T Extension to work together to better serve the people of the State through the delivery of locally relevant programs, education and expertise.

The legislation further provided for a cooperative relationship among three levels of government – federal, state, and county – to ensure that the needs of all three levels are addressed. The primary purpose of Cooperative Extension is to provide the people of North Carolina with the most current and relevant unbiased research-based information – particularly that which is related to strengthening the economy through profitable, sustainable and safe food, forest and green industry systems; protecting the environment and natural resources; and empowering youth and families to lead healthier lives and become community leaders. These purposes are furthered by Cooperative Extension employees who are charged with carrying out the extension education programs of the universities and the U.S. Department of Agriculture.

Cooperative Extension has sufficient flexibility to permit attention to the special problems, needs, and interests of the citizens and leadership in each county. Therefore, the programmatic, personnel, and funding complement reflects the unique needs of each county. County Advisory Councils are consulted on a regular basis to assist in prioritizing the county educational program content. Program clientele or recipients of services include individuals, families, communities, municipalities, agricultural and seafood processing and marketing firms, other businesses and certain organizations. These services are delivered to adults and youth in both urban and rural settings.

To assure that educational programs offered by Cooperative Extension meet the needs of the local clientele, it is important that both elected and appointed decision makers at each level of government understand their respective responsibilities and relationships in conducting and funding this work. To this end, this Memorandum of Agreement will detail the individual relationships and mutually agreed-upon responsibilities of NCSU and each county or tribal community that signs this Memorandum of Agreement.

Part I.
NC State Extension will:

1. Establish minimum requirements and qualifications for employment in Cooperative Extension work.
2. Receive and examine applications for employment.
3. Interview and screen applicants to determine their qualifications and availability.
4. Consult with the Board of County Commissioners, or the County Manager as designee, regarding qualified applicants for appointment to vacant or new Cooperative Extension positions.
5. Consult with the Board of County Commissioners, or the County Manager as designee, regarding the salaries and salary splits of all Cooperative Extension employees, including but not limited to County Extension Directors, Extension Agents, and County Operations Support Staff (COSS).
6. Prepare and submit an annual budget to the Board of County Commissioners, or the County Manager as designee, for securing the county's share of funds for salaries and operating expenses each based on the state fiscal year.
7. Provide funds for official travel necessary to conduct Cooperative Extension work and postage funds, to the extent that funds are available, and for purposes authorized by state and federal policies.
8. Accept responsibility and provide the leadership for administration and supervision of Cooperative Extension programs and personnel, including compliance with affirmative action and equal employment opportunity requirements. NC State will investigate all cases of discrimination, harassment, or retaliation following applicable NC State policies.
9. Investigate and manage all employee relations issues related to NC State employees housed in local offices. We will work collaboratively with local county government and NC A&T University when an issue impacts their employees.
10. Develop and administer a personnel management plan that will provide the annual review of each employee's performance, counseling for job improvement where needed, and periodic county program reviews.
11. Provide a staff of specialists to train agents in current technology and other changes affecting agriculture and natural resources, family and consumer sciences, 4-H and youth, and community and rural development, and to otherwise assist them in conducting work in these areas.

12. Provide Cooperative Extension professionals with training programs as needed to maintain effective program delivery.
13. Seek regular input from the County and maintain a County Advisory Leadership System to ensure that county Cooperative Extension programs are based on the particular needs of people in their respective county.
14. Prepare and submit a "Report to the People" to the Board of Commissioners, or the County Manager as designee, at least annually, informing the Board or Manager of Cooperative Extension programs and work accomplished.

Part II.
The Board of County Commissioners will:

1. Provide the County's share of salaries and benefits for Cooperative Extension personnel.
2. Comply with North Carolina's Workers Compensation Act, N.C. General Statute § 97-2(2).
3. Provide offices, equipment, utilities, telephones, office supplies, instructional materials and other items needed for efficient operation of the County Extension Center and its programs; and comply with the accessibility provisions of the Americans with Disabilities Act.
4. Review and consider the annual budget request from NCSU, and take appropriate action by July 1 of each fiscal year.
5. Provide regular input to the District and County Extension Directors on the particular needs of people in their respective county to help ensure that county Cooperative Extension programs are based on specific needs and meet county programming plans.

Part III.
NC State Extension and the Board of County Commissioners mutually agree:

1. That all county Cooperative Extension employment appointments and separations will be made in consultation between NCSU and the Board of County Commissioners, or the County Manager as designee, and that no official action related to such appointments or separations will be taken by either party regarding appointment or separation prior to discussion of the matter with the other party.
2. That the Board of County Commissioners and NCSU shall each be responsible for compliance with applicable laws and regulations relating to their respective operations.
3. To cooperate in implementing affirmative action and equal employment opportunity plans of NCSU.

4. The parties will work together to maintain an environment of high-quality cooperation and services. At the request of any party, a meeting or conference will promptly be held between the Parties' representatives to resolve any problems or develop any improvements.
5. That the policies established by the State of North Carolina under N.C. General Statute §126 and followed by the UNC System for SHRA employees be used in the granting and administration of leave related to the earning rates, transfer policies, payout computation and timing, and administration of vacation, sick, civil, community involvement, military, Family and Medical Leave, Family Illness Leave, leaves of absence, and other approved leave programs for Cooperative Extension personnel.
6. That Cooperative Extension employees will follow county policies relative to office hours, office closings for inclement weather, and holidays, and for the management and use of county property.
7. That personnel procedures are as follows:

(a) Establishing Accounts to Operationalize the Payroll Process.

- i. To operationalize the payroll arrangement, NCSU will establish a Trust Fund Account for the County at NCSU that will serve as the vehicle for the transfer of funds from the County to NCSU for use in paying the county's agreed-upon share of salary and benefits for Cooperative Extension personnel.
- ii. Procedure for Providing Funds to the Account. A State Treasurer's Electronic Payment System (STEPS) form will be completed and the original submitted to the Assistant Extension Director of HR and Operational Strategy via the appropriate District Extension Director. The County Finance Officer, or the designated County representative, will receive notification from the NCSU College of Agriculture and Life Sciences HR Office prior to the University's payroll date, generally the last working day of each month, advising the amount due for the current payroll. Within 5 business days following the payday, the respective University will draft against the County's established trust account in the amount communicated.
- iii. Administration of the Account. The trust account will be maintained in accordance with the respective NCSU accounting policies and procedures. The trust account will be audited and reconciled by the NCSU College of Agriculture and Life Sciences Business Office to ensure the month-end account balance remains zero.

(b) Employee Benefits.

- i. Retirement Benefits. All Extension Personnel will participate solely in either the North Carolina Teachers and State Employees Retirement System (TSERS) and accompanying North Carolina Disability Income Plan, or the Optional Retirement Plan, based on eligibility criteria established by the State. They will be eligible solely for respective NCSU employee benefits for which they qualify based on their appointment and FTE, and former federal appointees will maintain federal benefits, the employer-paid parts of which will be paid for solely by NCSU.

(c) Taxes and Fringe Benefits.

i. The County will be responsible for providing their proportional share of fringe benefits for all Cooperative Extension personnel, including but not limited to the following:

1. Employer contributions to all applicable Federal and State taxes.
2. Employer contribution to TSERs per N.C. General Statute §135, or to ORP per N.C. General Statute §135-5.1.
3. Employer contribution to the Health Insurance matching charges per N.C. General Statute §135.

(d) Workers' Compensation will be administered pursuant to N.C. General Statute §97-2(2). The County will provide full and direct coverage for those employees subject to the County workers' compensation insurance within the county insurance program. Employees for whom the County will maintain workers' compensation coverage are the following:

1. All administrative and any other positions designated as County Operations Support Staff (COSS); and
 - a. All Program Assistants/Associates who are not funded by directly allocated federal funds such as EFNEP, or Program Assistants/Associates who are paid in part by EFNEP funds but which account for less than 50% funding.
 - b. NCSU will provide full and direct coverage for their respective Cooperative Extension employees subject to NCSU's workers' compensation insurance. Cooperative Extension employees for whom NCSU will maintain workers' compensation coverage are the following:
 - i. All County Extension Directors and Extension Agents; and
 - ii. All Program Assistants or Associates who are funded by directly allocated federal funds such as EFNEP, or Programs Assistants or Associates who are paid in part by EFNEP funds at equal to or more than 50% funding.

(e) Employee Separation

1. NCSU will process severance pay for reductions-in-force (RIFs) as delineated in the COSS Employee Handbook for County Operations Support Staff (COSS).
2. Upon an employee's separation, the County will pay out its proportional share of annual/vacation leave, up to a maximum of 240 hours per the OSHR and/or UNC System guidelines, and any applicable bonus leave balance.

3. The County will pay its proportional share of state longevity for COSS employees upon an employee's service anniversary date.
4. The County will pay out its proportional share of any accrued "extra" time (hour-for-hour) or overtime (1.5 hour-for-hour) to Cooperative Extension employees that are subject to Fair Labor Standards Act or the North Carolina Wage and Hour Act upon an employee's earning anniversary date or as due to the employee at the time of separation.

(f) Optional County-paid Salary Increases or Bonuses to Cooperative Extension Personnel.

At their discretion, Counties may award additional permanent salary increases or one-time pay awards ("bonuses") to Cooperative Extension personnel. If such salary increases or bonuses are proposed by the County under the "non-lock-in" payroll arrangement, they must be communicated to the appropriate District Extension Director's office no later than the first day of any month in which the proposed increase or bonus is to be applied. Increases must be entered in the current fiscal year.

(g) Lock-In Provision

This section describes the preferred arrangement to support the salary agreement between the County and NCSU for Extension personnel. All counties will participate in the Lock-In provision unless designated on an Opt-Out Addendum the arrangement as Non Lock-In.

1. Salary Adjustments for Extension Employees under the Lock-In Provision. The full compensation plan for university employees as approved by the General Assembly and implemented by the Office of the President, University of North Carolina System, will serve as the basis for all compensation adjustments and both the County and NCSU will adhere to the plan's effective dates and implementation instructions. Cooperative Extension personnel receiving salary from grant funds will be governed by the terms and conditions of the applicable grant within the scope and applicability of NCSU personnel policies governing grants. These compensation components include, but are not limited to:

Across-the-board adjustments,
Cost-of-living adjustments (COLA),
Merit adjustments,
Bonuses (in any form conveyed), and
Promotion, classification, market, or equity adjustments.

Salary and Benefits. Salaries and benefits, as delineated above in 7(a-e), will be split according to the hiring agreement and will be detailed on an attached addendum. As both parties may provide increases, these percentages will change slightly from the original hire percentage.

2. County Increases in the Lock-In Provision

The County may elect to include NCSU employees in County increases, bonuses, etc. at any time. See 7(f) for more information on submitting county increases. Lock-In Provision indicates that all State adjustments will be honored and automatically drafted, but the County is not limited to just the State increases in this agreement.

Part IV.

DURATION, AMENDMENT, AND TERMINATION

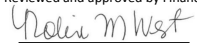
The parties will conduct a periodic review of this collaboration and responsibilities to determine and evaluate whether the parties are achieving the goals and accomplishing the responsibilities activities herein. No amendment of the terms of this Agreement will be effective unless made in writing and signed by each Party's authorized signatory.

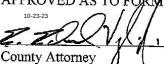
Signatures of the persons below authorize execution of this document, effective as of July 1, 2023, and continuing year-to-year, unless otherwise terminated in writing by either party under written notification to the other party no less than one-hundred twenty (120) days prior to the proposed termination date. Termination of this Memorandum of Agreement shall have the effect of terminating the Cooperative Extension activities and programs in the County.

Signature: _____

Date: _____

Chairperson or Designee Board of County Commissioners
Davie County

Reviewed and approved by Finance

Davie County CFO

APPROVED AS TO FORM
10-23-23

County Attorney

Signature: _____

Date: _____

Director
North Carolina Cooperative Extension
North Carolina State University

Signature: _____

Date: _____

Dean
College of Agriculture and Life Sciences
North Carolina State University

Addendum Attached Executed _____

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Jamon Gaddy, Tax Administration

ITEM TYPE: Tax Report

AGENDA SECTION: Consent Agenda - Chair Jones

SUBJECT: Tax Report, Releases, Refunds

SUGGESTED ACTION:

ATTACHMENTS:
[BOCC_TaxReports_20231106.pdf](#)

COMMISSIONER APPROVAL OF RELEASES & REFUNDS

PROCESSED: September 15, 2023 Thru October 14, 2023

REGULAR RELEASES

MOTOR VEHICLE	\$0.00
REAL & PERSONAL	\$1,180.47
EMS	\$6,133.14
TOTALS	\$7,313.61

REGULAR REFUNDS

MOTOR VEHICLE	\$0.00
REAL & PERSONAL	\$0.00
TOTALS	\$0.00

COUNTY GRAND TOTAL \$7,313.61



MARK JONES
CHAIRMAN OF THE BOARD
DAVIE COUNTY BOARD OF COMMISSIONERS

PROCESSED: October 2023

NEW MOTOR VEHICLE SYSTEM REFUNDS (VTS)

MOTOR VEHICLE NCVTS	\$1,134.68
ADVANCE FIRE	\$0.00
TOTAL	\$1,134.68



Karen E. Logan

RUN DATE: 10/16/2023 8:57 AM

REGULAR RELEASE REPORT 9/15/2023-10/14/2023
Davie County

PARAMETERS SELECTED FOR RELEASES REPORT:

TRANSACTION DATE/TIME RANGE: 9/15/2023 - 10/14/2023

PAYMENT DATE RANGE:

BILL TYPE: Regular

BILL YEAR/NUMBER RANGE:

PRINT TOTALS ONLY: No

USER/OPERATOR:

EXCLUDE USERS/OPERATORS: ,R2

SORT ORDER: Name

REPORT TITLE: REGULAR RELEASE REPORT

9/15/2023-10/14/2023

DISTRICT/TYPE/FEE:

BATCH MONTH RANGE:

BATCH YEAR RANGE:

BATCH REAL TIME:

INCLUDE ONLY THOSE WITH RELEASE NUMBERS: No

RUN DATE: 10/16/2023 8:57 AM

REGULAR RELEASE REPORT 9/15/2023-10/14/2023
Davie County

RUN DATE: 10/16/2023 8:57 AM

REGULAR RELEASE REPORT 9/15/2023-10/14/2023
Davie County

NAME	BILL NUMBER	OPER	DATE/TIME	DISTRICT	VALUE	AMOUNT
944000 ALLEN JOHNNY R	2023-17394	DY: RP:E600000070	RRiel	9/26/2023 2:41:39 PM		
				C ADVLTAX	54,310.00	398.09
				FR15ADVL TAX	54,310.00	21.72
				TOTAL RELEASES:		419.81
8320583 BANKS ZACKARRIAH	2023-30388	DY: RP:	Heather B	10/11/2023 3:03:02 PM		
				C-EMS DELQ FEE	0.00	100.00
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		160.00
8320584 BEAN DAVID	2023-30389	DY: RP:	Heather B	10/11/2023 3:02:15 PM		
				C-EMS DELQ FEE	0.00	754.52
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		814.52
202220132900 BECK MICHAEL WAYNE	2022-201329	DY:21 PERSONAL PROPERTY	Heather B	9/18/2023 3:07:00 PM		
				C GARNFEE	13,450.00	90.00
				TOTAL RELEASES:		90.00
8313636 BOST LARRY THOMAS	2023-7818	DY:0RP:E70000005706	RRiel	9/19/2023 9:46:23 AM		
				C ADVLTAX	45,370.00	332.56
				FR15ADVL TAX	45,370.00	18.15
				TOTAL RELEASES:		350.71
8321103 BOYLES MISTY	2023-30476	DY: RP:	Heather B	10/13/2023 4:42:02 PM		
				C-EMS DELQ FEE	0.00	200.00
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		260.00
8320585 CALLENDER ASHLEA	2023-30390	DY: RP:	Heather B	10/11/2023 3:01:27 PM		
				C-EMS DELQ FEE	0.00	149.73
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		209.73
8320752 CHAMBERS JOHN	2023-30417	DY: RP:	MBRASELL S	9/22/2023 10:20:20 AM		
				C-EMS DELQ FEE	0.00	104.31
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		164.31
8320334 CHRISCOE SHERRI	2022-33678	DY: RP:	MBRASELL S	9/28/2023 10:26:38 AM		
				C-EMS DELQ FEE	0.00	200.00
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		260.00
				TOTAL RELEASES:		123

NO PAYMENTS WITHIN 90 DAYS

NAME	BILL NUMBER	OPER	DATE/TIME	DISTRICT	VALUE	AMOUNT
8320587 COCHRAN TAMMY	2023-30392	DY: RP:	Heather B	10/11/2023 3:00:46 PM		
				C-EMS DELQ FEE	0.00	744.92
				C EMS GARN FEE	0.00	60.00
		NO PAYMENT FOR 90 DAYS		TOTAL RELEASES:		804.92
8320931 GENTRY VERONICA	2023-30450	DY: RP:	MBRASELL S	9/25/2023 12:09:04 PM		
				C-EMS DELQ FEE	0.00	250.00
				C EMS GARN FEE	0.00	60.00
		PAID TO EMS ON 9/19/23 WITHOUT GARN FEE		TOTAL RELEASES:		310.00
82520440 HEWLETT PACKARD FINANCIAL SER	2023-6580	DY: PERSONAL PROPERTY	lpotts	9/15/2023 2:48:02 PM		
				C PEN FEE	0.00	14.70
				FR16PEN FEE	0.00	0.80
		PENALTY FEE RELEASED PROOF PROVIDED.		TOTAL RELEASES:		15.50
8320343 JOYNER CHRISTOPHER	2022-33687	DY: RP:	MBRASELL S	9/28/2023 10:27:38 AM		
				C-EMS DELQ FEE	0.00	529.72
				C EMS GARN FEE	0.00	60.00
		NO PAYMENTS MADE WITHIN 90 DAYS		TOTAL RELEASES:		589.72
8320594 KELLY MICHAEL	2023-30399	DY: RP:	Heather B	10/11/2023 3:03:38 PM		
				C-EMS DELQ FEE	0.00	680.30
				C EMS GARN FEE	0.00	60.00
		NO PAYMENT FOR 90 DAYS		TOTAL RELEASES:		740.30
44068000 LAKEYS BACKHOE SERVICE INC	2023-203514	DY:21 PERSONAL PROPERTY	krafie	10/6/2023 3:55:55 PM		
				C ADVLTAX	4,181.00	30.65
				C PEN FEE	4,181.00	6.13
				FR12ADVL TAX	4,181.00	1.67
				FR12PEN FEE	4,181.00	0.33
		LISTED SUPPLIES EACH YEAR. SHOULD NOT HAVE A SUPPLY VALUE IN AUDIT		TOTAL RELEASES:		38.78
44068000 LAKEYS BACKHOE SERVICE INC	2023-203515	DY:20 PERSONAL PROPERTY	krafie	10/6/2023 3:56:39 PM		
				C ADVLTAX	3,991.00	29.45
				C PEN FEE	3,991.00	8.84
				FR12ADVL TAX	3,991.00	1.60
				FR12PEN FEE	3,991.00	0.48
		LISTED SUPPLIES EACH YEAR. SHOULD NOT HAVE A SUPPLY VALUE IN AUDIT		TOTAL RELEASES:		40.37
44068000 LAKEYS BACKHOE SERVICE INC	2023-203516	DY:19 PERSONAL PROPERTY	krafie	10/6/2023 3:57:01 PM		
				C ADVLTAX	2,261.00	16.69
				C PEN FEE	2,261.00	6.61
				FR12ADVL TAX	2,261.00	0.91

NAME	BILL NUMBER	OPER	DATE/TIME	DISTRICT	VALUE	AMOUNT
				FR12PEN FEE	2,261.00	0.36
				TOTAL RELEASES:		24.63
44068000	2023-203517	LISTED SUPPLIES EACH YEAR. SHOULD NOT HAVE A SUPPLY VALUE IN AUDIT DY: 18 PERSONAL PROPERTY	krafie	10/6/2023 3:57:32 PM		
LAKEYS BACKHOE SERVICE INC				C ADVLTAX	3,328.00	24.56
				C PEN FEE	3,328.00	12.28
				FR12ADVL TAX	3,328.00	1.33
				TOTAL RELEASES:		38.17
8320937	2023-30456	LISTED SUPPLIES EACH YEAR. SHOULD NOT HAVE A SUPPLY VALUE IN AUDIT DY: RP:	Heather B	9/15/2023 10:47:35 AM		
LIVENGOD MICHAEL				C-EMS DELQ FEE	0.00	300.00
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		360.00
8320345	2022-33689	NO RECORD OF EMPLOYMENT DY: RP:	MBRASELL S	10/11/2023 3:01:32 PM		
MCDONALD CARLLET				C-EMS DELQ FEE	0.00	143.85
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		203.85
8320940	2023-30459	WRONG SSI & RUN # FROM EMS DY: RP:	MBRASELL S	9/18/2023 1:32:38 PM		
MEDFORD MEGAN				C-EMS DELQ FEE	0.00	106.69
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		166.69
8320602	2023-30406	TERMINATED 8/5/23 DY: RP:	Heather B	10/11/2023 3:03:56 PM		
NORMAN OCTAVIA				C-EMS DELQ FEE	0.00	128.06
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		188.06
8320943	2023-30462	NO PAYMENT FOR 90 DAYS DY: RP:	MBRASELL S	9/18/2023 1:33:46 PM		
PASSERALLO MICHELLE				C-EMS DELQ FEE	0.00	581.04
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		641.04
8320609	2023-30412	TERMINATED 4/24/23 DY: RP:	Heather B	10/11/2023 3:04:43 PM		
TOWNSEND LAURIE				C-EMS DELQ FEE	0.00	200.00
				C EMS GARN FEE	0.00	60.00
				TOTAL RELEASES:		260.00
8300932	2023-6027	NO PAYMENT FOR 90 DAYS DY: PERSONAL PROPERTY	krafie	9/19/2023 9:23:17 AM		
US BANK NATIONAL ASSOCIATION				C ADVLTAX	46,060.00	337.62
				CI02ADVL TAX	46,060.00	133.57

RUN DATE: 10/16/2023 8:57 AM

REGULAR RELEASE REPORT 9/15/2023-10/14/2023
Davie County

NAME	BILL NUMBER	OPER	DATE/TIME	DISTRICT	VALUE	AMOUNT
				FR12ADVL TAX	46,060.00	18.42
				TOTAL RELEASES:		489.61
US BANK AMOUNT FOR MOCKSVILLE CITY WAS OVERBILLED AND THE AMOUNT FOR COUNTY WAS UNDER BILLED. ADJUSTMENTS HAVE BEEN APPROPRIATELY MADE.						
8300932	2023-6027	DY: PERSONAL PROPERTY	krafie	9/19/2023 12:03:21 PM		
US BANK NATIONAL ASSOCIATION						
				C ADVL TAX	46,060.00	-337.62
				CI02ADVL TAX	46,060.00	-133.57
				FR12ADVL TAX	46,060.00	-18.42
				TOTAL RELEASES:		-489.61
8317534	2023-24778	DY: PERSONAL PROPERTY	krafie	9/18/2023 4:53:37 PM		
WHEELER FINANCIAL						
				C ADVL TAX	19,112.00	140.09
				C PEN FEE	19,112.00	14.01
				FR15ADVL TAX	19,112.00	7.64
				FR15PEN FEE	19,112.00	0.76
				TOTAL RELEASES:		162.50
MVEH TAGGED. TAX PAID AT RENEWAL						
NET RELEASES PRINTED:	7,313.61					
TOTAL TAXES RELEASED						7,313.61

C ADVL TAX - COUNTY TAX

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2018	0	3,328	3,328	0.00	24.56	0	0.00	3,328	24.56
2023	2019	0	2,261	2,261	0.00	16.69	0	0.00	2,261	16.69
2023	2020	0	3,991	3,991	0.00	29.45	0	0.00	3,991	29.45
2023	2021	0	4,181	4,181	0.00	30.65	0	0.00	4,181	30.65
2023	2023	99,680	19,112	118,792	730.65	140.09	0	0.00	118,792	870.74
DIST TOTAL		99,680	32,873	132,553	730.65	241.44	0	0.00	132,553	972.09

C GARNFEE - C GARNFEE

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2022	2021	0	13,450	13,450	0.00	90.00	0	0.00	13,450	90.00
DIST TOTAL		0	13,450	13,450	0.00	90.00	0	0.00	13,450	90.00

C PEN FEE - C PEN FEE

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2018	0	3,328	3,328	0.00	12.28	0	0.00	3,328	12.28
2023	2019	0	2,261	2,261	0.00	6.68	0	0.00	2,261	6.68
2023	2020	0	3,991	3,991	0.00	8.84	0	0.00	3,991	8.84
2023	2021	0	4,181	4,181	0.00	6.13	0	0.00	4,181	6.13
2023	2023	0	19,112	19,112	0.00	28.71	0	0.00	19,112	28.71
DIST TOTAL		0	32,873	32,873	0.00	62.64	0	0.00	32,873	62.64

C EMS GARN FEE - C EMS GARN FEE

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2022	2022	0	0	0	0.00	180.00	0	0.00	0	180.00
2023	2023	0	0	0	0.00	780.00	0	0.00	0	780.00
DIST TOTAL		0	0	0	0.00	960.00	0	0.00	0	960.00

C-EMS DELQ FEE - C-EMS DELQ FEE

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2022	2022	0	0	0	0.00	873.57	0	0.00	0	873.57
2023	2023	0	0	0	0.00	4,299.57	0	0.00	0	4,299.57
DIST TOTAL		0	0	0	0.00	5,173.14	0	0.00	0	5,173.14

CI02ADVL TAX - MOCKSVILLE CITY

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2023	0	0	0	0.00	0.00	0	0.00	0	0.00
DIST TOTAL		0	0	0	0.00	0.00	0	0.00	0	0.00

FR12ADVL TAX - FIREADVL12

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2018	0	3,328	3,328	0.00	1.33	0	0.00	3,328	1.33
2023	2019	0	2,261	2,261	0.00	0.90	0	0.00	2,261	0.90
2023	2020	0	3,991	3,991	0.00	1.60	0	0.00	3,991	1.60
2023	2021	0	4,181	4,181	0.00	1.67	0	0.00	4,181	1.67
2023	2023	0	0	0	0.00	0.00	0	0.00	0	0.00
DIST TOTAL		0	13,761	13,761	0.00	5.50	0	0.00	13,761	5.50

REGULAR RELEASE REPORT 9/15/2023-10/14/2023
Davie County

FR12PEN FEE - FIREPEN FEE12

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2019	0	2,261	2,261	0.00	0.36	0	0.00	2,261	0.36
2023	2020	0	3,991	3,991	0.00	0.48	0	0.00	3,991	0.48
2023	2021	0	4,181	4,181	0.00	0.33	0	0.00	4,181	0.33
DIST TOTAL		0	10,433	10,433	0.00	1.17	0	0.00	10,433	1.17

FR15ADVL TAX - FIREADVL15

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2023	99,680	19,112	118,792	39.87	7.64	0	0.00	118,792	47.51
DIST TOTAL		99,680	19,112	118,792	39.87	7.64	0	0.00	118,792	47.51

FR15PEN FEE - FIREPEN FEE15

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2023	0	19,112	19,112	0.00	0.76	0	0.00	19,112	0.76
DIST TOTAL		0	19,112	19,112	0.00	0.76	0	0.00	19,112	0.76

FR16PEN FEE - FIREPEN FEE16

TAX YEAR	RATE YEAR	REAL VALUE RELEASED	PERS VALUE RELEASED	TOTAL VALUE RELEASED	REAL TAX RELEASED	PERS TAX RELEASED	MV VALUE RELEASED	MV TAXES RELEASED	TOTAL VALUE RELEASED	TOTAL TAXES RELEASED
2023	2023	0	0	0	0.00	0.80	0	0.00	0	0.80
DIST TOTAL		0	0	0	0.00	0.80	0	0.00	0	0.80

GRAND TOTALS:		199,360	141,614	340,974	770.52	6,543.09	0	0.00	340,974	7,313.61
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RUN DATE: 10/16/2023 8:58 AM

VEHICLE RELEASE REPORT 9/15/2023-10/14/2023
Davie County

PARAMETERS SELECTED FOR RELEASES REPORT:

TRANSACTION DATE/TIME RANGE: 9/15/2023 - 10/14/2023

PAYMENT DATE RANGE:

BILL TYPE: Motor Vehicle

BILL YEAR/NUMBER RANGE:

PRINT TOTALS ONLY: No

USER/OPERATOR:

EXCLUDE USERS/OPERATORS: ,R2

SORT ORDER: Name

REPORT TITLE: VEHICLE RELEASE REPORT

9/15/2023-10/14/2023

DISTRICT/TYPE/FEE:

BATCH MONTH RANGE:

BATCH YEAR RANGE:

BATCH REAL TIME:

INCLUDE ONLY THOSE WITH RELEASE NUMBERS: No

RUN DATE: 10/16/2023 8:58 AM

VEHICLE RELEASE REPORT 9/15/2023-10/14/2023
Davie County

RUN DATE: 10/16/2023 8:58 AM

VEHICLE RELEASE REPORT 9/15/2023-10/14/2023
Davie County

NAME	BILL NUMBER	OPER	DATE/TIME	DISTRICT	VALUE	AMOUNT
NET RELEASES PRINTED:						
TOTAL TAXES RELEASED						

RUN DATE: 10/16/2023 8:58 AM

VEHICLE RELEASE REPORT 9/15/2023-10/14/2023
Davie County

GRAND TOTALS:

RUN DATE: 10/16/2023 8:46 AM

DAVIE COUNTY REFUND REPORT
REGULAR REFUND REPORT 9/15/2023-10/14/2023

PARAMETERS SELECTED FOR ACTIVITY REFUND REPORT:

TRANSACTION DATE RANGE: 09/15/2023 12:00:00 AM - 10/14/2023 12:00:00 AM

PAYMENT DATE RANGE:

USER/OPERATOR: ,R2

TAX DISTRICT(S):

BILL YEAR RANGE:

BILL# RANGE:

BILL TYPE: Regular

SORT BY: Name

RELEASE NUMBER ONLY:No

PAYMENT TYPE: ,Card - Card,Cash - Cash,Check -
Check,Check Wire - Check Wire,MOrder - Money
Order,UNKNOWN -

DAVIE COUNTY REFUND REPORT
REGULAR REFUND REPORT 9/15/2023-10/14/2023

NAME	BILL NUMBER	PAYMENT TYPE	AMOUNT	OPER	DATE TIME
TOTAL REFUNDS PRINTED:					
TOTAL VOID REFUNDS:	0.00				
TOTAL:	0.00				

RUN DATE: 10/16/2023 8:46 AM

DAVIE COUNTY REFUND REPORT
REGULAR REFUND REPORT 9/15/2023-10/14/2023

VOIDED REFUND AMOUNTS OF REFUNDS NOT IN 9/15/2023 - 10/14/2023

NAME	BILL NUMBER	AMOUNT	OPER	PAYMENT TYPE	DATE	TIME	REFUND DATE
TOTAL VOID REFUNDS:							

RUN DATE: 10/16/2023 8:47 AM

DAVIE COUNTY REFUND REPORT
VEHICLE REFUND REPORT 9/15/2023-10/14/2023

PARAMETERS SELECTED FOR ACTIVITY REFUND REPORT:

TRANSACTION DATE RANGE: 09/15/2023 12:00:00 AM - 10/14/2023 12:00:00 AM

PAYMENT DATE RANGE:

USER/OPERATOR: ,R2

TAX DISTRICT(S):

BILL YEAR RANGE:

BILL# RANGE:

BILL TYPE: Motor Vehicle

SORT BY: Name

RELEASE NUMBER ONLY:No

PAYMENT TYPE: ,Card - Card,Cash - Cash,Check -
Check,Check Wire - Check Wire,MOrder - Money
Order,UNKNOWN -

RUN DATE: 10/16/2023 8:47 AM

DAVIE COUNTY REFUND REPORT
VEHICLE REFUND REPORT 9/15/2023-10/14/2023

NAME	BILL NUMBER	PAYMENT TYPE	AMOUNT	OPER	DATE TIME
TOTAL REFUNDS PRINTED:					
TOTAL VOID REFUNDS:	0.00				
TOTAL:	0.00				

RUN DATE: 10/16/2023 8:47 AM

DAVIE COUNTY REFUND REPORT
VEHICLE REFUND REPORT 9/15/2023-10/14/2023

VOIDED REFUND AMOUNTS OF REFUNDS NOT IN 9/15/2023 - 10/14/2023

NAME	BILL NUMBER	AMOUNT	OPER	PAYMENT TYPE	DATE	TIME	REFUND DATE
TOTAL VOID REFUNDS:							

Mocksville Refund ~~Q~~
Total Refund \$1,134.68



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 10/10/2023 10:55:55

Payee Name	Primary Owner	Address 1	Address 3	Refund Type	Bill #	Status	Transaction #	Refund Description	Refund Reason	Create Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
ALLEN, DAWN SMITH	ALLEN, DAWN SMITH	156 HOMESTEAD LN	MOCKSVILLE, NC 27028	Proration	0019083901	PENDING	194649306	Refund Generated due to proration on Bill #0019083901-2022-2022-0000-00	Vehicle Sold	10/11/2023	C ADVL	Tax	(\$23.53)	\$0.00	(\$23.53)
											FIREADVL9	Tax	(\$1.28)	\$0.00	(\$1.28)
															Refund \$24.81
BALLINGER, CHRISTOPHER NICHOLAS	BALLINGER, CHRISTOPHER NICHOLAS	124 LAKEPOINT DR	ADVANCE, NC 27006	Adjustment >= \$100	0063315502	PENDING	291491495	Refund Generated due to adjustment on Bill #0063315502-2023-2023-0000-00	Over Assessment	10/04/2023	C ADVL	Tax	(\$125.99)	\$0.00	(\$125.99)
											C03ADVL	Tax	(\$25.78)	\$0.00	(\$25.78)
											FIREADVL15	Tax	(\$6.87)	\$0.00	(\$6.87)
															Refund \$158.64
BOYLES, ROBERT RANDALL	BOYLES, ROBERT RANDALL	176 CHARLOTTE PL	ADVANCE, NC 27006	Proration	0072089966	PENDING	194327630	Refund Generated due to proration on Bill #0072089966-2022-2022-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$47.11)	\$0.00	(\$47.11)
											FIREADVL15	Tax	(\$2.57)	\$0.00	(\$2.57)
															Refund \$49.68
BURAZER, GREGORY WILLIAM	BURAZER, GREGORY WILLIAM	142 AVIATION WAY	MOCKSVILLE, NC 27028	Proration	0014791939	PENDING	194327656	Refund Generated due to proration on Bill #0014791939-2022-2022-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$20.57)	\$0.00	(\$20.57)
											FIREADVL8	Tax	(\$1.12)	\$0.00	(\$1.12)
															Refund \$21.69
CAMPBELL, WILLIAM PRENTICE	CAMPBELL, WILLIAM PRENTICE	287 OLD TOWNE DR	ADVANCE, NC 27006	Proration	0054435211	PENDING	291491451	Refund Generated due to proration on Bill #0054435211-2022-2022-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$63.11)	\$0.00	(\$63.11)
											C03ADVL	Tax	(\$12.91)	\$0.00	(\$12.91)
											FIREADVL15	Tax	(\$3.44)	\$0.00	(\$3.44)
															Refund \$79.46
CORNATZER, THOMAS FRANKLIN	CORNATZER, THOMAS FRANKLIN	145 BLACKBERRY LN	ADVANCE, NC 27006	Proration	0071810825	PENDING	291491487	Refund Generated due to proration on Bill #0071810825-2022-2022-0000-00	Vehicle Totalled	10/04/2023	C ADVL	Tax	(\$42.40)	\$0.00	(\$42.40)
											ADVRUR	Tax	(\$1.41)	\$0.00	(\$1.41)
											FIREADVL1	Tax	(\$2.31)	\$0.00	(\$2.31)
															Refund \$46.12
DAVIE CONSTRUCTION COMPANY	DAVIE CONSTRUCTION COMPANY	PO BOX 1724 STE 200	CLEMMONS, NC 27012	Proration	0053073993	PENDING	291590325	Refund Generated due to proration on Bill #0053073993-2022-2022-0000-00	Vehicle Totalled	10/05/2023	C ADVL	Tax	(\$63.47)	\$0.00	(\$63.47)
											C03ADVL	Tax	(\$12.99)	\$0.00	(\$12.99)
											FIREADVL15	Tax	(\$3.47)	\$0.00	(\$3.47)
															Refund \$79.93
DODD, JACK AARON LEE	DODD, JACK AARON LEE	PO BOX 1035 7773 NC HWY 801 S	COOLEEMEE, NC 27014	Proration	0052602222	PENDING	291491656	Refund Generated due to proration on Bill #0052602222-2022-2022-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$151.06)	\$0.00	(\$151.06)
											C01ADVL	Tax	(\$86.56)	\$0.00	(\$86.56)
											FIREADVL4	Tax	(\$8.24)	\$0.00	(\$8.24)
															Refund \$245.86
HENDRICKS, PHILLIP NEIL	HENDRICKS, PHILLIP NEIL	155 CANE MILL DR	MOCKSVILLE, NC 27028	Proration	0059830766	PENDING	194327648	Refund Generated due to proration on Bill #0059830766-2022-2022-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$48.92)	\$0.00	(\$48.92)
											FIREADVL6	Tax	(\$2.67)	\$0.00	(\$2.67)
															Refund \$51.59
HOWARD, JOHN WESLEY	HOWARD, JOHN WESLEY	111 CLIFFORD FARM WAY	ADVANCE, NC 27006	Proration	0066039091	PENDING	292056435	Refund Generated due to proration on Bill #0066039091-2022-2022-0000-00	Vehicle Sold	10/12/2023	C ADVL	Tax	(\$164.06)	\$0.00	(\$164.06)
											ADVRUR	Tax	(\$5.45)	\$0.00	(\$5.45)
											FIREADVL1	Tax	(\$8.95)	\$0.00	(\$8.95)
															Refund \$178.46
MCCLEARY, MICHAEL JAY	MCCLEARY, MICHAEL JAY	140 ARBOR HILL AVE	MOCKSVILLE, NC 27028	Proration	0068703886	PENDING	194327650	Refund Generated due to proration on Bill #0068703886-2022-2022-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$58.79)	\$0.00	(\$58.79)
											FIREADVL12	Tax	(\$3.21)	\$0.00	(\$3.21)
															Refund \$62.00
PLANT, TOMMY GEORGE	PLANT, TOMMY GEORGE	153 BALTIMORE DOWNS RD	ADVANCE, NC 27006	Proration	0053251895	PENDING	194327888	Refund Generated due to proration on Bill #0053251895-2022-2022-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$44.51)	(\$2.22)	(\$46.73)
											FIREADVL5	Tax	(\$2.43)	(\$0.12)	(\$2.55)
															Refund \$49.28
SPILLMAN, JERRY DEAN	SPILLMAN, JERRY DEAN	PO BOX 702	COOLEEMEE, NC 27014	Proration	0073935832	PENDING	194327642	Refund Generated due to proration on Bill #0073935832-2023-2023-0000-00	Vehicle Sold	10/04/2023	C ADVL	Tax	(\$82.65)	\$0.00	(\$82.65)
											FIREADVL	Tax	(\$4.51)	\$0.00	(\$4.51)
															Refund \$87.16
															Refund \$1134.68
															Total

**DAVIE COUNTY
NORTH CAROLINA**

Davie County Government
Tax Administration Office 336.753.6120

Jamon Gaddy
Tax Administrator

TO THE BOARD OF COUNTY COMMISSIONERS

COUNTY & FIRE PERCENTAGE REPORT -REGULAR

September 2023

YEAR	LEVY	OUTSTANDING	PREV CTD	CTD**	BAL COLUMN	CTM*	Current	Last Year
2000	11,394,578.09	5,549.11	11,389,028.98	11,389,028.98	11,394,578.09	\$0.00	99.95%	99.95%
2001	14,870,075.37	6,131.40	14,863,943.97	14,863,943.97	14,870,075.37	\$0.00	99.96%	99.96%
2002	15,308,340.96	6,264.71	15,302,076.18	15,302,076.18	15,308,340.96	\$0.00	99.96%	99.96%
2003	15,711,196.51	3,356.65	15,707,839.86	15,707,839.86	15,711,196.51	\$0.00	99.98%	99.98%
2004	16,575,522.54	3,646.46	16,571,876.08	16,571,876.08	16,575,522.54	\$0.00	99.98%	99.98%
2005	19,243,723.51	4,668.71	19,239,054.80	19,239,054.80	19,243,723.51	\$0.00	99.98%	99.98%
2006	22,110,487.70	9,271.35	22,101,216.35	22,101,216.35	22,110,487.70	\$0.00	99.96%	99.96%
2007	22,860,769.03	10,037.06	22,850,731.97	22,850,731.97	22,860,769.03	\$0.00	99.96%	99.96%
2008	23,674,851.42	15,177.79	23,659,673.63	23,659,673.63	23,674,851.42	\$0.00	99.94%	99.94%
2009	24,499,410.22	20,668.58	24,478,741.64	24,478,741.64	24,499,410.22	\$0.00	99.92%	99.92%
2010	24,492,482.11	18,795.87	24,473,686.24	24,473,686.24	24,492,482.11	\$0.00	99.92%	99.92%
2011	24,608,113.19	17,172.92	24,590,940.27	24,590,940.27	24,608,113.19	\$0.00	99.93%	99.93%
2012	24,662,870.11	10,983.51	24,651,804.78	24,651,804.78	24,662,870.11	\$81.82	99.96%	99.95%
2013	25,000,753.62	8,199.65	24,991,794.39	24,992,553.97	25,000,753.62	\$759.58	99.97%	99.95%
2014	25,068,851.69	15,103.43	25,052,949.25	25,053,748.26	25,068,851.69	\$799.01	99.94%	99.92%
2015	30,401,936.81	24,314.42	30,376,607.13	30,377,622.39	30,401,936.81	\$1,015.26	99.92%	99.90%
2016	31,761,538.87	28,039.51	31,732,458.18	31,733,499.36	31,761,538.87	\$1,041.18	99.91%	99.88%
2017	32,241,025.56	32,518.17	32,206,408.01	32,208,507.39	32,241,025.56	\$2,099.38	99.90%	99.84%
2018	32,769,649.45	49,261.39	32,719,086.95	32,720,388.06	32,769,649.45	\$1,301.11	99.85%	99.77%
2019	34,542,782.18	68,071.89	34,473,012.62	34,474,710.29	34,542,782.18	\$1,697.67	99.80%	99.67%
2020	34,180,368.82	90,585.19	34,087,749.28	34,089,783.63	34,180,368.82	\$2,034.35	99.73%	99.51%
2021	37,351,939.67	134,706.62	37,212,709.03	37,217,233.05	37,351,939.67	\$4,524.02	99.64%	99.23%
2022	38,414,975.64	268,214.27	38,124,066.06	38,146,761.37	38,414,975.64	\$22,695.31	99.30%	19.65%
2023	39,842,382.69	31,305,829.41	6,717,737.32	8,536,553.28	39,842,382.69	\$1,818,815.96	21.43%	0.00%

BEGINNING JULY 1, 2023

	PREV CTD	CTM*	CTD**
MOCKSVILLE	518,870.26	123,232.15	642,102.41
COOLEEMEE	20,309.45	3,627.41	23,936.86
COOL SOLID WASTE	8,337.15	1,420.28	9,757.43
BERMUDA RUN	146,490.22	45,571.49	192,061.71
BERMUDA RUN GATE	105,421.97	32,519.57	137,941.54
COUNTY OCCUPANCY TAX	31,308.38	12,980.58	44,288.96

*CTM - COLLECTED THIS MONTH

**CTD - COLLECTED TO DATE

I, Jamon Gaddy, do hereby certify that the foregoing is a true and correct statement

DAVIE COUNTY NORTH CAROLINA

Davie County Government
Tax Administration Office 336.753.6120

Jamon Gaddy
Tax Administrator

TO THE BOARD OF COUNTY COMMISSIONERS

COUNTY & FIRE PERCENTAGE REPORT -VEHICLE

SEPT-23

YEAR	LEVY	OUTSTANDING	PREV CTD	CTD**	BAL COLUMN	CTM*	Current	Last Year
2000	1,815,317.79	17,109.63	1,798,208.16	1,798,208.16	1,815,317.79	\$0.00	99.05%	99.05%
2001	1,769,944.64	14,105.62	1,755,839.02	1,755,839.02	1,769,944.64	\$0.00	99.20%	99.20%
2002	1,828,368.52	14,323.36	1,814,045.16	1,814,045.16	1,828,368.52	\$0.00	99.21%	99.21%
2003	1,861,071.16	12,266.79	1,848,804.37	1,848,804.37	1,861,071.16	\$0.00	99.34%	99.34%
2004	1,947,892.07	14,389.02	1,933,503.05	1,933,503.05	1,947,892.07	\$0.00	99.26%	99.26%
2005	2,315,348.72	15,593.31	2,299,755.41	2,299,755.41	2,315,348.72	\$0.00	99.32%	99.32%
2006	2,269,233.08	20,586.31	2,248,646.77	2,248,646.77	2,269,233.08	\$0.00	99.09%	99.09%
2007	2,414,186.78	22,513.10	2,391,673.68	2,391,673.68	2,414,186.78	\$0.00	99.06%	99.06%
2008	2,343,382.45	16,723.62	2,326,658.83	2,326,658.83	2,343,382.45	\$0.00	99.28%	99.28%
2009	2,090,890.55	14,650.55	2,076,240.00	2,076,240.00	2,090,890.55	\$0.00	99.29%	99.30%
2010	1,990,292.16	17,243.99	1,973,048.17	1,973,048.17	1,990,292.16	\$0.00	99.13%	99.13%
2011	2,095,818.11	19,669.28	2,076,148.83	2,076,148.83	2,095,818.11	\$0.00	99.03%	99.03%
2012	2,199,886.44	24,931.39	2,174,955.05	2,174,955.05	2,199,886.44	\$0.00	98.81%	98.81%
2013	1,324,560.98	13,610.36	1,310,947.57	1,310,950.62	1,324,560.98	\$103.05	98.90%	98.90%
2014	681.30	15.12	666.18	666.18	681.30	\$0.00	97.78%	97.78%
2015	752.57	0.00	752.57	752.57	752.57	\$0.00	100.00%	100.00%
2016	1136.10	0.00	1,136.10	1,136.10	1,136.10	\$0.00	100.00%	100.00%
2017	3538.30	120.82	3,417.48	3,417.48	3,538.30	\$0.00	96.59%	96.59%
2018	723.91	0.00	723.91	723.91	723.91	\$0.00	65.26%	65.26%
2019	524.62	239.21	285.41	285.41	524.62	\$0.00	54.40%	54.40%
2020	0.00	0.00	0.00	0.00	0.00	\$0.00	0.00%	0.00%
2021	0.00	0.00	0.00	0.00	0.00	\$0.00	0.00%	0.00%
2022	0.00	0.00	0.00	0.00	0.00	\$0.00	0.00%	0.00%
2023	67.22	0.00	67.22	67.22	67.22	\$0.00	100.00%	100.00%

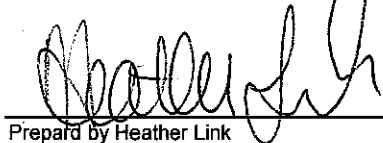
BEGINNING JULY 1, 2023

	PREV CTD	CTM*	CTD**
MOCKSVILLE	317.21	0.00	317.21
COOLEEMEE	0.00	0.00	0.00
BERMUDA RUN	0.00	0.00	0.00
FIRE	172.54	16.06	188.60
COUNTY GROSS RECEIPTS	3,505.01	198.01	3,703.02

*CTM - COLLECTED THIS MONTH

**CTD - COLLECTED TO DATE

I, Jamon Gaddy, do hereby certify that the foregoing is a true and correct statement



Prepared by Heather Link

10/9/2023

Item Cover Page

BOARD OF COMMISSIONERS AGENDA ITEM REPORT

DATE: November 6, 2023

SUBMITTED BY: Karen Logan, Clerk to the Board

ITEM TYPE: Report

AGENDA SECTION: Closed Session - Chair Jones

SUBJECT: Closed Session Pursuant to NCGS 143-318.11(a)(5) To establish, or to instruct the public body's staff or negotiating agents concerning the position to be taken by or on behalf of the public body in negotiating (i) the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease; or (ii) the amount of compensation and other material terms of an employment contract or proposed employment contract

SUGGESTED ACTION:

ATTACHMENTS: