



City Council Agenda

Thursday, July 08, 2021

6:00 PM

35 Cabarrus Avenue, W, Concord NC 28025

Cell phones are to be turned off or placed on vibrate during the meeting. Please exit the Council Chambers before using your cell phone.

The agenda is prepared and distributed on Friday preceding the meeting to Council and news media. A work session is then held on the Tuesday preceding the regular meeting at 4:00 pm.

I. Call to Order

II. Pledge of Allegiance and Moment of Silent Prayer

III. Approval of Minutes

June 8, and June 10, 2021

IV. Presentations

1. Presentation of retirement plaque to Sergeant Skip Hinson for over 28 years of service with the City of Concord Police Department. Sgt. Hinson retired from the Concord Police Department on July 1, 2021. Sgt. Hinson began his career as a patrol officer in 1993. He spent his career working in different areas of the department including patrol, the Problem Action Team and the Criminal Investigations Division. He was promoted to sergeant in 2008 and ended his career as a sergeant in the David District (Mills Mall area) of the City.

2. Presentation of Certificate of Appreciation to Dr. Lee Gray recognizing 9 years of service to the City of Concord Historic Preservation Commission.

V. Unfinished Business

VI. New Business

A. Informational Items

1. Presentation of the 2020 Community Health Needs Assessment. (Work Session)

Marcella Beam, Chief Community Health Officer and Healthy Cabarrus Executive Director for the Cabarrus Health Alliance, will present the 2020 Community Health Needs Assessment at the Tuesday, July 6th, City Council Work Session.

B. Departmental Reports

C. Recognition of persons requesting to be heard

D. Public Hearings

1. Conduct a public hearing to consider amending Section 8.8.4 of the Concord Development Ordinance (CDO) and Section 58-256 (c) of the City Code of Ordinances to clarify the use of recreational vehicles as residences. The proposed amendment quantifies the use of RV, travel trailers and campers on individual developed parcels and for security purposes. Planning staff has worked with Legal and Code Enforcement to draft minimum requirements based on recent enforcement actions.

Recommendation: Motion to adopt an ordinance amending Section 8.8.4 of the CDO and Section 58-256(c) of the City Code relative to recreational vehicles.

2. Conduct a public hearing to consider adopting an ordinance amending Chapters 1, 3, 4, 5, and Appendix A of the Historic Handbook relative to "160D and Minor" text changes. The Historic Preservation Commission has proposed to modify the Historic Handbook to be in compliance with 160D, update The Secretary of the Interior's Standards for Rehabilitation, clarify contradicting language in Chapter 5-Section 8, and update references and other clerical changes. See attached staff report for detailed information on the request and to view the specific changes.

Recommendation: Motion to adopt an ordinance amending the Historic Handbook Chapters 1, 3, 4, 5, and Appendix A relative to "160D and Minor" text changes.

3. **Conduct a public hearing to consider amending the 2030 Land Use Plan's Future Land Use Map and the text of Section 4.3.2 for a parcel located on the north side of Concord Parkway generally between George W. Liles Parkway and Rock Hill Church Road.** The subject property is approximately 385 acres and is the northernmost property ownership of the Bootsmead LLC property, which was formerly known as the Philip Morris land. Article 1 of the Concord Development Ordinance (CDO) allows the Council to initiate amendments and to consider updates to the Land Use Plan (LUP). Council has requested that this amendment be initiated in order to change the subject property's future land use designation from Mixed Use Activity Center (MUAC) to Industrial Employment (IE).

Recommendation: Motion to adopt an ordinance amending the LUP's Future Land Use Map and the corresponding text contained in Section 4.3.2.

E. Presentations of Petitions and Requests

1. **Consider awarding a bid to Holden Building in the amount of \$1,259,999 to complete the entire renovation of the Ceramics Center at ClearWater Arts Center & Studios located at 223 Crowell Drive NW using CDBG funds.** ClearWater is the realization, but still developing, unique initiative spearheaded by the City of Concord in conjunction with several partners, including the Gibson Village Neighborhood Association. Its purpose: to consciously and intentionally build a hub of creative, artistic activity that will help develop community growth, by inducting artists, and an art-centric set of spaces open and available for access and use, into this neighborhood. The proposed renovation will provide one (1) shared studio, a manager office, large classroom, glazing room, glaze mixing room, and a kiln room. A drawing of the proposed work is enclosed along with the bid tabulation sheet. The cost estimate for the project was \$934,005, but with COVID related price issues, the lowest responsible bid was \$1,259,999 from Holden Building. Ten (10) Construction companies requested bid documents with seven (7) submitting Prequalification for Single Prime Contractors Forms to show capacity before they were able to submit a bid. Ken Griffin, architect for this project, did confirm capacity of Holden Builders.

Recommendation: Motion to award a bid to Holden Building in the amount of \$1,259,999 to complete the entire renovations of the Ceramics Center at ClearWater Arts Center & Studios located at 223 Crowell Drive NW using CDBG funds.

2. **Consider renaming a section of Roberta Church Rd to Elmwood PI SW.** With NCDOT's completed construction of George W. Liles Pkwy, there is a short dead-end section of Roberta Church Rd which NCDOT realigned to connect to Concord Pkwy S. This realigned section of roadway needs to be assigned a new street name for safety and emergency-response reasons. There is already a separate section of Roberta Church Rd located off of Roberta Rd near Stough Rd which can potentially be confused with this particular street section. The name "Elmwood" was randomly selected by the Planning Department staff. Cabarrus County Planning Department has indicated that the name would be acceptable as a street name since it is not used anywhere else in the county. There are two single-family residential homes and one business for which staff would need to assign new addresses. Planning Department staff will give guidance to the property owners concerning the address change process. The Sign Shop in the Transportation Department would need to replace one green street blade at Concord Pkwy S and one at Oakview Dr. SW, making the cost very minimal.

Recommendation: Motion to rename the realigned section from Roberta Church Rd to Elmwood PI SW, if no other names are suggested.

- 3. Consider approving a salary increase as requested by the Concord ABC Board Members.** The Concord ABC Board Members have requested an increase in salary of \$75 per meeting. The last increase was approved in November 2016. The current rate is \$250 for the Chairman and \$200 for Members.

Recommendation: Motion to approve a salary increase of \$75 per meeting for the Concord ABC Board Members.

- 4. Consider approving Neighborhood Matching Grant awards distribution request for FY21-22 applicants.** The review committee determined that nine projects best meet the criteria for funding. The following twelve recommended projects, if funded, total \$30,000 which is the full NMG program amount included in the FY22 adopted budget: 1) Hidden Pond Seating Project - Request \$1,705 matching grant funds to support the Pond Seating Project; 2) Winding Walk Pet Stations and Benches Project - Request \$3,000 matching grant funds to support the installations of neighborhood pet stations to help keep the Winding Walk community clean and prevent soil and waterway contamination, and the spread of parasites and diseases; 3) Covington Playground Hip Shade Project - Request \$3,000 matching grant funds to support the installation of a new hip shade over their existing playground equipment; 4) Hampden Village Playground Expansion Project - Request \$3,000 in matching grant funds to support Hampden Village in their playground expansion project; 5) Residents of Historic Concord DogiPots Project - Request \$970 in matching grant funds to support the installation of DogiPot stations outside of public right-of-way areas on South Union Street. The stations will be installed and maintained by neighborhood volunteers and dues from the Residents of Historic Concord will help cover future material costs; 6) Christenbury Sidewalk Lighting Safety Project - Request \$3,000 matching grant funds to support the purchase and installation of 28 LEFD accent lights to complete the Sidewalk Lighting Safety Project; 7) Lanstone Heritage Tree Planting Project - Request \$2,450 in matching grant funds to support the Heritage Tree Planting project; 8) Hidden Pond Front Entrance Beautification Project - Request \$3,000 in matching grant funds to work with landscaper to reduce the size of the beds in their front entrance and upgrade their shrubbery by adding new low maintenance plants; 9) Highland Creek Entry Renovation Project - Request \$3,000 in matching grant funds for the Entry Renovation project at Highland Creek; 10) Ramsgate Barrier Fencing Project - Request \$2,900 in matching grant funds to support the Barrier Fencing project in the Ramsgate neighborhood; 11) Moss Creek Decorative Street Posts Project - Request \$2,850 in matching grant funds to support the replacement of existing steel street posts in Moss Creek Village with black decorative street posts; and 12) Bedford Farms Nature Walking Trail Project - Request \$2,825 in matching grant funds to support the Bedford Farms Nature Walking Trail. There were four projects not recommended for funding. A detailed description of all projects submitted (recommended and not recommended) are attached for your reference.

Recommendation: Motion to approve Neighborhood Matching Grant awards distribution request for FY21-22 applicants.

- 5. Consider declaring as surplus and authorize the sale of a Cummins 1250kW enclosed diesel generator with base tank (Serial #: K050851161, Year 2005) and accept a bid to purchase from LEL International.** This generator currently supplies back up power to City Hall and the Police Department and will be replaced with a new generator, thereby creating the surplus. The new generator will have sound attenuation and will operate more efficiently. Southeastern Consulting Engineers, Inc. developed a request for proposals to purchase the generator. Bids were received and opened on June 17, 2021. The highest responsive bid was received from LEL International out of Duncan, South Carolina, in the amount of \$65,300.

Recommendation: Motion to declare as surplus and accept a bid to purchase from LEL International in the amount of \$65,300.

6. Consider authorizing the City Manager to negotiate and execute an addendum to the contract with MetCon Inc. for design build services for the Electric Operations Center. MetCon, Inc. is currently under contract for pre-construction services related to the design and construction of the Electric Operations Center. Due to the volatility of the steel market and expected rising cost, MetCon has submitted a price for materials related to the pre-engineered buildings for the equipment sheds. By approving this purchase, we are locking in the price and saving an estimated \$79,210.06.

Recommendation: Motion to authorize the City Manager to negotiate and execute an addendum to the contract with MetCon Inc. for pre-engineered building material in the amount of \$673,384.

7. Consider adopting a project ordinance for an additional \$1.9 million in funding for the implementation of the AMI metering project and authorize the City Manager to negotiate an increase to the overall contract amount with Nexgrid for continued AMI services. This additional funding will allow for the purchase of additional communications modules to complete the project deployment as well as remediation activities. Funds will be assigned from retained earnings. Nexgrid is the provider of the AMI communications modules. Council previously approved additional funds last year for NEXGEN, who is the contractor assisting in the installation process.

Recommendation: Motion to adopt a project ordinance for an additional \$1.9 million in funding for the implementation of the AMI metering project and authorize the City Manager to negotiate an increase to the overall contract amount with Nexgrid for continued AMI services.

VII. Consent Agenda

A. Consider adopting a resolution authorizing an eminent domain action for property located at 220 Georgia Street. Title to this property is currently in the name of All Heirs Known and Unknown of Fannie Marie Reid. An attempt to transfer the title to Mr. Calvin Lewis Reid was made on or about October 2, 2018; however, several flaws in the deed appear to void that transaction. The tax value of the property is listed at \$32,930. There are judgments against several of the known heirs of Fannie Marie Reid in the total amount of \$8,776.32. Property taxes for the year 2020 are delinquent in the amount of \$420.57. This eminent domain action is requested by the City's Planning Department for the purpose of affordable housing.

Recommendation: Motion to adopt a resolution authorizing an eminent domain action for property located at 220 Georgia Street.

B. Consider adopting a resolution authorizing an eminent domain action for property located at 196 Mahan Street. Title to this property is currently in the name of Lillie Garvin Barrett (20% Interest), All Heirs Known and Unknown of Huey H. (Henry) Garvin (20% Interest), Sadie Gavin (Garvin) Thompson (20% Interest), All Heirs Known and Unknown of Samuel L. Garvin (20% Interest) and All Heirs Known and Unknown of Lenell (Lonell) Garvin (20% Interest). The tax value of the property is listed at \$49,840. Property taxes for the year 2020 have been paid. This eminent domain action is requested by the City's Planning Department for the purpose of affordable housing.

Recommendation: Motion to adopt a resolution authorizing an eminent domain action for property located at 196 Mahan Street.

C. Consider adopting a resolution authorizing an eminent domain action for property located at 23 Powder Street, NW. Title to this property is currently in the name of Misty Shea Newell and Stewardship-Bridgepoint Group. An attempt to transfer the title from Ms. Newell to Stewardship-Bridgepoint Group was made on or about July 28, 2009; however, several flaws in the deed appear to void that transaction. The tax value of the property is listed at \$54,150.00. Property taxes for the year 2020 have been paid. This eminent domain action is requested by the City's Planning Department for the purpose of affordable housing.

Recommendation: Motion to adopt a resolution authorizing an eminent domain action for property located at 23 Powder Street, NW.

- D. Consider adopting a resolution authorizing an eminent domain action for property located off of Melrose Drive, SW and known as lots 72 and 73 of Anneva Terrace.** Title to this property is currently in the name of Elizabeth G. Long. This property is landlocked with no direct access to Melrose Drive and has no improvements. The tax value of the property is listed at \$900. Property taxes for the year 2020 have been paid. This eminent domain action is requested by the City's Parks and Recreation Department for the purpose of constructing a greenway and access to the greenway.

Recommendation: Motion to adopt a resolution authorizing an eminent domain action for property located off of Melrose Drive, SW and known as lots 72 and 73 of Anneva Terrace.

- E. Consider a motion to accept a grant of easement from Cabarrus County for a water meter to serve the Novi Rise project on Barbrick Avenue.** In order to serve the Novi Rise project, an easement to locate a water meter is necessary on property owned by Cabarrus County. The easement was approved by the Cabarrus County Board of Commissioners on June 21, 2021.

Recommendation: Motion to accept a grant of easement from Cabarrus County for a water meter to serve the Novi Rise project on Barbrick Avenue.

- F. Consider adopting a resolution authorizing the lease of a portion of PIN 5539-34-7439, which includes 246 General Services Drive, 243 Betsy Carpenter Place and 244 Betsy Carpenter Place to Cabarrus County.** The current lease, entered in 1997, will expire on January 31, 2022. The lease terms are modified slightly to remove 242 Betsy Carpenter Place from the lease as the County will be selling that building to the City in the near future. The term of the new lease will be 25 years ending on January 30, 2047.

Recommendation: Motion to adopt a resolution authorizing the lease of a portion of PIN 5539-34-7439, which includes 246 General Services Drive, 243 Betsy Carpenter Place and 244 Betsy Carpenter Place to Cabarrus County.

- G. Consider approving revised policies and procedures manual for the City of Concord's Uniform Relocation Assistance (URA) Policy and the Residential Anti-Displacement and Relocation Plan.** As an entitlement community, Concord is routinely monitored by HUD for compliance. During the most recent monitoring, it was recommended to update both the Uniform Relocation Assistance (URA) Policy and the Residential Anti-Displacement and Relocation Plan for consistency. The URA Policy details the requirements an entity must follow when a household voluntarily relocates either temporarily or permanently due to needed repairs, reconstruction, or reuse of the property. The Residential Anti-Displacement and Relocation Plan identifies the actions Concord will follow should an activity require relocation. All changes were guided by Concord's HUD representative in conjunction with newly offered HUD trainings.

Recommendation: Motion to approve revised policies and procedures manual for the City of Concord's Uniform Relocation Assistance (URA) Policy and the Residential Anti-Displacement and Relocation Plan.

- H. Consider authorizing the Police Department to apply for the COPS FY 2021 Community Policing Development Accreditation Program grant.** The Fiscal Year 2021 Community Policing Development (CPD) Accreditation Program funds are used to develop the capacity of law enforcement to implement community policing strategies by providing guidance on promising practices through the development and testing of innovative strategies; building knowledge about effective practices and outcomes; and supporting new, creative approaches to preventing crime and promoting safe communities. This includes support to law enforcement agencies seeking accreditation. No local match required.

Recommendation: Motion to authorize the Police Department to apply for the COPS FY 2021 Community Policing Development Accreditation Program grant.

- I. Consider authorizing the police department to apply for the FY 2021 Edward Byrne Memorial Justice Assistance Grant (JAG) Program-Local Solicitation.** Based on the formula from JAG, Concord is directly allocated \$10,207, a portion of which must be shared with Cabarrus County. The shared amount will be determined at a later time during the application process. No City match is required.

Recommendation: Motion to authorize the police department to apply for the FY 2021 Edward Byrne Memorial Justice Assistance Grant (JAG) Program-Local Solicitation.

- J. Consider authorizing the City Manager to accept \$25,000 from the NC Governor's Highway Safety Program to fund overtime expenses for traffic safety enforcement and to adopt a budget ordinance to appropriate the grant funds.** The police department received official notification of a \$25,000 grant award from the NC Governor's Highway Safety Program for the 21-22 fiscal year. The funds will be used for overtime traffic related enforcement expenses. The approval to apply was granted by City Council at their January 14, 2021 meeting. The official award documents have been received and will be presented to the City Manager for signature upon approval of acceptance of the grant funds. No City match is required.

Recommendation: Motion to authorize the City Manager to accept \$25,000 from the NC Governor's Highway Safety Program to fund overtime expenses for traffic safety enforcement and to adopt a budget ordinance to amend the FY 21-22 budget to appropriate the funds.

- K. Consider accepting an Offer of Dedication of an access easement and approval of the maintenance agreement.** In accordance with the CDO Article 4, the following access easements and maintenance agreements are now ready for approval: Oaklawn Project I, LLC (PIN 4681-02-3931) 9800 Harris Road; Table Rock RE Investments, LLC (PIN 5610-72-6291) 915 Concord Parkway South. Access easements and SCM maintenance agreements are being offered by the owners.

Recommendation: Motion to approve the maintenance agreements and accept the offers of dedication on the following properties: Oaklawn Project I, LLC and Table Rock RE Investments, LLC.

- L. Consider accepting an Offer of Infrastructure at Slatebrooks Drive in Midland, Campbell Farms PH 1 MP 2, The Wayforth at Concord PH 1, 2 and 3.** In accordance with CDO Article 5, improvements have been constructed in accordance with the City's regulations and specifications. The following are being offered for acceptance: 1545 LF of Water Line, 8 Valves, 4 Fire Hydrants, 1320 LF of Sanitary Sewer, 5 Manholes, and 3,342 LF of roadway.

Recommendation: Motion to accept the offer of infrastructure acceptance in the following subdivisions and sites: Slatebrooks Drive in Midland, Campbell Farms PH 1 MP 2, The Wayforth at Concord PH 1, 2 and 3

- M. Consider approving the City of Concord Housing Department's Emergency Housing Vouchers received from the American Rescue Plan Act of 2021.** The Housing Department received 26 vouchers to help assist individuals and families who are homeless, at risk of homelessness, fleeing or attempting to flee domestic violence, sexual violence, stalking or human trafficking.

Recommendation: Motion to accept the Emergency Housing Vouchers from the American Rescue Plan Act of 2021 in the amount of \$223,308.

- N. Consider accepting the semiannual debt status report as of June 30, 2021.** The City's debt report as of June 30, 2021 is presented for the City Council's review.

Recommendation: Motion to accept the City's semiannual debt status report as of June 30, 2021.

O. Consider acceptance of the Tax Office reports for the month of May 2021. The Tax Collector is responsible for periodic reporting of revenue collections for the Tax Collection Office.

Recommendation: Motion to accept the Tax Office collection reports for the month of May 2021.

P. Consider approval of Tax Releases/Refunds from the Tax Collection Office for the month of May 2021. G.S. 105-381 allows for the refund and/or release of tax liability due to various reasons by the governing body. A listing of various refund/release requests is presented for your approval, primarily due to overpayments, situs errors and/or valuation changes.

Recommendation: Motion to approve the Tax releases/refunds for the month of May 2021.

Q. Receive monthly report on status of investments as of May 31, 2021. A resolution adopted by the governing body on 12/9/1991 directs the Finance Director to report on the status of investments each month.

Recommendation: Motion to accept the monthly report on investments.

VIII. Matters not on the agenda

- TAC
- MTC
- Centralina Regional Council
- Concord/Kannapolis Transit Commission
- WSACC
- Public Art Advisory Committee
- Concord Family Enrichment Association
- PTT Committee
- Barber Scotia Community Task Force Committee
- Concord United Committee

IX. General comments by Council of non-business nature

X. Closed Session (if needed)

XI. Adjournment

*IN ACCORDANCE WITH ADA REGULATIONS, PLEASE NOTE THAT ANYONE WHO NEEDS AN ACCOMMODATION TO PARTICIPATE IN THE MEETING SHOULD NOTIFY THE CITY CLERK AT (704) 920-5205 AT LEAST FORTY-EIGHT HOURS PRIOR TO THE MEETING.

**AN ORDINANCE AMENDING THE ZONING ORDINANCE
OF THE CITY OF CONCORD, NORTH CAROLINA**

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by the North Carolina General Statute §160A-364 enacted an Official Zoning Ordinance for the City of Concord, North Carolina and the Area of Extraterritorial Jurisdiction on July 28, 1977; and

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by North Carolina General Statute §§160D-6-1 through §§160D-6-5, 160D-7-1 through 160D-7-6 , 160D-8-1 through 160D-8-8 and 160D-9-1 through 160D-9-51 may from time to time as necessary amend, supplement, change, modify or repeal certain of its zoning regulations and restrictions and zone boundaries; and

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by North Carolina General Statute §§160D-6-1 through §§160D-6-5, 160D-7-1 through 160D-7-6 , 160D-8-1 through 160D-8-8 and 160D-9-1 through 160D-9-51 does hereby recognize a need to amend the text of certain articles of the City of Concord zoning Ordinance.

NOW, THEREFORE, BE IT ORDAINED by the City Council of the City of Concord, North Carolina:

SECTION 1: That the following section of Concord Development Ordinance (CDO) Article 8 “Use Regulations” Section 8.8.4 “No Recreational Vehicles” be amended to the following:

8.8.4 NO RECREATIONAL VEHICLES

No bus, slide-in camper, utility trailer, camping trailer, self-contained travel trailer or house trailer (defined as a vehicular, portable structure built on a wheel chassis, designed to be towed by a self-propelled vehicle for use as a temporary dwelling, for travel, recreation and vacation uses, having a body width not to exceed eight (8) feet and a body length not exceeding forty (40) feet when equipped for road travel) shall be used for living, sleeping, or business purposes on any lot within the zoning jurisdiction of the City of Concord, except as provided below.

Camping trailers and self-contained travel trailers may be used as a temporary residence on residentially zoned property for no more than fourteen (14) days in any twelve (12) month period. This provision shall only be used on property where an occupied residence is located.

Camping trailers and self-contained travel trailers may be used as temporary security quarters for 1) Christmas tree sales lots and for 2) nonresidential construction projects greater than five (5) acres, and shall be permissible for the duration of the project/construction.

SECTION 2: That all remaining Articles and Sections of this Ordinance be renumbered to include the newly created Articles and Sections.

SECTION 3: That this Ordinance be effective immediately upon adoption.

Adopted in this June 8th, 2021.

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

ATTEST:

William C. Dusch, Mayor

Kim Deason, City Clerk

VaLerie Kolczynski, City Attorney

AN ORDINANCE TO AMEND CHAPTER 58 RECREATONAL VEHICLES

WHEREAS, the City Council of the City of Concord, North Carolina, has adopted a Code of Ordinances; and

WHEREAS, the City desires to amend the ordinance to address parking of recreational vehicles,

NOW, THEREFORE, BE IT ORDAINED by the City Council of the City of Concord, North Carolina, after due consideration and in the best interests of its citizens and property of Concord, that the Concord Code of Ordinances be amended as follows:

SECTION 1. Chapter 58 "Traffic and Vehicles", Section 58-256 (c) "Parking and Storage of Certain Vehicles" be amended to the following:

Sec. 50-256. – Parking and storage of certain vehicles

(c) Recreational vehicles (as defined in G.S. 20-4.01(32a) except truck campers and conversion vehicles), trailers and boats stored on trailers, shall not be parked or stored on any predominately residential public right-of-way within the city, or on any unpaved portion of a front yard.

SECTION 2. That all remaining Articles and Sections be renumbered to include the newly created Articles and Sections.

SECTION 3. This Ordinance be effective immediately upon adoption.

Adopted this 8th day of July 2021

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

ATTEST:

William C. Dusch, Mayor

Kim Deason, City Clerk

VaLerie Kolczynski, City Attorney

DATE: June 15, 2021

CASE: TA-06-21 Text Amendment (Recreational Vehicles)

PREPARED BY: Kevin Ashley, AICP –Deputy Planning Director

BACKGROUND

Due to some enforcement and administration issues, the staff is proposing a simple amendment to the CDO and a portion of the City Code to address the parking and temporary residential use of travel trailers/recreational vehicles on residential property. The current portion of the CDO simply states that no RVs/campers, etc. may be utilized as a temporary residence.

The staff feels that it may be reasonable to clarify this portion to allow very limited residential use (for visitors) on a developed residential parcel. The amendment to the CDO allows for the use for a period of fourteen (14) days one time during any twelve (12) month period. The proposed amendment also includes allowing the use for Christmas tree lots and nonresidential construction projects greater than five (5) acres, for use as security measures.

The City Code portion proposes to prohibit the storing of RVs and travel trailers on predominately residential public rights-of-way or on any unpaved portion of a front yard.

The amendment is in approval form and at the Commission's concurrence, it may be referred to Council for public hearing.

8.8.4 NO RECREATIONAL VEHICLES

~~No Recreational Vehicles shall be permitted as a Temporary Use or Structure. No bus, slide-in camper, utility trailer, camping trailer, self-contained travel trailer or house trailer (defined as a vehicular, portable structure built on a wheel chassis, designed to be towed by a self-propelled vehicle for use as a temporary dwelling, for travel, recreation and vacation uses, having a body width not to exceed eight (8) feet and a body length not exceeding forty (40) feet when equipped for road travel) shall be used for living, sleeping, or business purposes on any lot within the zoning jurisdiction of the City of Concord, except as provided below.~~

~~Camping trailers and self-contained travel trailers may be used as a temporary residence on residentially zoned property for no more than fourteen (14) days in any twelve (12) month period. This provision shall only be used on property where an occupied residence is located.~~

~~Camping trailers and self-contained travel trailers may be used as temporary security quarters for 1) Christmas tree sales lots and for 2) nonresidential construction projects greater than five (5) acres, and shall be permissible for the duration of the project/construction.~~

(City Code Section 58-256(c)) Recreational vehicles (as defined in G.S. 20-4.01 (32a) except truck campers and conversion vehicles), trailers and boats stored on trailers shall not be parked or stored on any predominantly residential public right-of-way within the city nor on any unpaved portion of a front yard.



Staff Report

City Council

DATE: July 8, 2021

CASE: TA-05-21 - Staff Report for Text Amendments to the Historic Handbook Chapters 1, 3, 4, 5 and Appendix A relative to “160D and Minor” text changes

PREPARED BY: Katherine Godwin, Senior Planner

BACKGROUND:

The City is currently in the process of updating the CDO to reflect changes in the General Statutes as specified in Chapter 160D that was a result of consolidation of County (Chapter 153A) and the City/Town (Chapter 160 A) portions of General Statutes in order to create a uniform and consistent set of statutes with common development regulations.

As a result, the Historic Preservation Commission and staff have also reviewed the Historic Handbook for any changes necessary due to 160D as well as identifying other minor changes listed below:

- Replacing the terms “Design Guidelines” with “Design Standards” and “guide” with “resource”
- Replacing “Appendix A The Secretary of the Interior’s Standards for Rehabilitation and Guidelines for Historic Buildings” with the updated “The Secretary of the Interior’s Standards for Rehabilitation”
- Changing text in “Chapter 4: Local Standards” to match the updated “The Secretary of the Interior’s Standards for Rehabilitation”
- Changing the meeting date, time and location for the Historic Preservation Commissions Meetings in “Chapter 3: Working with the Commission”
- Updating Concord Development Ordinance and Historic Handbook references in “Chapter 3: Working with the Commission”
- Changing the department name from Planning Department to Planning and Neighborhood Development Department in “Chapter 3: Working with the Commission”
- Changing formatting to include headers on all sections of the Handbook and renumbering portions of “Chapter 4: Local Standards”

Also, there is a need to clarify contradicting language in Chapter 5- Section 8: Landscaping and Trees. One sentence in the introductory paragraphs reads “All trees that are removed should be replaced with a tree of similar species in an appropriate location unless no suitable location exists on the subject site.” Then the second recommendation reads: 2. Trees which are removed shall be replaced by a species which, upon maturity, is similar in scale to the removed specimen. For example, canopy trees shall be replaced with canopy trees, and understory trees with understory

trees.” The Historic Preservation Commission and staff recommend changing the first sentence to read “All trees that are removed shall be replaced with a tree of similar species in an appropriate location unless no suitable location exists on the subject site.” so that there is consistency in this requirement. The Historic Preservation Commission also recommends removing “For example, canopy trees shall be replaced with canopy trees, and understory trees with understory trees.” from the second recommendation.

The Historic Preservation Commission voted unanimously at their June 9th meeting to forward these text amendments to the Planning and Zoning Commission, requesting that the Planning and Zoning Commission forward the Historic Handbook amendments to City Council with a recommendation of approval. The Planning and Zoning Commission voted unanimously at their June 15th meeting to forward these text amendments to City Council with a recommendation of approval.

SUMMARY OF REQUEST

These changes involve the rewrite of portions of four chapters and one appendix of the Historic Handbook. Some changes are formatting and clarification only, but the most substantive changes occur to Chapter 5 Section 8: Landscaping and Trees and Appendix A: The Secretary of the Interior’s Standards for Rehabilitation. These changes are shown in detail in the attached strikethrough document. In summary the major changes involve:

- Clarifying Chapter 5 Section 8
- Replacing “Guidelines” with “Standards” and “guide” with “resource”
- Replacing Appendix A
- Changing text in Chapter 4 to match Appendix A and renumbering portions
- Updating Chapter 3 to have the correct meeting date, time and location, CDO and handbook references, and department name
- Changing formatting to include headers on all chapters

Staff will conduct a thorough presentation of all of the changes to ensure the Council understands these changes.

STAFF RECOMMENDATIONS

Motion to adopt an ordinance amending Chapters 1, 3, 4, 5, and Appendix A of the Historic Handbook relative to “160D and Minor” text changes.

FENCES and WALLS
..... Chapter 5 – Section 9 – Pg 43

DRIVEWAYS, WALKWAYS,
and PARKING
..... Chapter 5 – Section 10 – Pg 47

LIGHTING and
TRANSFORMERS
..... Chapter 5 – Section 11 – Pg 48

MECHANICAL and
INCIDENTAL EQUIPMENT
..... Chapter 5 – Section 12 – Pg 49

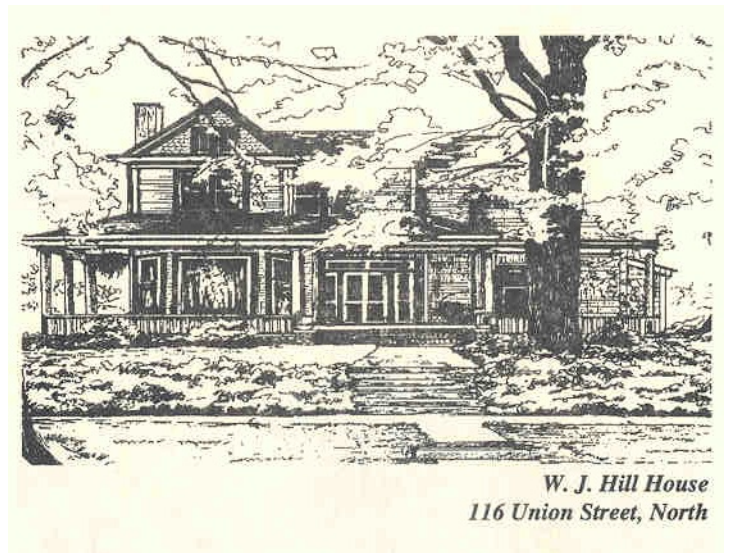
DEMOLITION..... Chapter 5 – Section 13 - Pg 50

HOUSING CODE..... Chapter 5 – Section 14 – Pg 51

SECRETARY OF THE INTERIOR’S
STANDARDS FOR REHABILITATION
[and GUIDELINES FOR HISTORIC BUILDINGS](#)
..... Appendix A – Pg 52

TREE CARE and MAINTENANCE..... Appendix B – Pg 102

REFERENCES..... Appendix C – Pg 115



*W. J. Hill House
116 Union Street, North*



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Chapter 1:

PREFACE



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The Historic Preservation Commission's authority and the ~~guidelines~~ standards of the Historic Handbook are incorporated into the City's Zoning Ordinance by reference. This "handbook" was originally published and adopted in 1983. Since that time, Concord's Historic Districts have grown in popularity and continue to be focal points of the community. The revised and expanded handbook is intended to further enhance the preservation efforts of Concord's Historic Districts.

The handbook explains how the regulations work and answers the most frequently asked questions about living in a Historic District. It also provides background about the history and the architecture of Concord's Historic Districts. It illustrates the importance of physical features and sound site planning practice in the process of historic preservation. Additionally, the handbook is intended to serve as a supplement to the City of Concord Zoning Ordinance and as a ~~guide~~ resource and reference manual for the Historic Preservation Commission in their deliberations.

Included in this information is a glossary of common architectural terms and a list of reference materials. Also included is The Secretary of the Interior's Standards for Rehabilitation ~~and Guidelines for Rehabilitating Historic Buildings~~, the basis for a majority of the design requirements of the Districts. Whenever possible, photographs and illustrations have been included as examples of desirable features, details, and architectural styles.

One purpose of traditional zoning is to plan a community's ultimate physical design. Conversely, historic zoning is designed to preserve significant architectural and historical character. Historic zoning encompasses a specific geographical area and may include properties which have no distinctive historic features; however, combined with the properties which have such features, a total historic character is created.

Concord's Historic Districts consist of three such areas. The North and South Union Street Historic Districts were established in 1982. In 1988, the Edgewood Neighborhood was designated as a Historic District. The North and South Union Street Historic Districts are listed in "The National Register of Historic Places," whereas the Edgewood District is a locally designated district.

With the first designations, the Concord Historic District Commission was established in order to promote, enhance and preserve the character of the district, and to administer the Commission's Ordinance. With the passage of Senate Bill 139 in 1989, the North Carolina General Statutes were amended to allow consolidation of historic district and historic properties commissions into

- Provide technical advice to property owners concerning restoration and the treatment of architectural features.
- Delay the demolition of important structures within Historic Districts for up to 365 days in order to explore alternatives.
- Make recommendations to the Board of Adjustment and the Planning and Zoning Commission regarding proposed zoning changes and related matters within the Districts.

The Commission meets the ~~third Thursday~~ second Wednesday of each month at ~~7:00~~6:30 p.m. in the City Council Chambers of City Hall (~~35 Cabarrus Avenue West~~26 Union Street, South). Since the Commission is a quasi-judicial body under North Carolina law, certain rules of procedure must be followed. These procedures include official notification of adjacent property owners, public advertisement in the newspaper, and placement of a public hearing sign on the property.

The Commission's review criteria for Certificates of Appropriateness include taking into account the historic and visual aspects that give the Districts their character, as well as reviewing the proposal's compatibility. Additional information on approval criteria may be found in the ~~Appendix B, "Approval Requirements,"~~ Appendix ~~CA,~~ The Secretary of the Interior's Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings, and in Article ~~4-9~~ – Section ~~12-8~~ of the City of Concord ~~Unified~~ Development Ordinance.

B. OBTAINING A CERTIFICATE OF APPROPRIATENESS

Prior to new construction, demolition, installation of permanent identification signs, and most alteration and rehabilitation activities within the Districts, a Certificate of Appropriateness must be obtained. Alterations to the interior of the structures are not subject to Certificates of Appropriateness. In some matters the City of Concord Planning and Neighborhood Development Department can issue a Certificate. If the proposed alteration is one that the Planning and Neighborhood Development Department can approve, then the applicant does not have to go before the Historic Preservation Commission. The types of work for which Certificates are required are shown in the "Approval Requirement Needs" section at the beginning of the Handbook.

The alteration of any site or exterior feature which is not specifically listed in ~~Appendix B~~ the "Approval Requirement Needs" table will require approval by the Historic Preservation Commission for a Certificate of Appropriateness. The Zoning Administrator shall have the option of referring any item that could be approved within the Planning and Zoning Neighborhood Development Department to the Historic Preservation Commission for approval.

A property owner must obtain a Certificate of Appropriateness prior to the issuance of a building permit, or any other permit required by the City for construction, alteration, or demolition of a structure within a District. Prior to beginning work on a house or property (including extensive tree pruning and removal), the owner should contact the City's Planning and Neighborhood

Development Department for a determination on whether a Certificate of Appropriateness will be required.

If the work to be performed requires Historic Preservation Commission approval, an application for a Certificate of Appropriateness must be filed. The application and processing is required to be submitted to the Planning and Neighborhood Development Department at least 28 days prior to a regularly scheduled Commission meeting. Application forms may be obtained from the Planning and Neighborhood Development Department or the City's website.

C. APPEALS

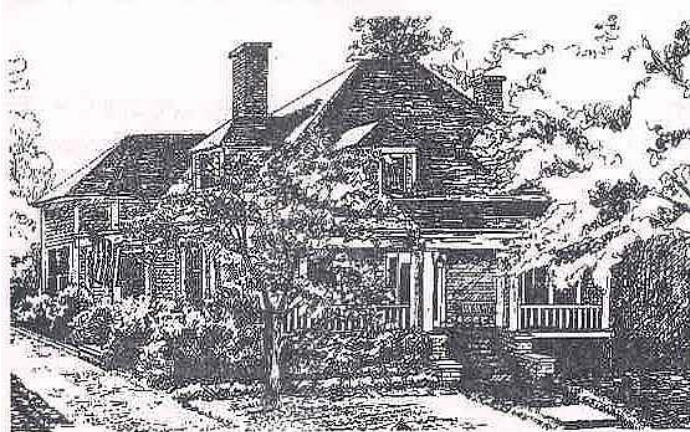
Decisions of the Historic Preservation Commission may be appealed to the Board of Adjustment. An appeal may be taken by the applicant or by any other aggrieved party. The appeal application must be filed with the Zoning Administrator within 30 days of the decision. Any appeals from the Board of Adjustment are to be taken to the Superior Court of Cabarrus County.

The appeal of a decision by the Historic Preservation Commission to the Board of Adjustment is in the nature of "certiorari." The aggrieved party cannot present new evidence but must show that the Commission failed to follow the appropriate administrative or procedural regulation or that the decision was contrary to the evidence or was arbitrary and capricious.

D. ENFORCEMENT

Enforcement of any of the provisions of the City of Concord Zoning Ordinance is done by the Code Enforcement Department. A Certificate of Appropriateness must be obtained before issuance of a building permit or any other permit needed for constructing or altering buildings, structures, or signs. Failure to do so is a zoning violation and if not corrected or remedied will result in legal action.

Chapter 4: LOCAL STANDARDS and GENERAL POLICIES



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Local Standards and General Policies are statements based on the Commissioner's past actions and experiences in administering Historic requirements.

Artificial siding:—The Commission views each of Concord's Historic Districts as a whole and thus more than the sum of its individual parts. For this reason, all buildings within the Districts are deemed to be of architectural significance, unless otherwise expressed by the Commission.

1. Artificial Siding:

Because artificial siding is not considered an authentic, historical material, it is prohibited from being used on structures defined by the Commission as Pivotal and Contributing to the Historic Districts. Artificial siding would be considered on structures defined by the Commission as Non-Contributing, Intrusive or Fill properties if the following conditions are met:

A. Vinyl Siding

- The facility is considered not to have existing wood damage or other forms of structural damage that would be concealed by vinyl siding.
- That the structure must have been built during a time and consistent in style with a time during which vinyl siding was commonly used in new construction.
- The application of the vinyl siding nor the vinyl siding itself shall not alter even in the smallest detail historical features that may exist and are considered by the Concord Historic Preservation Commission as important in defining the historic character of the structure.

Where artificial siding is considered, the Commission will require a sample of the siding be submitted at the time of the hearing, and that the applicant be present at the Commission hearing.

Approval of the application for artificial siding to any building in the Historic Districts does not automatically permit or prohibit the issuance of a Certificate of Appropriateness for other

projects which involve the application of artificial siding to existing structures in the Districts.

B. Synthetic Stucco: Because synthetic stucco is not considered an authentic, historical material, it is prohibited from being used on structures defined by the Commission as Pivotal and Contributing to the Historic Districts.

Synthetic stucco would be considered on structures defined by the Commission as Non-Contributing, Intrusive, or Fill properties if the following conditions are met:

- Its use as a building material shall be limited to a maximum of ten percent (10%) on any one exterior building elevation.
- It shall not be used in any condition below 8ft above grade.
- Its use should be limited to detailed areas on masonry buildings such as cornices and window / door headers and not used in large expanses of wall area. The use of this material in the construction of architectural columns is inappropriate.
- If used it shall be detailed with appropriate reveals and other details to simulate the use of cut stone.
- Its use is prohibited on any existing structure with regard to additions, renovations, or infill wall areas.

C. Synthetic Spray-On Coatings: Because synthetic spray-on coatings (i.e. spray-on vinyl/ spray-on ceramic) are not considered an authentic, historical material, and there is a potential for loss of detail with its use or application, and due to questionable removal and reversal processes related to the product, it is prohibited from being used on structures located within the Concord Historic Districts.

D. Hardiplank and similar synthetic materials that replicate historic materials such as brick, wood, and clay: Modern synthetic products are created to give the appearance of historic materials. The materials are historically inaccurate and should not be used on Contributing or Pivotal structures or as part of additions to those buildings. Accessory buildings for Pivotal and Contributing structures should utilize the same siding and roof material as the primary structure. If the primary structure is not Contributing or Pivotal, new accessory structures, such as detached garages or outbuildings, may utilize these materials. In any case, prefabricated storage buildings that are not visible from the street, may utilize synthetic materials (excluding vinyl, metal, or plastic) if they are equal to or under 144 square feet.

2. Alterations: Alterations having no historical basis shall be avoided whenever possible. Any type of alteration of exterior features of a building, site, or environment within the Historic Districts which is not specifically listed within these regulations shall be referred to

the Historic Preservation Commission for action on the issuance of a Certificate of Appropriateness.

3. **Staff Referral of Proposed Projects:** The Zoning Administrator shall have the option of referring any item that could be approved at the staff level to the Historic Preservation Commission for approval.
4. **Projects Within Right-of-Ways:** Any utilities or other public improvement projects to be constructed within a street or utility right-of-way which have the potential of damaging root systems of trees shall require Commission approval.
5. **Use of The Secretary of the Interior's Standards:** The Commission officially adopts The Secretary of the Interior's Standards for Rehabilitation~~and Guidelines for Rehabilitating Historic Buildings~~, (Appendix ~~CA~~), as part of this document in order to provide guidance standards for rehabilitation and to assist in administration of its duties. Recommendations that are not found in the Historic Handbook may be found in Appendix ~~CA~~.
 - A. A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
 - B. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize the property shall be avoided.
 - C. Each property shall be recognized as a physical record of its time, place and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
 - D. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
 - E. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.
 - F. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
 - G. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
 - H. Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.

- I. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
- J. New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.
- ~~6. Every reasonable effort shall be made to provide a compatible use for a property which requires minimal alteration of the building, structure, site or environment, or to use the property for its originally intended purpose.~~
- ~~7. Original qualities or character of a building, structure, site or environment shall not be destroyed. The removal, alteration or destruction of any historic material or distinctive feature shall be avoided.~~
- ~~8. All buildings, structures and sites shall be recognized as products of their own time. Alterations that have no historical basis and which seek to create an earlier appearance shall be discouraged.~~
- ~~9. Changes which may have taken place in the course of time are evidence of the history and development of a building, structure or site and its environment. These changes may have acquired significance in their own right and this significance shall be recognized and respected.~~
- ~~10. Distinctive stylistic features shall be repaired rather than replaced, whenever possible. In the event replacement is necessary, the new material should match the material being replaced in composition, design, color, texture and other visual qualities. Repair or replacement of missing architectural features, should be based on accurate duplications of features, substantiated by historic, physical or pictorial evidence rather than conjectural designs or the availability of different architectural elements from other buildings or structures.~~
- ~~11. Surface cleaning shall be undertaken with the gentlest means possible. Sandblasting and other harsh cleaning methods that may damage historic building materials is discouraged, although each case will be judged individually.~~
- ~~12. Every reasonable effort shall be made to protect and preserve archeological resources affected by, or adjacent to, any project.~~
- ~~13. Contemporary design for alterations and additions to existing properties shall be encouraged when such alterations and additions do not destroy significant historical, architectural or cultural material, and such design is compatible with the size, scale, color, material and character of the property, neighborhood or environment.~~

~~14. New additions or alterations shall be construed in such a manner as to preserve the essential form and integrity of the structure, should the addition or alteration be removed.~~

15.6. Historically, all structures within the districts and in older neighborhoods throughout the City were “site built,” and the use of prefabricated building materials is a fairly recent development. As a result, prefabricated metal utility buildings and carports are inappropriate throughout the districts, however, their use will be considered by the Commission on a case by case basis.

16.7. The presence of lead-based paint can lead to serious health problems for some individuals. Many historic homes have lead paint somewhere on the premises. If deteriorating lead paint is detected, removal and abatement should be undertaken with the utmost care by experienced professionals.

DESIGN ~~GUIDELINES AND RECOMMENDATIONS~~ STANDARDS: NEW CONSTRUCTION

1. New construction shall coordinate in material, scale, size, site position, spatial relationship and details with immediate neighbors within one hundred feet (100') of the proposed construction.
2. Where feasible, roof forms should be consistent and compatible to others in the district. Large flat expanses of walls or roofs should be avoided.
3. New construction should avoid A-frame, dome, shed, and flat roofs.
4. Locate and size window and door openings so they are compatible in placement, orientation, spacing, proportion, size and scale with the surrounding historic buildings.
5. The historic Preservation Commission encourages compatible contemporary design in order to reflect accurately the differences between historic buildings and newer structures.
6. Introduce features such as porches, chimneys, bays and architectural details as appropriate so that the texture of new residential structures is compatible with surrounding historic structures. Detailing on new structures should be consistent with its overall scheme and design.
7. Contemporary substitute materials such as hardiplank may be approved on a case by case basis for new structures. In order to qualify for use in new construction, these materials must have a demonstrated record of overall quality and durability. The physical properties of substitute materials must be similar to those of the historic materials they mimic. When considering substitute materials, the closer an element is to the viewer, the more closely the material and craftsmanship should match the original. The appropriateness of substitute materials shall be reviewed on an individual basis.
8. Vinyl siding for new construction is not appropriate.

- Green Tip -

**The use of
locally available building
materials reduced energy**

Chapter 5 – Section 2: NEW ADDITION CONSTRUCTION

Over time buildings change to accommodate changing needs and lifestyles. When making an alteration to a historic building the challenge is to balance the individual property owner's need with the community's intent to maintain architectural integrity. Wherever possible, new additions to buildings shall be done in such a manner that if they were to be removed in the future, the essential form and integrity of the original building would not be impaired. New addition design for historic structures shall be compatible with the size, scale, color, material and character of the neighborhood, the building and its environment. Although designed to be compatible with the historic building, an addition should be discernible from the original building.

Guidelines: Additions DESIGN STANDARDS: NEW ADDITION CONSTRUCTION

1. Site new additions as inconspicuously as possible, preferably on rear elevations and where historic character defining features are not damaged, destroyed, or obscured.
2. Additions on the front elevation will not be allowed.
3. Inset additions from rear building corners to differentiate them from the existing building and to reduce public visibility.
4. Design additions so they are compatible with the existing building in height, massing, roof form and pitch.
5. Reduce the visual impact of an addition on a historic building by limiting its scale and size. Do not overpower the site or substantially alter the site's proportion of built area to green space.
6. New additions should be installed in such a manner that would allow the home to be reverted to its original state without damaging historic features.
7. New additions should be compatible in character but use a contemporary design in order to differentiate additions from the historic structure.
8. Windows in additions should be similar to those in the original buildings in their proportions, spacing, and materials.
9. Select exterior surface siding and details that are compatible with the existing building in material, texture, color, and character.

Chapter 5 – Section 3: NEW ACCESSORY STRUCTURE CONSTRUCTION

A number of original garages and smaller outbuildings, and even a few carriage houses, survive in the historic district. Many echo the materials, the details, and the roof form of the main house on the site and contribute to the architectural character of the district. Through their siting and relationship to the houses, the streets, and the alleys, the accessory buildings contribute to the historic character of the district as well. Early garages were typically single-bay structures located in the rear yard at the end of the driveway. Early storage buildings and sheds were usually small frame structures sited toward the back of the rear yard and were generally not visible from the street.

DESIGN GUIDELINES AND RECOMMENDATIONS STANDARDS: NEW ACCESSORY STRUCTURE CONSTRUCTION

1. Original carriage houses, garages, and accessory structures should be retained and preserved in their original location.
2. Retain and preserve all architectural features that are character defining elements of carriage houses, garages and accessory structures, including foundations, steps, roof form, windows, doors, architectural trim, and lattices. Original style and character of carriage houses and accessory structures, doors and openings shall be maintained.
3. Retain and preserve historic garages and outbuilding materials, such as siding, masonry, roofing materials, and wooden trim. If replacement is necessary, use new materials that match the historic materials in composition, dimension, shape, color, pattern, and texture.
4. If replacement of an element or a detail is necessary, replace only the deteriorated item to match the original in size, scale, proportion, material, texture, and detail.
5. If an original carriage house, garage or outbuilding is completely missing, replace it with either a reconstruction based on accurate documentation or a new design compatible with the historic character of the main building or historic accessory structures in the district.
6. Keep the proportion of new garages and accessory structures compatible with the proportion of the main house. Typically these buildings were smaller in scale than the main house.
7. New garages and accessory structures must use traditional roof forms, materials, and details compatible with the main building or historic accessory structures in the district.
8. Locate new garages and accessory structures in rear yards and in traditional relationship to the main buildings.

A number of artificial sidings have been developed since the construction of many of the structures in the Districts. Artificial products that are found on some structures may include asbestos shingles or vinyl or aluminum siding. Artificial or synthetic siding is not appropriate for additions on Pivotal and Contributing structures or for large accessory structures. Artificial and synthetic siding, when used for additions or accessory structures on lots containing noncontributing, fill, or intrusive structures, may be considered on a case by case basis.

DESIGN ~~GUIDELINES AND RECOMMENDATIONS~~ STANDARDS: SIDING AND EXTERIOR MATERIALS

1. To the greatest extent possible, wood siding should be preserved and maintained.
2. In the replacement of wood siding, materials should match the original as closely as possible. “Rough-sawn” siding should be avoided.
3. The use of artificial siding to cover original siding is prohibited.
4. The removal of artificial siding and restoration of original siding materials is encouraged.
5. Artificial and synthetic siding is permitted for new construction on a limited basis in coordination with this section and Chapter 4: “Local Standards and General Policies” of this Handbook.

- Green Tip -

Existing “old growth” wood siding and existing masonry materials have already made their carbon footprint. Maintain existing materials to the greatest extent possible to diminish raw material usage and energy usage that would be required for the production of new materials!

construction of primary structures (2) New construction of accessory buildings on lots with buildings not designated as Pivotal or Contributing, and (3) New construction of additions to structures not designated as Pivotal or Contributing.

For the most part, only wooden shutters should be installed in the districts. The shutters should match the size of the window opening, sash spacing, and should be attached to the casing and not to the siding.

Storm windows and doors should not obscure the appearance or conflict with the style of the inner door and window and should look like an original feature, not an accessory. Unpainted aluminum storm doors and windows should be avoided.

Awnings and canopies constructed of canvas are appropriate with commercial structures and in some instances with residential structures. Types of residential structures with which awnings are most compatible are Bungalow, Queen Ann, and Colonial Revival. Awnings are not appropriate on structures where shutters were historically used. Aluminum awnings or canopies are inappropriate. Canopies and awnings shall reflect a close visual association with the fenestration involved.

DESIGN RECOMMENDATIONS STANDARDS: FENESTRATIONS

1. Choose windows that are appropriate for the style of building, maintain vertical emphasis, and avoid large single paned units.
2. Use doors that are appropriate for the style of building while avoiding flat-surfaced doors, those with small decorative glass panels, and pre-finished window/side lite art glass units.
3. Avoid unpainted aluminum storm doors, and select a style which does not distort or change the appearance of the inner door.
4. Awnings or canopies should be mounted within the opening, directly on the window or door frame, or as an alternate, just outside the opening. The awning or canopy should reflect a close visual association with the opening. Awnings and canopies attached to roofs are inappropriate.

Window and Door Repair and Maintenance

- Protect and maintain existing windows and doors in appropriate ways:
- Maintain caulking and glazing putty to prevent air or water infiltration around glass.
- Weatherstrip windows and doors to prevent moisture and air infiltration.
- Check sills and thresholds to ensure that water runs off and does not collect.
- Maintain a sound paint film on all wooden windows and doors.
- Monitor the condition of wooden windows and doors.

DESIGN ~~GUIDELINES AND RECOMMENDATIONS~~ STANDARDS: PORCHES

1. Alterations to original porches that have no historic basis are not appropriate. Repair original materials if possible. If replacement is necessary, replace with matching material.
2. Composite/substitute materials may be approved for Pivotal and Contributing structures by the Historic Preservation Commission for porch and deck flooring on a case-by-case basis, provided that one of the following four circumstances are present: unavailability of historic materials, unavailability of a skilled craftsman to reproduce the historic material, inherent flaws in original materials or design, and code-required changes.
3. Substitute materials shall be compatible with historic materials in appearance, physical properties, and general installation.
4. Enclosure of side or rear porches and balconies is discouraged. If enclosure of a side or rear porch is required for a new use, design the enclosure so that the historic character and features of the porch are preserved.
5. Decks may only be located in the rear of the property.
6. Design decks to be compatible in material, color, and detail with the historic building.
7. Construct decks so that they can be removed in the future without damaging the historic structure.
8. Construct decks so that there is the least possible loss of historic fabric. Also, ensure that character-defining features of the historic building are not obscured, damaged, or destroyed.
9. Inset decks from the corner of the primary structure where necessary in order to prevent visibility from the street.
10. Handicap accessible ramps should be temporary structures and able to be removed once no longer needed. Ramps deemed appropriate by a Certificate of Appropriateness should not detract from the aesthetic and architectural character of the principle dwelling unit nor should the removal of a ramp jeopardize any portion of the unit's structural integrity. To the greatest extent feasible, handicap ramps should be located where they are not visible from the street.

DESIGN ~~GUIDELINES AND RECOMMENDATIONS~~ STANDARDS: ROOFING

1. New construction should avoid A-frame, dome, shed and flat-alone roof shapes.
2. New construction should avoid the roof being more than one-half the building's height.
3. Use materials in new construction that are consistent with the style of the building; materials should be unobtrusive in texture as well as color.
4. Skylights and solar energy hardware are to be considered on a case by case basis, and when proposed, should be located in such a manner as to not be readily visible from the street.
5. Roof shapes, texture and material should be compatible with new construction as well as with immediate buildings.
6. Original roof material should be maintained and/or replaced with like roofing if possible.
7. The use of synthetic products that mimic historic materials are inappropriate in most circumstances including the replacement of historic materials and on Pivotal and Contributing structures. These materials may be used on a case by case basis.
8. When replacing asphalt shingles, darker color shingles should be used since they are more historically appropriate.

Roof Maintenance:

Protect and maintain the roofing system in appropriate ways:

- Repair leaks promptly to limit related damage to the roof and the building.
- Provide temporary protection to a leaking roof before repairs.
- Clean gutters and downspouts regularly.
- Eliminate any vegetation that may cause deterioration of the roof, the gutters, or the downspouts.
- Replace deteriorated flashing with first-quality flashing.
- Inspect the roof sheathing for signs of insect infestation or moisture damage.
- Provide adequate ventilation of the attic space to prevent condensation.
- Provide adequate anchorage for roofing material to guard against wind and moisture damage.

Chapter 5 – Section 8: LANDSCAPING and TREES

One of the most visible features of the Districts is the landscaping and the associated tree canopy. Activities which negatively impact any aspect of the landscape should be avoided, such as the removal of healthy trees and mature shrubs.

Tree health may be decided upon by the acquisition of a Tree Hazard Evaluation Report issued by the City Arborist or a report submitted by a certified arborist. Healthy trees are trees that have a hazard rating of 4 or lower. Removal of healthy trees over the size of 6 inches in diameter (measured 4 feet above ground) or pruning of healthy tree limbs over 6 inches in diameter requires Historic Preservation Commission review and approval. City staff may approved a Certificate of Appropriateness for the removal of healthy trees under 6 inches in diameter. Staff may also approve removal or pruning of unhealthy trees/limbs of any size and in any location if the tree is deemed hazardous by the Tree Hazard Evaluation Report. City Staff may refer any tree pruning or removal request to the Historic Preservation Commission.

All trees that are removed ~~should~~ shall be replaced with a tree of similar species in an appropriate location unless no suitable location exists on the subject site. Trees removed within street view must also have the stumps removed below ground level.

Planting of parking lot landscaping and buffering materials for new or converted nonresidential and multifamily dwellings must be in accordance with the City of Concord's Zoning Ordinance.

DESIGN ~~GUIDELINES AND RECOMMENDATIONS~~ STANDARDS: LANDSCAPING AND TREES

1. Property owners should provide proper care and maintenance for the existing landscape and landscape patterns.
2. Trees which are removed shall be replaced by a species which, upon maturity, is similar in scale to the removed specimen. ~~For example, canopy trees shall be replaced with canopy trees, and understory trees with understory trees.~~
3. Placement of all vegetation should not interfere with utilities and vehicular traffic (sight-triangles).
4. Residential uses should maintain the four characteristic placements for canopy: to soften building ground line, to separate public/private edge, to separate the boundary of the property, and to maintain property lines. It is also recommended that placement be varied and types of vegetation enhance the appearance of the existing property yet maintain and preserve its historical significance.

DESIGN ~~GUIDELINES AND RECOMMENDATIONS~~ STANDARDS: FENCES AND WALLS

1. Do not use high walls or fences to screen front yards.
2. Use materials such as natural stone, brick, wood, powder coated aluminum and iron.
3. Chain link or plastic materials are prohibited. Adding slats to existing chain link fences for screening purposes is prohibited.
4. Materials and style should coordinate with building and neighboring buildings as well as other walls and fences in the area.

Chapter 5 - Section 10: DRIVEWAYS, WALKWAYS and PARKING

The first residential driveways constructed in the districts were fairly narrow, because cars were smaller than they are now. Some of these driveways consist of two parallel “runners” with a grass strip in between. These driveways should be retained, and the style can serve as a model for new driveways. When new driveways are constructed, they should be separated from existing driveways by a grass strip, and should be narrow, since double width driveways are out of scale with the relatively small lots in the districts. Gravel and pavement are acceptable materials for driveways, as are some alternative materials such as cobblestone, brick, and pervious pavers.

Gravel may be appropriate in some instances for established commercial driveways and parking areas. The Zoning Ordinance dictates that some parking areas be paved; however, if the Historic Preservation Commission finds that gravel parking is more appropriate to the historic nature of the property, it can recommend to the Planning and Zoning Commission that a waiver of the paving requirement be granted. New nonresidential and some multifamily structures are subject to the Zoning Ordinance paving requirements and in the North Carolina State Building Code.

New walkways should consist of appropriate natural material including gravel, concrete, stone, brick or pervious pavers. Walkways should avoid prefabricated and imprinted stepping stones within front yards.

DESIGN GUIDELINES AND RECOMMENDATIONS STANDARDS: DRIVEWAYS, WALKWAYS, AND PARKING

1. Parking areas should not be the focal point of the property, and should be located in such a manner as to minimize their visibility from the street.
2. Trees should be planted or retained in order to maintain the tree canopy and to minimize the focus of the parking areas.
3. Excessive expanses of paving should be avoided.
4. Use vegetation screen or berms to reduce reflection and visual confusion. Within residential areas, integrate parking areas into landscaping and surface with the appropriate materials such as concrete, brick, crushed stone or gravel. In general, asphalt should only be used for areas not visible from the street; its use will be considered on a case by case basis by the Historic Preservation Commission.

- Green Tip -

Water-pervious materials such as gravel, crushed stone, or pervious paving blocks minimize runoff, increase infiltration, and are strongly encouraged for new or deteriorated driveways and off-street parking areas.

Chapter 5 – Section 11: LIGHTING and TRANSFORMERS

Adding security lights and transformers on either new or existing poles requires approval of the Commission. Security needs can usually be met with low profile lights which are compatible with the neighborhood.

Street lights typically occur at intersections and at midpoints on long blocks; concentrations of light are used in potentially hazardous areas. In commercial areas, lights are used to accent building facades and signs.

Residential lighting is historically minimal. Therefore, minor usage of low level landscape lighting added at ground level, with fixtures not visible from the street, that do not shine upon the building façade are appropriate. New exterior lighting units that produce higher levels of lighting or a fixture that is visible from the street are discouraged and require review and approval from the Historic Preservation Commission.

Removal of historic light fixtures is inappropriate.

DESIGN GUIDELINES AND RECOMMENDATIONS STANDARDS; LIGHTING AND TRANSFORMERS

1. Maintain subtle effects with selective spots of light rather than indiscriminate area lighting.
2. Do not concentrate light on facades and avoid casting light on surrounding properties.
3. Use lights to define spaces and accent vegetation.
4. Hide non-decorative light fixtures.
5. Do not use fixtures which are incompatible with existing details, styles, etc.

Green Tip:

The use of motion sensors and timers can limit the impact of exterior lighting and conserve energy at the same time.

Chapter 5 – Section 12: MECHANICAL and INCIDENTAL EQUIPMENT

The Commission recognizes that mechanical equipment such as air conditioning and central heat units, compressors, and electrical service equipment are necessary modern conveniences. However, these items, along with solar hardware and satellite dishes, should be placed out of public view. Equipment that is visible from the street should utilize shrubbery or fencing for screening from the street and adjacent property. When possible, refrigerant lines, vent pipes, and similar features should be located on the inside of the structure.

North Carolina State Building Code and ADA (Americans with Disabilities Act) require handicap ramps for some nonresidential and multifamily structures. Although their design is largely dictated by the Building Code, thoughtful planning can result in a design that requires little change to the appearance of the building and not be visible from the street.

DESIGN GUIDELINES AND RECOMMENDATIONS STANDARDS: MECHANICAL AND INCIDENTAL EQUIPMENT

1. Place mechanical equipment in areas which utilize existing features such as fences, walls, and landscaping to screen their view.
2. Integrate new screening walls into the design of the structure, making them as inconspicuous as possible.
3. Tie handicap ramps to existing porches and avoid alterations to the porches when practical. Construct new handicap ramps to match the existing features of the structure.

APPENDIX A: THE SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION

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INTRODUCTION

The Secretary of the Interior is responsible for establishing standards for all programs under the Departmental authority and for advising Federal agencies on the preservation of historic properties listed or eligible for listing in the National Register of Historic Places.

The Standards for Rehabilitation (codified in 36 CFR 67 for use in the Federal Historic Preservation Tax Incentives program) address the most prevalent treatment. "Rehabilitation" is defined as the "process of the returning a property to a state of utility, through repair or alteration, which makes possible an efficient contemporary use while preserving those portions and features of the property which are significant to its historic, architectural, and cultural values."

Initially developed by the Secretary of the Interior to determine the appropriateness of proposed project work on registered properties within the Historic Preservation Fund grant-in-aid program. The Standards for Rehabilitation have been widely used over the years – particularly to determine if a rehabilitation qualifies as a Certified Rehabilitation for Federal tax purposes. In addition, the Standards have guided federal agencies in carrying out their historic preservation responsibilities for properties in Federal ownership or control; and State and local officials in reviewing both Federal and nonfederal rehabilitation proposals. They have also been adopted by historic district and planning commissions across the country.

The intent of the Standards is to assist the long-term preservation of a property's significance through the preservation of historic materials and features. The Standards pertain to historic buildings of all materials, construction types, sizes and occupancy and encompass the exterior and interior of the buildings. They also encompass related landscape features and the building's site and environment, as well as attached, adjacent, or related new construction. To be certified for Federal tax purposes, a rehabilitation project must be determined by the Secretary to be consistent with the historic character of the structure(s), and where applicable, the district in which it is located.

As stated in the definition, the treatment "rehabilitation" assumes that at least some repair or alteration of the historic building will be needed in order to provide for an efficient contemporary use; however, these repairs and alterations must not damage or destroy materials, features or finishes that are important in defining the building's historic character. For example, certain treatments—if improperly applied—may cause or accelerate physical deterioration of the historic building. This can include using improper repointing or exterior masonry cleaning techniques, or introducing insulation that damages historic fabric. In almost all of these situations, use of these materials and treatments will result in a project that does not meet the Standards. Similarly, exterior additions that duplicate the form, material, and detailing of the structure to the extent that they compromise the historic character of the structure will fail to meet the Standards.

THE SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION

The Standards (Department of Interior regulations, 36 CFR 67) pertain to historic buildings of all materials, construction types, sizes, and occupancy and encompass the exterior and the interior, related landscape features and the building's site and environment as well as attached, adjacent, or related new construction. The Standards are to be applied to specific rehabilitation projects in a reasonable manner, taking into consideration economic and technical feasibility.

1. A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
2. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
4. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.
6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
7. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
8. Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
10. New additions and adjacent or related new construction shall be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

BUILDING EXTERIOR- MASONRY: BRICK, STONE, TERRA COTTA, CONCRETE, ADOBE, STUCCO AND MORTAR

Stone is one of the more lasting masonry building materials and has been used throughout the history of American building construction. The kinds of stone most commonly encountered on historic buildings in the U.S. include various types of sandstone, limestone, marble, granite, slate and fieldstone. Brick varied considerably in size and quality. Before 1870, brick clays were pressed into molds and were often unevenly fired. The quality of brick depended on the type of clay available and the brick-making techniques; by the 1870s—with the perfection of an extrusion process—bricks became more uniform and durable. Terra cotta is also a kiln-dried clay product popular from the late 19th century until the 1930s. The development of the steel-frame office buildings in the early 20th century contributed to the widespread use of architectural terra cotta. Adobe, which consists of sun-dried earthen bricks, was one of the earliest permanent building materials used in the U.S., primarily in the Southwest where it is still popular.

Mortar is used to bond together masonry units. Historic mortar was generally quite soft, consisting primarily of lime and sand with other additives. After 1880, Portland cement was usually added resulting in a more rigid and non-absorbing mortar. Like historic mortar, early stucco coatings were also heavily lime-based, increasing in hardness with the addition of Portland cement in the late 19th century. Concrete has a long history, being variously made of tuff, volcanic ash, and later, of natural hydraulic cements, before the introduction of Portland cement in the 1870s. Since then, concrete has also been used in its precast form.

While masonry is among the most durable of historic building materials, it is also very susceptible to damage by improper maintenance or repair techniques and harsh or abrasive cleaning methods.

<u>Recommended</u>	<u>Not Recommended</u>
<p>Identifying, retaining, and preserving masonry features that are important in defining the overall historic character of the building such as walls, brackets, railings, cornices, window architraves, door pediments, steps, and columns; and details such as tooling and bonding patterns, coatings, and color.</p>	<p>Removing or radically changing masonry features which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Replacing or rebuilding a major portion of the exterior masonry walls that could be repaired so that, as a result, the building is no longer historic and is essentially new construction.</p> <p>Applying paint or other coatings such as stucco to masonry that has been historically unpainted or uncoated to create a new appearance.</p> <p>Removing paint from historically painted masonry.</p> <p>Radically changing the type of paint or coating or its color.</p>

<u>Recommended</u>	<u>Not Recommended</u>
<p>Protecting and maintaining masonry by providing proper drainage so that water does not stand on flat, horizontal surfaces or accumulate in curved decorative features.</p>	<p>Failing to evaluate and treat the various causes of mortar joint deterioration such as leaking roofs or gutters, differential settlement of the building, capillary action, or extreme weather exposure.</p>
<p>Cleaning masonry only when necessary to halt deterioration or remove heavy soiling.</p>	<p>Cleaning masonry surfaces when they are not heavily soiled to create a new appearance, thus needlessly introducing chemicals or moisture into historic materials.</p>
<p>Carrying out masonry surface cleaning tests after it has been determined that such cleaning is necessary. Tests should be observed over a sufficient period of time so that both the immediate effects and the long-range effects are known to enable selection of the gentlest method possible.</p>	<p>Cleaning masonry surfaces without testing or without sufficient time for testing to be of value.</p>
<p>Cleaning masonry surfaces with the gentlest method possible, such as low-pressure water and detergents, using natural bristle brushes.</p>	<p>Sandblasting brick or stone surfaces using dry or wet grit or other abrasives. These methods of cleaning permanently erode the surface of the material and accelerate deterioration.</p>
<p>Inspecting painted masonry surfaces to determine whether repainting is necessary.</p>	<p>Using a cleaning method that involves water or liquid chemical solutions when there is any possibility of freezing temperatures.</p>
<p>Removing damaged or deteriorated paint only to the next sound layer using the gentlest method possible (e.g. hand scraping) prior to repainting.</p>	<p>Cleaning with chemical products that will damage masonry, such as using acid on limestone or marble, or leaving chemicals on masonry surfaces.</p>
<p>Applying compatible paint coating systems following proper surface preparation.</p>	<p>Applying high pressure water cleaning methods that will damage historic masonry and the mortar.</p>
<p>Repainting with colors that are historically appropriate to the building and the district.</p>	<p>Removing paint that is firmly adhering to, and thus protecting masonry surfaces.</p>
<p>Evaluating the overall condition of the masonry to determine whether more than protection and maintenance are required, that is, if repairs to the masonry fence will be necessary.</p>	<p>Using methods of removing paint which are destructive to masonry, such as sandblasting, application of caustic solutions, or high pressure waterblasting.</p>
	<p>Failing to follow manufacturers' product and application instructions when repainting masonry.</p>
	<p>Using new paint colors that are inappropriate to the historic building and district.</p>
	<p>Failing to undertake adequate measures to assure the preservation of masonry features.</p>

<u>Recommended</u>	<u>Not Recommended</u>
<p>Repairing masonry walls and other masonry features by repointing the mortar joints where there is evidence of deterioration such as disintegrating mortar, cracks in mortar joints, loose bricks, damp walls, or damaged plaster work.</p>	<p>Removing non-deteriorated mortar from sound joints, then repointing the entire building to achieve a uniform appearance.</p>
<p>Removing deteriorated mortar by carefully hand-raking the joints to avoid damaging the masonry.</p>	<p>Using electric saws and hammers rather than hand tools to remove deteriorated mortar from joints prior to repointing.</p>
<p>Duplicating old mortar in strength, composition, color, and texture.</p>	<p>Repointing with mortar of high portland cement content (unless it is the content of the historic mortar). This can often create a bond that is stronger than the historic material and can cause damage as a result of the differing coefficient of expansion and the differing porosity of the material and the mortar.</p>
<p>Duplicating old mortar joints in width and in joint profile.</p>	<p>Repointing with a synthetic caulking compound.</p>
<p>Repairing stucco by removing the damaged material and patching with new stucco that duplicated the old in strength, composition, color, and texture.</p>	<p>Using a “scrub” coating technique to repoint instead of traditional repointing methods.</p>
<p>Using mud plaster as a surface coating over unfired, unstabilized adobe because the mud plaster will bond to the adobe.</p>	<p>Changing a width or joint profile when repointing.</p>
<p>Cutting damaged concrete back to remove the source of deterioration (often corrosion on metal reinforcement bars). The new patch must be applied carefully so it will bond satisfactorily with, and match, the historic concrete.</p>	<p>Removing sound stucco; or repairing with new stucco that is stronger than the historic material or does not convey the same visual appearance.</p>
<p>Repairing masonry features by patching, piecing-in, or consolidating the masonry using recognized preservation methods. Repair may also include the limited replacement in kind – or with compatible substitute material-- of those extensively deteriorated or missing parts of masonry features when there are surviving prototypes such as terracotta brackets or stone balusters.</p>	<p>Applying cement stucco to unfired, unstabilized adobe. Because the cement stucco will not bond properly, moisture can become entrapped between materials, resulting in accelerate deterioration of the adobe.</p>
<p>Applying new or non-historic surface treatment such as water-repellent coatings to masonry only after repointing and only if masonry repairs have failed to arrest water penetration problem.</p>	<p>Patching concrete without removing the source of deterioration.</p>
	<p>Replacing an entire masonry feature such as a cornice or balustrade when repair of the masonry and limited replacement of deteriorated or missing parts are appropriate.</p>
	<p>Using a substitute material for the replacement part does not convey the visual appearance of the surviving parts of the masonry feature or that is physically or chemically incompatible.</p>
	<p>Applying waterproof, water-repellant, or non-historic coatings such as stucco to masonry as a substitute for repointing and masonry repairs.</p>

<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire masonry feature that is too deteriorated to repair – if the overall form and detailing are still evident – using the physical evidence to guide the new work. Examples can include large sections of a wall, a cornice, balustrade, column, or stairway. If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p>	<p>Coatings are frequently unnecessary, expensive, and may change the appearance of historic masonry as well as accelerated its deterioration.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing a masonry feature that is unrepairable and not replacing it; or replacing it with new feature that does not convey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and installing a new masonry feature such as steps or a door pediment when the historic feature is completely missing. It may be an accurate restoration using historical, pictorial, and physical documentation; or be a new design that is compatible with the size, scale, material, and color of the historic building. *</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced masonry feature is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new masonry feature that is incompatible in size, scale, material, and color.</p>

*The aforementioned work represents the particularly complex technical or design aspects of rehabilitation projects and should only be considered after the preservation concerns listed above have been addressed.

BUILDING EXTERIOR-WOOD:

Because it can be easily shaped by sawing, planing, carving, and gouging, wood is used for architectural features such as clapboards, cornices, brackets, entablatures, shutters, columns and balustrades. These wooden features, both functional and decorative, may be important in defining the historic character of the building and thus their retention, protection, and repair are important in rehabilitation projects. Wood has played a central role in American building during every period and in every style.

Whether as structural membering, exterior cladding, roofing, interior finishes, or decorative features, wood is frequently an essential component of historic and older buildings.

<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Identifying, retaining, and preserving wood features that are important in defining the overall historic character of the building such as siding, cornices, brackets, window architraves, and doorway pediments; and their paints, finishes, and colors.</p>	<p>Removing or radically changing wood features which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Removing a major portion of the historic wood from a facade instead of repairing or replacing only the deteriorated wood, then reconstructing the facade with new material in order to achieve a uniform or “improved” appearance.</p> <p>Radically changing type of finish or its color or accent scheme so that the historic character of the exterior is diminished.</p> <p>Stripping historically painted surfaces to bare wood, then applying clear finishes or stains in order to create a “natural look.”</p> <p>Stripping paint or varnish to bare wood rather than repairing or reapplying a special finish, i.e., a grained finish to an exterior wood feature such as a front door.</p>
<p><u><i>Recommended</i></u></p> <p>Protecting and maintaining wood features by providing proper drainage so that water is not allowed to stand on flat, horizontal surfaces or accumulate in decorative features.</p> <p>Applying chemical preservatives to wood features such as beam ends or outriggers that are exposed to decay hazards and are traditionally unpainted.</p> <p>Retaining coatings such as paint that help protect the wood from moisture and ultraviolet light. Paint</p>	<p><u><i>Not Recommended</i></u></p> <p>Failing to identify, evaluate, and treat the causes of wood deterioration, including faulty flashing, leaking gutters, cracks and holes in siding, deteriorated caulking in joints and seams, plant material growing too close to wood surfaces, or insect or fungus infestation.</p> <p>Using chemical preservatives such as creosote which can change the appearance of wood features unless they were used historically.</p>

<p>removal should be considered only where there is paint surface deterioration and as part of an overall maintenance program which involves repainting or applying other appropriate protective coatings.</p> <p>Inspecting painted wood surfaces to determine whether repainting is necessary or if cleaning is all that is required.</p> <p>Removing damaged or deteriorated paint to the next sound layer using the gentlest method possible (hand scraping and hand sanding), then repainting.</p> <p>Using with care electric hot-air guns on decorative wood features and electric heat plates on flat wood surfaces when paint is so deteriorated that total removal is necessary prior to repainting.</p> <p>Using chemical strippers primarily to supplement other methods such as hand scraping, hand sanding and the above-recommended thermal devices. Detachable wooden elements such as shutters, doors, and columns may – with the proper safeguards be chemically dip-stripped.</p> <p>Applying compatible paint coating systems following proper surface preparation.</p> <p>Repainting with colors that are appropriate to the historic building and district.</p> <p>Evaluating the overall condition of the wood to determine whether more than protection and maintenance are required, that is, if repairs to wood features will be necessary.</p>	<p>Stripping paint or other coatings to reveal bare wood, thus exposing historically coated surfaces to the effects of accelerated weathering.</p> <p>Removing paint that is firmly adhering to, and thus, protecting wood surfaces.</p> <p>Using destructive paint removal methods such as a propane or butane torches, sandblasting or waterblasting. These methods can irreversibly damage historic woodwork.</p> <p>Using thermal devices improperly so that the historic woodwork is scorched.</p> <p>Failing to neutralize the wood thoroughly after using chemicals so that new paint does not adhere.</p> <p>Allowing detachable wood features to soak too long in a caustic solution so that the wood grain is raised and the surface roughened.</p> <p>Failing to follow manufacturers' product and application instructions when repainting exterior woodwork.</p> <p>Using new colors that are inappropriate to the historic building or district.</p> <p>Failing to undertake adequate measures to assure the preservation of wood features.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing wood features by patching, piecing-in, consolidating, or otherwise reinforcing the wood using recognized preservation methods.</p> <p>Repair may also include the limited replacement in kind or with compatible substitute material of those extensively deteriorated or missing parts of features where there are surviving prototypes such as brackets, moldings, or sections of siding.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire wood feature such as a cornice or wall when repair of the wood and limited replacement of deteriorated or missing parts are appropriate.</p> <p>Using substitute materials for the replacement part that does not convey the visual appearance of the surviving parts of the wood feature or that is physically or chemically incompatible.</p>

<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire wood feature that is too deteriorated to repair if the overall form and detailing are still evident – using the physical evidence to guide the new work. Example of wood features include a cornice, entablature or balustrade.</p> <p>If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Designing and installing a new wood feature such as cornice or a doorway when the historic feature is completely missing. It may be an accurate restoration using historical, pictorial, and physical documentation; or be a new design that is compatible with the size, scale, material, and color of the historic building. *</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing an entire wood feature that is unrepairable and not replacing it; or replacing it with a new feature that does not convey the same visual appearance.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced wood feature is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new wood feature that is incompatible in size, scale, material, and color.</p>
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*The aforementioned work represents the particularly complex technical or design aspects of rehabilitation projects and should only be considered after the preservation concerns listed above have been addressed.

BUILDING EXTERIOR- ARCHITECTURAL METALS:

Architectural metal features – such as cast-iron facades, porches, and steps; sheet metal cornices, siding, roofs, roof cresting and storefronts; and cast or rolled metal doors, window sash, entablatures, and hardware – are often highly decorative and may be important in defining the overall historic character of the building.

Metals commonly used in historic buildings include lead, tin, zinc, copper, bronze, brass, iron, steel, and to a lesser extent, nickel alloys, stainless steel and aluminum.

Historic metal building components were often created by highly skilled, local artisans, and by the late 19th century, many of these components were prefabricated and readily available from catalogs in standardized sizes and designs.

<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Identifying, retaining, and preserving architectural metal features such as columns, capitals, window hoods, or stairways that are important in defining the overall historic character of the building; and their finishes and colors. Identification is also critical to differentiate between metals prior to work. Each metal has unique properties and thus requires different treatments.</p>	<p>Removing or radically changing architectural metal features which are important in defining the overall character of the building so that, as a result, the character is diminished.</p> <p>Removing a major portion of the historic architectural metal from a façade instead of repairing or replacing only the deteriorated metal, then reconstructing the facade with new material in order to achieve a uniform or “improved” appearance.</p> <p>Radically changing the type of finish or its historic color or accent scheme.</p>
<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Protecting and maintaining architectural metals by providing proper drainage so that water does not stand on flat, horizontal surfaces or accumulate in curved decorative features.</p> <p>Cleaning architectural metals, when necessary, to remove corrosion prior to repainting or applying other appropriate protective coatings.</p> <p>Identifying the particular type of metal prior to any cleaning procedure and then testing to assure that the gentlest cleaning method possible is selected or determining that cleaning is inappropriate for the particular metal.</p>	<p>Failing to identify, evaluate, and treat the causes of corrosion, such as moisture from leaking roofs or gutters.</p> <p>Placing incompatible metals together without providing a reliable separation material. Such incompatibility can result in galvanic corrosion of the noble metal, e.g. copper will corrode cast iron, steel, tin, and aluminum.</p> <p>Exposing metals which were intended to be protected from the environment.</p> <p>Applying paint or other coatings to metals such as copper, bronze, or stainless steel that were meant to be exposed.</p>

<p>Cleaning soft metals such as lead, tin, copper, terneplate, and zinc with appropriate chemical methods because their finishes can be easily abraded by blasting methods.</p> <p>Using the gentlest cleaning methods for cast iron, wrought iron, and steel – hard metals – in order to remove paint, build up and corrosion. If hand scraping and wire brushing have proven ineffective, low pressure dry grit blasting may be used as long as it does not abrade or damage the surface.</p> <p>Applying appropriate paint or other coating systems after cleaning in order to decrease the corrosion rate of metals or alloys.</p> <p>Repainting with colors that are appropriate to the historic building or district.</p> <p>Applying an appropriate protective coating such as lacquer to an architectural metal such as a bronze door which is subject to heavy pedestrian use.</p> <p>Evaluating the overall condition of the architectural metals to determine whether more than protection and maintenance are required, that is, if repairs to the features will be necessary.</p>	<p>Using cleaning methods which alter or damage the historic color, texture, and finish of the metal; or cleaning when it is inappropriate for the metal.</p> <p>Removing the patina of historic metal. The patina may be a protective coating on some metals, such as bronze or copper, as well as a significant historic finish.</p> <p>Cleaning soft metals such as lead, tin, copper, terneplate, and zinc with grit blasting which will abrade the surface of the metal.</p> <p>Failing to employ gentler methods prior to abrasively cleaning cast iron, wrought iron or steel; or using high pressure grit blasting.</p> <p>Failing to re-apply protective coating systems to metals or alloys that require them after cleaning so that accelerated corrosion occurs.</p> <p>Using new colors that are inappropriate to the historic building or district.</p> <p>Failing to assess pedestrian use or new access patterns so that architectural metal features are subject to damage by use or inappropriate maintenance such as salting adjacent sidewalks.</p> <p>Failing to undertake adequate measures to assure the preservation of architectural metal features.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing architectural metal features by patching, splicing, or otherwise reinforcing the metal using recognized preservation methods.</p> <p>Repair may also include the limited replacement in kind – or with compatible substitute material – of those extensively deteriorated or missing parts of features where there are surviving prototypes such as porch balusters, column capitals or bases, or porch cresting.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire architectural metal feature such as a column or a balustrade when repair of the metal and limited replacement of deteriorated or missing parts are appropriate.</p> <p>Using a substitute material for the replacement part that does not convey the visual appearance of the surviving parts of the architectural metal feature or that is physically or chemically incompatible.</p>

<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire architectural metal feature that is too deteriorated to repair – if the overall form and detailing are still evident – using the physical evidence to reproduce the feature.</p> <p>Examples could include cast iron porch steps or steel sash windows.</p> <p>If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing an architectural metal feature that is unrepairable and not replacing it; or replacing it with a new architectural metal feature that does not covey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and installing a new architectural metal feature such a sheet metal cornice or a cast iron capital when the historic feature is completely missing. It may be an accurate restoration using historical, pictorial, and physical documentation; or be a new design that is compatible with the size, scale, material, and color of the historic building. *</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced architectural metal feature is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new architectural metal feature that is incompatible in size, scale, material, and color.</p>

*The aforementioned work represents the particularly complex technical or design aspects of rehabilitation projects and should only be considered after the preservation concerns listed above have been addressed.

BUILDING EXTERIOR- ROOFS:

The roof – with its shape; such as cresting, dormers, cupolas, and chimneys; and the size, color, and patterning of the roofing material- is an important design element of many historic buildings.

In addition, a weather tight roof is essential to the long-term preservation of the entire structure. Historic roofing reflects availability of materials, levels of construction technology, weather, and cost.

For example, throughout the country in all periods of history, wood shingles have been used—their size, shape, and detailing differing according to regional craft practices. European settlers used clay tile for roofing as early as the mid-17th century. In some cities, such as New York and Boston, clay was popularly used as a precaution against fire. The Spanish influence in the use of clay tile is found in the southern, southwestern and western states. In the mid-19th century, tile roofs were often replaced by sheet metal, which is lighter and easier to maintain. Evidence of the use of slate for roofing dates from the mid-17th century. Slate has remained popular for its durability, fireproof qualities, and its decorative applications. The use of metals for roofing and roof features dates from the 18th century, and includes the use of sheet iron, corrugated iron, galvanized metal, tin-plate, copper, lead and zinc. Awareness of these and other traditions of roofing materials and their detailing will contribute to more sensitive treatment.

<u>Recommended</u>	<u>Not Recommended</u>
<p>Identifying, retaining, and preserving roofs- that are important in defining the overall historic character of the building.</p> <p>This includes the roofs’ shape, such as hipped, gambrel, and mansard; decorative features such as cupolas, cresting, chimneys, and weathervanes; and roofing material such as slate, wood, clay tile, and metal, as well as its size, color, and patterning.</p>	<p>Radically changing, damaging, or destroying roofs which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Removing a major portion of the roof or roofing material that is repairable, then reconstructing it with new material in order to create a uniform, or “improved” appearance.</p> <p>Changing the configuration of a roof by adding new features such as dormer windows, vents, or skylights so that the historic character is diminished.</p> <p>Stripping the roof of sound historic material such as slate, clay tile, wood, and architectural metal.</p> <p>Applying paint or other coatings to roofing material which has been historically uncoated.</p>
<p><u>Recommended</u></p> <p>Protecting and maintaining a roof by cleaning the gutters and downspouts and replacing deteriorated flashing.</p> <p>Roof sheathing should also be checked for proper venting to prevent moisture condensation; and to</p>	<p><u>Not Recommended</u></p> <p>Failing to clean and maintain gutters and downspouts properly so that water and debris collect and cause damage to roof fasteners, sheathing, and underlying structure.</p>

<p>ensure that materials are free from insect infestation.</p> <p>Providing adequate anchorage for roofing material to guard against wind damage and moisture penetration.</p> <p>Protecting a leaking roof with plywood and building paper until it can be properly repaired.</p>	<p>Allowing roof fasteners, such as nails and clips to corrode so that roofing material is subject to accelerated deterioration.</p> <p>Permitting a leaking roof to remain unprotected so that accelerated deterioration of historic building materials- masonry, wood, plaster, paint and structural members – occurs.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing a roof by reinforcing the historic materials which comprise roof features.</p> <p>Repairs will also generally include the limited replacement in kind – or with compatible substitute material – of those extensively deteriorated or missing parts of features when there are surviving prototypes such as cupola louvers, dentils, dormer roofing; or slates, tiles, or wood shingles on a main roof.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire roof feature such as a cupola or dormer when repair of the historic materials and limited replacement of deteriorated or missing parts are appropriate.</p> <p>Failing to reuse intact slate or tile when only the roofing substrate needs replacement.</p> <p>Using a substitute material for the replacement part that does not convey the visual appearance of the surviving parts of the roof or that is physically or chemically incompatible.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire feature of the roof that is too deteriorated to repair- if the overall form and detailing are still evident – using the physical evidence as a model to reproduce the feature.</p> <p>Examples can include a large section of roofing, or a dormer or chimney.</p> <p>If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing a feature of the roof that is unrepairable, such as a chimney or dormer, and not replacing it; or replacing it with a new feature that does not convey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and constructing a new feature when the historic feature is completely missing, such as a chimney or cupola. It may be an accurate restoration using historical, pictorial, and physical documentation or be a new design that is compatible with the size, scale, material and color of the historical building.*</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced feature is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new roof feature that is incompatible in size, scale, material, and color.</p>

<u>Recommended</u>	<u>Not Recommended</u>
<p>Installing mechanical and service equipment on the roof such as air conditioning, transformers, or solar collectors when required for the new use so that they are inconspicuous from the public right-of-way and do not damage or obscure character-defining features. *</p>	<p>Installing mechanical or service equipment so that it damages or obscures character-defining features; or is conspicuous from the public right of way.</p>
<p>Designing additions to roofs such as residential, office, or storage spaces; elevator housing; decks and terraces; or dormers or skylights when required by the new use so that they are inconspicuous from the public right-of-way and do not damage or obscure character-defining features. *</p>	<p>Radically changing a character-defining roof shape or damaging or destroying character-defining roofing material as a result of incompatible design or improper installation techniques.</p>

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BUILDING EXTERIOR- WINDOWS:

Technology and prevailing architectural styles have shaped the history of windows in the United States starting in the 17th century with wooden casement windows with tiny glass panes seated in lead cames. From the transitional single-hung sash in the early 1700s to the true double-hung sash later in the same century, these early wooden windows were characterized by the small panes, wide muntins, and the way in which decorative trim was used on both the exterior and interior of the window.

As the sash thickness increased by the turn of the century, muntins took on a thinner appearance as they narrowed in width but increased in thickness according to the size of the window and design practices. Regional traditions continued to have an impact on the prevailing window design such as with the long-term use of "french windows" in areas of the deep South.

Changes in technology led to the possibility of larger glass panes so that by the mid-19th century, two-over-two lights were common; the manufacturing of plate glass in the United States allowed for dramatic use of large sheets of glass in commercial and office buildings by the late 19th century. With mass-produced windows, mail order distribution, and changing architectural styles, it was possible to obtain a wide range of window designs and light patterns in sash.

Popular versions of Arts and Crafts houses constructed in the early 20th century frequently utilized smaller lights in the upper sash set in groups or pairs and saw the re-emergence of casement windows. In the early 20th century, the desire for fireproof building construction in dense urban areas contributed to the growth of a thriving steel window industry along with a market for hollow metal and metal clad wooden windows.

As one of the few parts of a building serving as both an interior and exterior feature, windows are nearly always an important part of the historic character of a building. In most buildings, windows also comprise a considerable amount of the historic fabric of the wall plane and thus are deserving of special consideration in a rehabilitation project.

<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Identifying, retaining, and preserving windows- and their functional and decorative features – that are important in defining the overall historic character of the building.</p> <p>Such features can include frames, sash, muntins, glazing, sills, heads, hoodmolds, paneled or decorated jambs and moldings, and interior and exterior shutters and blinds.</p> <p>Conducting an in-depth survey of the conditions of existing windows early in rehabilitation planning so that repair and upgrading methods and possible replacement options can be fully explored.</p>	<p>Removing or radically changing windows which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Changing the number, location, size or glazing pattern of windows, through cutting new openings, blocking-in windows, and installing replacement sash which does not fit the historic window opening.</p> <p>Changing the historic appearance of windows through the use of inappropriate designs, materials, finishes, or colors which noticeably change the sash, depth of reveal, and muntin configuration; the reflectivity and color of the glazing; or the appearance of the frame.</p>

<p style="text-align: center;"><u>Recommended</u></p> <p>Protecting and maintaining the wood and architectural metal which comprise the window frame, sash, muntins, and surrounds through appropriate surface treatments such as cleaning, rust removal, limited paint removal, and re-application of protective coating systems.</p> <p>Making windows weathertight by re-caulking and replacing or installing weatherstripping. These actions also improve thermal efficiency.</p> <p>Evaluating the overall condition of materials to determine whether more than protection and maintenance are required, i.e. if repairs to windows and window features will be required.</p>	<p>Obscuring historic window trim with metal or other material.</p> <p>Stripping windows of historic material such as wood, iron, cast iron, and bronze.</p> <p>Replacing windows solely because of peeling paint, broken glass, stuck sash, and high air infiltration. These conditions, in themselves, are no indication that windows are beyond repair.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Failing to provide adequate protection of materials on a cyclical basis so that deterioration of the window results.</p> <p>Retrofitting or replacing windows rather than maintaining the sash, frame, and glazing.</p> <p>Failing to undertake adequate measures to assure the preservation of historic windows.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing window frames and sash by patching, splicing, consolidating or otherwise reinforcing.</p> <p>Such repair may also include replacement in kind— or with compatible substitute material-- of those parts that are either extensively deteriorated or missing when there are surviving prototypes such as architraves, hoodmolds, sash, sills and interior or exterior shutters and blinds.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire window when repair of materials and limited replacement of deteriorated or missing parts are appropriate.</p> <p>Failing to reuse serviceable window hardware such as brass sash lifts and sash locks.</p> <p>Using a substitute material for the replacement part that does not convey the visual appearance of the surviving parts of the window or that is physically or chemically incompatible.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire window that is too deteriorated to repair using the same sash and pane</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing a character-defining window that is unrepairable and blocking it in; or replacing it with</p>

<p>configuration and other design details. If using the same kind of material is not technically or economically feasible when replacing windows deteriorated beyond repair, then a compatible substitute material may be considered.</p> <p>For example, on certain types of large buildings, particularly high-rises, aluminum windows may be a suitable replacement for historic wooden sash provided wooden replacement are not practical and the design detail of the historic windows can be matched.</p> <p>Historic color duplication, custom contour panning, incorporation of either an integral muntin or 5/8" deep trapezoidal exterior muntin grids, where applicable, retention of the same glass to frame ratio, matching of the historic reveal, and duplication of the frame width, depth, and such existing decorative details as arched tops should all be components in aluminum replacements for use on historic buildings.</p>	<p>a new window that does not convey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and installing new windows when the historic windows (frame, sash and glazing) are completely missing. The replacement windows may be an accurate restoration using historical, pictorial, and physical documentation; or be a new design that is compatible with the new window openings and the historic character of the building.*</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced window is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new design that is incompatible with the historic character of the building.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and installing additional windows on rear and on other-non character defining elevations if required by the new use. New windows openings may also be cut into exposed party walls. Such design should be compatible with the overall design of the building, but not duplicate the fenestration pattern and detailing of a character-defining elevation.*</p> <p>Providing a setback in the design of dropped ceilings when they are required for the new use to allow for the full height of the window openings.*</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Installing new windows, including frames, sash, and muntin configuration that are incompatible with the building's historic appearance or obscure, damage, or destroy character-defining features.</p> <p>Inserting new floors or furred-down ceilings which cut across the glazed areas of windows so that the exterior form and appearance of the windows are changed.</p>

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BUILDING EXTERIOR- ENTRANCES AND PORCHES:

Entrances and porches are quite often the focus of historic buildings, particularly on primary elevations. Together with their functional and decorative features such as doors, steps, balustrades, pilasters, and entablatures, they can be extremely important in defining the overall historic character of a building.

In many cases, porches were energy-saving devices, shading southern and western elevations. Usually entrances and porches were integral components of a historic building's design; for example, porches on Greek Revival houses, with Doric or Ionic columns and pediments, echoed the architectural elements and features of the larger building.

Central one-bay porches or arcaded porches are evident in Italianate style buildings of the 1860s. Doors of Renaissance Revival style buildings frequently supported entablatures or pediments.

Porches were particularly prominent features of Eastlake and Stick Style houses; porch posts, railings, and balusters were characterized by a massive and robust quality, with members turned on a lathe. Porches of bungalows of the early 20th century were characterized by tapered porch posts, exposed post and beams, and low-pitched roofs with wide overhangs.

Art Deco commercial buildings were entered through stylized glass and stainless-steel doors.

<u>Recommended</u>	<u>Not Recommended</u>
<p>Identifying, retaining, and preserving entrances – and their functional and decorative features – that are important in defining the overall historic character of the building such as doors, fanlights, sidelights, pilasters, entablatures, columns, balustrades, and stairs.</p>	<p>Removing or radically changing entrances or porches which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Stripping entrances and porches of historic material such as wood, iron, cast iron, terra cotta, tile and brick.</p> <p>Removing an entrance or porch because the building has been reoriented to accommodate a new use.</p> <p>Cutting new entrances on a primary elevation.</p> <p>Altering utilitarian or service entrances so they appear to be formal entrances by adding paneled doors, fanlights, and sidelights.</p>
<p><u>Recommended</u></p> <p>Protecting and maintaining the masonry, wood, and architectural metal that comprise entrances and porches through appropriate surface treatments such as cleaning, rust removal, limited paint</p>	<p><u>Not Recommended</u></p> <p>Failing to provide adequate protection to materials on a cyclical basis so that deterioration of entrances and porches results.</p>

<p>removal, and re-application of protective coating systems.</p> <p>Evaluating the overall condition of materials to determine whether more than protection and maintenance are required, that is, repairs to entrance and porch features will be necessary.</p>	<p>Failing to undertake adequate measures to assure the protection of historic entrances and porches.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing entrances and porches by reinforcing the historic materials.</p> <p>Repair will also generally include the limited replacement in kind – or with compatible substitute material – of those extensively deteriorated or missing parts of repeated features where there are surviving prototypes such as balustrades, cornices, entablatures, columns, sidelights, and stairs.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire entrance or porch when the repair of materials and limited replacement of parts are appropriate.</p> <p>Using a substitute material for the replacement parts that does not convey the visual appearance of the surviving parts of the entrance and porch or that is physically or chemically incompatible.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire entrance or porch that is too deteriorated to repair – if the overall form and detailing are still evident – using the physical evidence as a model to reproduce the feature. If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing an entrance or porch that is unrepairable and not replacing it; or replacing it with a new entrance or porch that does not convey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and constructing a new entrance or porch when the historic entrance or porch is completely missing. It may be a restoration based on historical, pictorial, and physical documentation; or be a new design that is compatible with the historic character of the building.*</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced entrance or porch is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new entrance or porch that is incompatible in size, scale, material, and color.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing enclosures for historic porches when required by the new use in a manner that preserves the historic character of the building. This can include using large sheets of glass and recessing the</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Enclosing porches in a manner that results in a diminution or loss of historic character by using solid materials such as wood, stucco, or masonry.</p>

<p>enclosure wall behind existing scrollwork, posts, and balustrades. *</p> <p>Designing and installing additional entrances or porches when required for the new use in a manner that preserves the historic character of the building, i.e., limiting such alteration to non-character-defining elevations. *</p>	<p>Installing secondary service entrances and porches that are incompatible in size and scale with the historic building or obscure, damage, or destroy character-defining features.</p>
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BUILDING EXTERIOR- STOREFRONTS:

The storefront is usually the most prominent feature of a historic commercial building, playing a crucial role in a store's advertising and merchandising strategy. Although a storefront normally does not extend beyond the first story, the rest of the building is often related to it visually through a unity of form and detail. Planning should always consider the entire building; window patterns on the upper floors, cornice elements, and other decorative features should be carefully retained, in addition to the storefront itself.

The earliest extant storefronts in the U.S., dating from the late 18th and early 19th centuries, had bay or oriel windows and provided limited display space. The 19th century witnessed the progressive enlargement of display windows as plate glass became available in increasingly larger units. The use of cast iron columns and lintels at ground floor level permitted structural members to be reduced in size. Recessed entrances provided shelter for sidewalk patrons and further enlarged display areas.

In the 1920s and 1930s, aluminum, colored structural glass, stainless steel, glass block, neon, and other new materials were introduced to create Art Deco storefronts.

<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Identifying, retaining, and preserving storefronts – and their functional and decorative features – that are important in defining the overall historic character of the building such as display windows, signs, doors, transoms, kick plates, corner posts, and entablatures.</p> <p>The removal of inappropriate, non-historic cladding, false mansard roofs, and other later alterations can help reveal the historic character of a storefront.</p>	<p>Removing or radically changing storefronts – and their features – which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Changing the storefront so that it appears residential rather than commercial in character.</p> <p>Removing historic material from the storefront to create a recessed arcade.</p> <p>Introducing coach lanterns, mansard designs, wood shakes, non-operable shutters, and small-paned windows if they cannot be documented historically.</p> <p>Changing the location of a storefront's main entrance.</p>
<p><u><i>Recommended</i></u></p> <p>Protecting and maintaining masonry, wood, and architectural metals which comprise storefronts through appropriate treatments such as cleaning, rust removal, limited paint removal, and reapplication of protective coating systems.</p> <p>Protecting storefronts against arson and vandalism before work begins by boarding up windows and installing alarm systems that are keyed into local protection agencies.</p>	<p><u><i>Not Recommended</i></u></p> <p>Failing to provide adequate protection to materials on a cyclical basis so that deterioration of storefront features result.</p> <p>Permitting entry into the building through unsecured or broken windows and doors so that interior features and finishes are damaged through exposure to weather or through vandalism.</p>

<p>Evaluating the overall condition of storefront materials to determine whether more than protection and maintenance are required, that is, if repairs to features will be necessary.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Repairing storefronts by reinforcing the historic materials.</p> <p>Repairs will also generally include the limited replacement in kind—or with compatible substitute materials— of those extensively deteriorated or missing parts of storefronts where there are surviving prototypes such as transoms, kick plates, pilasters, or signs.</p>	<p>Stripping storefronts of historic material such as wood, cast iron, terra cotta, carrara glass, and brick.</p> <p>Failing to undertake adequate measures to assure the preservation of the historic storefront.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire storefront when repair of materials and limited replacement of its parts are appropriate.</p> <p>Using substitute material for the replacement parts that does not convey the same visual appearance as the surviving parts of the storefront that is physically or chemically incompatible.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire storefront that is too deteriorated to repair – if the overall form and detailing are still evident – using the physical evidence as a model. If using the same material is not technically or economically feasible, then compatible substitute materials may be considered.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Designing and constructing a new storefront when the historic storefront is completely missing. It may be an accurate restoration based on historical, pictorial, and physical documentation; or be a new design that is compatible with the size, scale, material, and color of the historic building. *</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing a storefront that is unrepairable and not replacing it; or replacing it with a new storefront that does not convey the same visual appearance.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced storefront is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new design that is incompatible in size, scale, material, and color.</p> <p>Using inappropriately scaled signs and logos or other types of signs that obscure, damage, or destroy remaining character-defining features of the historic building.</p>

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BUILDING INTERIOR- STRUCTURAL SYSTEM:

If features of the structural system are exposed such as load bearing brick walls, cast iron columns, roof trusses, post and beams, vigas, or stone foundation walls, they may be important in defining the building's overall historic character. [Unexposed structural features that are not character-defining](#) or an entire structural system may nonetheless be significant in the history of building technology.

Therefore, the structural system should always be examined and evaluated early in the project planning stage to determine both its physical condition and its importance to the building's historic character or historical significance.

The types of structural systems found in America include, but certainly are not limited to the following: wooden frame construction (17th c.), balloon frame construction (19th c.), load-bearing masonry construction (18th c.), brick cavity wall construction (19th c.), heavy timber post and beam industrial construction (19th c.), fireproof iron construction (19th c.), heavy masonry and steel construction (19th c.), skeletal steel construction (19th c.), and concrete slab and post construction (20th c.).

<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Identifying, retaining, and preserving structural systems-- and individual features of systems-- that are important in defining the overall historic character of the building, such as post and beam systems, trusses, summer beams, vigas, cast iron columns, above grade stone foundation walls, or loadbearing brick or stone walls.</p>	<p>Removing, covering, or radically changing features of structural systems which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Putting a new use into the building which could overload the existing structural system; or installing equipment or mechanical systems which could damage the structure.</p> <p>Demolishing a loadbearing masonry wall that could be augmented and retained and replacing it with a new wall (i.e. brick or stone), using the historic masonry only as an exterior veneer.</p> <p>Leaving known structural problems untreated such as deflection of beams, cracking and bowing of walls, or racking of structural members.</p> <p>Utilizing treatments or products that accelerate the deterioration of structural material such as introducing urea-formaldehyde foam insulation into frame walls.</p>
<p><u><i>Recommended</i></u></p> <p>Protecting and maintaining the structural system by cleaning the roof gutters and downspouts; replacing roof flashing; keeping masonry, wood, and architectural metals in a sound condition, and</p>	<p><u><i>Not Recommended</i></u></p> <p>Failing to provide proper building maintenance so that deterioration of the structural system results. Causes of deterioration includes subsurface ground movement, vegetation growing too close to</p>

<p>ensuring that structural members are free from insect infestation.</p> <p>Examining and evaluating the physical condition of the structural system and its individual features using non-destructive techniques such as x-ray photography.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Repairing the structural systems by augmenting or upgrading individual parts or features. For example, weakened structural members such as floor framing can be paired with a new member, braced, or otherwise supplemented and reinforced.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind-or with substitute material-those portions or features of the structural system that are either extensively deteriorated or are missing when there are surviving prototypes such as cast-iron columns, roof rafters or trusses, or sections of loadbearing walls.</p> <p>Substitute material should convey the same form, design, and overall visual appearance as the historic features; and, at a minimum, be equal to its loadbearing capabilities.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Limiting any new excavations adjacent to historic foundations to avoid undermining the structural stability of the building or adjacent historic buildings. Studies should be done to ascertain potential damage to archeological resources. *</p> <p>Correcting structural deficiencies in preparation for the new use in a manner that preserves the structural system and individual character-defining features. *</p>	<p>foundation walls, improper grading, fungal rot, and poor interior ventilation that results in condensation.</p> <p>Utilizing destructive probing techniques that will damage or destroy structural material.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Upgrading the building structurally in a manner that diminishes the historic character of the exterior, such as installing strapping channels or removing a decorative cornice; or damages interior features or spaces.</p> <p>Replacing a structural member or other feature of the structural system when it could be augmented and retained.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Installing a visible replacement feature that does not convey the same visual appearance, e.g., replacing an exposed wood summer beam with a steel beam.</p> <p>Using substitute material that does not equal the loadbearing capabilities of the historic material and design or is otherwise physically or chemically incompatible.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Carrying out excavations or regrading adjacent to or within a historic building which could cause the historic foundation to settle, shift, or fail; could have a similar effect on adjacent historic buildings; or could destroy significant archeological resources.</p> <p>Radically changing interior spaces or damaging or destroying features or finishes that are character defining while trying to correct structural deficiencies in preparation for the new use.</p>
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<p>Designing and installing new mechanical or electrical systems when required for the new use which minimize the number of cutouts or holes in structural members. *</p> <p>Adding a new floor when required for the new use if such an alteration does not damage or destroy the structural system or obscure, damage, or destroy character-defining spaces, features, or finishes. *</p> <p>Creating an atrium or a light well to provide natural light when required for the new use in a manner that assures the preservation of the structural system as well as character-defining interior spaces, features, and finishes. *</p>	<p>Installing new mechanical and electrical systems or equipment in a manner which results in numerous cuts, splices, or alterations to the structural members.</p> <p>Inserting a new floor when such a radical change damages a structural system or obscures or destroys interior spaces, features, or finishes.</p> <p>Inserting new floors or furred-down ceilings which cut across the glazed areas of windows so that the exterior form and appearance of the windows are radically changed.</p> <p>Damaging the structural system or individual features; or radically changing, damaging, or destroying character-defining interior spaces, features, or finishes in order to create an atrium or a light well.</p>
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BUILDING INTERIOR- SPACES, FEATURES, AND FINISHES:

An interior floor plan, the arrangement of spaces, and built in features and applied finishes are individually or collectively important in defining the historic character of the building.

Their identification, retention, protection, and repair should be given prime consideration in every rehabilitation project. In evaluating historic interiors prior to rehabilitation, it should be kept in mind that interiors are comprised of a series of primary and secondary spaces. This is applicable to all buildings, from courthouses to cathedrals, to cottages and office buildings. Primary spaces, including entrance halls, parlors, or living rooms, assembly rooms and lobbies, are defined not only by their features and finishes, but by the size and proportion of the rooms themselves—purposely created to be the visual attraction or functioning “core” of the building. Care should be taken to retain the essential proportions of primary interior spaces and not to damage, obscure, or destroy distinctive features and finishes.

Secondary spaces include areas and rooms that “service” the primary spaces and may include kitchens, bathrooms, mail rooms, utility spaces, secondary hallways, fire stairs and office cubicles in a commercial or office space. Extensive changes can often be made in these less important areas without having a detrimental effect on the overall historic character.

<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Identifying, retaining, and preserving a floor plan or interior spaces that are important in defining the overall historic character of the building.</p> <p>This includes the size, configuration, proportion, and relationship of rooms and corridors; the relationship of features to spaces; and the spaces themselves such as lobbies, reception halls, entrance halls, double parlors, theaters, auditoriums, and important industrial or commercial use spaces.</p>	<p>Radically changing a floor plan or interior spaces-including individual rooms-which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Altering the floor plan by demolishing principal walls and partitions to create a new appearance.</p> <p>Altering or destroying interior spaces by inserting floors, cutting through floors, lowering ceilings, or adding or removing walls.</p> <p>Relocating an interior feature such as a staircase so that the historic relationship between features and space is altered.</p>
<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Identifying, retaining, and preserving interior features and finishes that are important in defining the overall historic character of the building.</p> <p>This includes columns, cornices, baseboards, fireplaces and mantles, paneling, light fixtures, hardware, and flooring; and wallpaper, plaster, paint, and finishes such as stenciling, marbling, and graining; and other decorative materials that accent</p>	<p>Removing or radically changing features and finishes which are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p>Installing new decorative material that obscures or damages character-defining interior features or finishes.</p>

<p>interior features and provide color, texture, and patterning to walls, floors, and ceilings.</p>	<p>Removing paint, plaster, or other finishes from historically finished surfaces to create a new appearance (e.g. removing plaster to expose masonry surfaces such as brick walls or a chimney piece).</p>
	<p>Applying paint, plaster, or other finishes to surfaces that have been historically unfinished to create a new appearance.</p>
	<p>Stripping paint to bare wood rather than repairing or reapplying grained or marbled finishes to features such as doors and paneling.</p>
	<p>Radically changing the type of finish or its color, such as painting a previously varnished wood feature.</p>
<p style="text-align: center;"><u>Recommended</u></p>	<p style="text-align: center;"><u>Not Recommended</u></p>
<p>Protecting and maintaining masonry, wood, and architectural metals which comprise interior features through appropriate surface treatments such as cleaning, rust removal, limited paint removal, and reapplication of protective coating systems.</p>	<p>Failing to provide adequate protection to materials on a cyclical basis so that deterioration of interior features results.</p>
<p>Protecting interior features and finishes against arson and vandalism before project work begins, erecting protective fencing, boarding-up windows, and installing fire alarm systems that are keyed to local protection agencies.</p>	<p>Permitting entry into historic buildings through unsecured or broken windows and doors so that interior features and finishes are damaged by exposure to weather or through vandalism.</p>
<p>Protecting interior features such as a staircase, mantel, or decorative finishes and wall coverings against damage during project work by covering them with heavy canvas or plastic sheets.</p>	<p>Stripping interiors of features such as woodwork, doors, windows, light fixtures, copper piping, radiators; or of decorative materials.</p>
<p>Installing protective coverings in areas of heavy pedestrian traffic to protect historic features such as wall coverings, parquet flooring and paneling.</p>	<p>Failing to provide proper protection of interior features and finishes during work so that they are gouged, scratched, dented, or otherwise damaged.</p>
<p>Removing damaged or deteriorated paints and finishes to the next sound layer using the gentlest method possible, then repainting or refinishing using compatible paint or other coating systems.</p>	<p>Failing to take new use patterns into consideration so that interior features and finishes are damaged.</p>
<p>Repainting with colors that are appropriate to the historic building.</p>	<p>Using destructive methods such as propane or butane torches or sandblasting to remove paint or other coatings. These methods can irreversibly damage the historic materials that comprise interior features.</p>
	<p>Using new paint colors that are inappropriate to the historic building.</p>

<p>Limiting abrasive cleaning methods to certain industrial warehouse buildings where the interior masonry or plaster features do not have distinguishing design, detail, tooling, or finishes; and where wood features are not finished, molded, beaded, or worked by hand. Abrasive cleaning should only be considered after other, gentler methods have been proven ineffective.</p> <p>Evaluating the overall condition of materials to determine whether more than protection and maintenance are required, that is, if repairs to interior features and finishes will be necessary.</p>	<p>Changing the texture and patina of character-defining features through sandblasting or using other abrasive methods to remove paint, discoloration or plaster. This includes both exposed wood (including structural members) and masonry.</p> <p>Failing to undertake adequate measures to assure the preservation of interior features and finishes.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing interior features and finishes by reinforcing the historic materials.</p> <p>Repair will also generally include the limited replacement in kind – or with compatible substitute material – of those extensively deteriorated or missing parts of repeated features when there are surviving prototypes such as stairs, balustrades, wood paneling, columns; or decorative wall coverings or ornamental tin or plaster ceilings.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire interior feature such as a staircase, paneled wall, parquet floor, or cornice; or finish such as a decorative wall covering or ceiling when repair of materials and limited replacement of such parts are appropriate.</p> <p>Using a substitute material for the replacement part that does not convey the visual appearance of the surviving parts or portions of the interior feature or finish or that is physically or chemically incompatible.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire interior feature or finish that is too deteriorated to repair – if the overall form and detailing are still evident – using the physical evidence as a model for reproduction. Examples could include wainscoting, a tin ceiling, or interior stairs. If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing a character defining feature or finish that is unrepairable and not replacing it; or replacing it with a new feature or finish that does not convey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and installing a new interior feature or finish if the historic feature or finish is completely missing. *</p> <p>This could include missing partitions, stairs, elevators, lighting fixtures, and wall coverings; or even entire rooms if all historic spaces, features,</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced feature is based on insufficient physical, historical, and pictorial documentation or on information derived from another building.</p> <p>Introducing a new interior feature or finish that is incompatible with the scale, design, materials,</p>

<p>and finishes are missing or have been destroyed by inappropriate “renovations.” The design may be a restoration based on historical, pictorial, and physical documentation; or be a new design that is compatible with the historic character of the building, district, or neighborhood. *</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Accommodating service functions such as bathrooms, mechanical equipment, and office machines required by the building’s new use in secondary spaces such as first floor service areas or on upper floors. *</p> <p>Reusing decorative materials or features that have had to be removed during the rehabilitation work including wall and baseboard trim, door molding, paneled doors, and simple wainscoting; and relocating such material or features in areas appropriate to their historic placement. *</p> <p>Installing permanent partitions in secondary spaces; removable partitions that do not destroy the sense of space should be installed when the new use requires the subdivision of character defining interior spaces. *</p> <p>Enclosing an interior stairway where required by code so that its character is retained. In many cases, glazed fire-rated walls may be used. *</p> <p>Placing new code-required stairways or elevators in secondary and service areas of the historic building. *</p> <p>Creating an atrium or a light well to provide natural light when required for the new use in a manner that preserves character-defining interior spaces, features, and finishes as well as the structural systems. *</p> <p>Adding a new floor if required for the new use in a manner that preserves character-defining structural features, and interior spaces, features, and finishes. *</p>	<p>color, and texture of the surviving interior features and finishes.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Dividing rooms, lowering ceilings, and damaging or obscuring character-defining features such as fireplaces, niches, stairways or alcoves, so that a new use can be accommodated in the building.</p> <p>Discarding historic material when it can be reused within the rehabilitation project or relocating it in historically inappropriate areas.</p> <p>Installing permanent partitions that damage or obscure character-defining spaces, features, or finishes.</p> <p>Enclosing an interior stairway with fire-rated construction so that the stairwell space or any character-defining features are destroyed.</p> <p>Radically changing, damaging, or destroying character-defining spaces, features, or finishes when adding new code-required stairways and elevators.</p> <p>Destroying character-defining interior spaces, features, or finishes; or damaging the structural system in order to create an atrium or light well.</p> <p>Inserting a floor within a building that alters or destroys the fenestration; radically changes a character-defining interior space; or obscures, damages, or destroys decorative detailing.</p>
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*The aforementioned work represents the particularly complex technical or design aspects of rehabilitation projects and should only be considered after the preservation concerns listed above have been addressed.

BUILDING INTERIOR- MECHANICAL SYSTEMS:

Mechanical, lighting and plumbing systems improved significantly with the coming of the Industrial Revolution.

The 19th century interest in hygiene, personal comfort, and the reduction of the spread of disease were met with the development of central heating, piped water, piped gas, and network of underground cast iron sewers. Vitreous tiles in kitchens, baths and hospitals could be cleaned easily and regularly. The mass production of cast iron radiators made central heating affordable to many; some radiators were elaborate and included special warming chambers for plates or linens. Ornamental grilles and registers provided decorative covers for functional heaters in public spaces. By the turn of the 20th century, it was common to have all these modern amenities as an integral part of the building.

The greatest impact of the 20th century on mechanical systems was the use of electricity for interior lighting, forced air ventilation, elevators for tall buildings, and electric heat. The new age of technology brought an increasingly high level of design and decorative art to the functional elements of mechanical, electrical and plumbing systems.

The visible decorative features of historic mechanical systems such as grilles, lighting fixtures, and ornamental switch plates may contribute to the overall historic character of the building and should thus be retained and repaired, whenever possible. Their identification needs to take place together with an evaluation of their physical condition early in project planning. On the other hand, the functioning parts of many older systems, such as compressors and their ductwork, and wiring and pipes may often need to be upgraded or entirely replaced in order to accommodate the new use and to meet code requirements.

<p style="text-align: center;"><u>Recommended</u></p> <p>Identifying, retaining, and preserving visible features of early mechanical systems that are important in defining the overall historic character of the building.</p> <p><i>This may include radiators, vents, fans, grilles, plumbing fixtures, switchplates, and lights.</i></p> <p style="text-align: center;"><u>Recommended</u></p> <p>Protecting and maintaining mechanical, plumbing, and electrical systems and their features through cyclical cleaning and other appropriate measures.</p> <p>Preventing accelerated deterioration of mechanical systems by providing adequate ventilation of attics, crawlspaces, and cellars so that moisture problems are avoided.</p> <p><i>Improving the energy efficiency of existing mechanical systems to help reduce the need for elaborate new equipment. Consideration should be</i></p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing or radically changing features of mechanical systems that are important in defining the overall historic character of the building so that, as a result, the character is diminished.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Failing to provide adequate protection of materials on a cyclical basis so that deterioration of mechanical systems and their visible features results.</p> <p>Enclosing mechanical systems in areas that are not adequately ventilated so that deterioration of the systems results.</p> <p><i>Installing unnecessary air conditioning or climate control systems which can add excessive moisture to the building. This additional moisture can either condense inside, damaging interior surfaces, or</i></p>
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<p>given to installing storm windows, insulating attic crawl space, or adding awnings, if appropriate.</p>	<p>pass through interior walls to the exterior, potentially damaging adjacent materials as it migrates.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing mechanical systems by augmenting or upgrading system parts, such as installing new pipes and ducts; rewiring; or adding new compressors or boilers.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing a mechanical system or its functional parts when it could be upgraded and retained.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind – or with compatible substitute material – those visible features of mechanical systems that are either extensively deteriorated or are missing when there are surviving prototypes such as ceiling fans, switchplates, radiators, grilles, or plumbing fixtures.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Installing a replacement feature that does not convey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Installing a completely new mechanical system if required for the new use so that it causes the least alteration possible to the building’s floor plan, the exterior elevations, and the least damage to historic building material. *</p> <p>Providing adequate structural support for new mechanical equipment. *</p> <p>Installing the vertical runs of ducts, pipes, and cables in closets, service rooms, and wall cavities. *</p> <p>Installing air conditioning units if required by the new use in such a manner that the historic features are not damaged or obscured and excessive moisture is not generated that will accelerate deterioration of historic materials. *</p> <p>Installing heating/air conditioning units in the window frames in such a manner that the sash and frames are protected. Window installations should be considered only when all other heating/cooling systems would result in significant damage to historic materials. *</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Installing a new mechanical system so that character-defining structural or interior features are radically changed, damaged, or destroyed.</p> <p>Failing to consider the weight and design of new mechanical equipment so that, as a result, historic structural members or finished surfaces are weakened or cracked.</p> <p>Installing vertical runs of ducts, pipes, and cables in places where they will obscure character – defining features.</p> <p>Concealing mechanical equipment in walls or ceilings in a manner that requires the removal of historic building material.</p> <p>Installing “dropped” acoustical ceilings to hide mechanical equipment when this destroys the proportions of character –defining interior spaces.</p> <p>Cutting through features such as masonry wall in order to install air conditioning units.</p>

	Radically changing the appearance of the historic building or damaging or destroying windows by installing heating/air conditioning units in historic window frames.
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BUILDING SITE

The landscape surrounding a historic building and contained within an individual parcel of land is considered the building site. The site, including its associated features, contributes to the overall character of the historic property.

As a result, the relationship between the buildings and landscape features within the site's boundaries should be considered in the overall planning for rehabilitation project work.

Landscapes which contain historic buildings are found in rural, suburban, and urban communities and reflect environmental influences such as climate as well as the historic period in which they were created.

Landscapes created for functional purposes as well as aesthetic enjoyment have been a part of American history since European settlement. Historic American styles in landscape design developed from 17th-18th century Spanish and Colonial gardens, evolving into the pastoral and picturesque design of the 19th century. Victorian carpet bedding, popular during the late 19th century, produced profuse plantings of annuals and perennials. Later, the early 20th century yielded a return to classical traditions, with revival gardens reflecting European renaissance design.

The building site may be significant in its own right, or derive its significance simply from its association with the historic structure. The level of significance, association, integrity, and condition of the building site may influence the degree to which the existing landscape features should be retained during the rehabilitation project. In an industrial property, the site may be defined simply as the relationship between buildings or between the ground plane and open space and its associated buildings. Designed historic landscapes significant in the field of landscape architecture require a more detailed analysis of their character-defining features which may include lawns, hedges, walks, drives, fences, walls, terraces, water features, topography (grading) and furnishings.

Vegetation is an important feature in landscapes; this material, including both native species and cultivated plants creates an appearance that is constantly changing, both seasonally and annually. Since most plant material is adapted to specific environments, the character of landscapes varies dramatically in different climates, elevations and regions.

<u>Recommended</u>	<u>Not Recommended</u>
<p>Identifying, retaining, and preserving buildings and their features as well as features of the site that are important in defining its overall historic character.</p> <p>Site features can include circulation systems such as walks, paths, roads or parking; vegetation such as trees, shrubs, fields, or herbaceous plant material; landforms such as terracing, berms, or grading; and furnishings such as lights, fences, or benches; decorative elements such as sculpture, statuary or monuments; water features including fountains, streams, pools, or lakes; and subsurface archeological features which are important in defining the history or the site.</p>	<p>Removing or radically changing buildings and their features or site features which are important in defining the overall historic character of the building site so that, as a result, the character is diminished.</p> <p>Removing or relocating historic buildings or landscape features, thus destroying the historic relationship between buildings and the landscape.</p> <p>Removing or relocating historic buildings on a site or in a complex of related historic structures – such as a mill complex or farm – thus diminishing the historic character of the site or complex.</p>

<p>Retaining the historic relationship between buildings and the landscape.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Protecting and maintaining the buildings and building site by providing proper drainage to assure that water does not erode foundation walls; drain toward the building; nor erode the historic landscape.</p> <p>Minimizing disturbance of terrain around buildings or elsewhere on the site, thus reducing the possibility of destroying or damaging important landscape features or archeological materials.</p> <p>Surveying and documenting areas where the terrain will be altered to determine the potential impact to important landscape features or archeological resources.</p> <p>Protecting, e.g. preserving in place important archeological resources.</p> <p>Planning and carrying out any necessary investigation using professional archeologists and modern archeological methods when preservation in place is not feasible.</p> <p>Preserving important landscape features, including ongoing maintenance of historic plant material.</p> <p>Protecting the building and landscape features against arson and vandalism before rehabilitation work begins, i.e., erecting protective fencing and installing alarm systems that are keyed into local protection agencies.</p> <p>Providing continued protection of masonry, wood, and architectural metals which comprise the building and site features through appropriate cleaning, rust removal, limited paint removal, and re-application of protective coating systems.</p>	<p>Moving buildings onto the site, thus creating a false historical appearance.</p> <p>Radically changing the grade on the property, or adjacent to a building. For example, changing the grade adjacent to a building to permit development of a formerly below-grade area that would drastically change the historic relationship of the building to its site.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Failing to maintain adequate site drainage so that buildings and site features are damaged or destroyed; or, alternatively, changing the site grading so that water no longer drains properly.</p> <p>Introducing heavy machinery into areas where they may disturb or damage important landscape features or archeological resources.</p> <p>Failing to survey the building site prior to the beginning of rehabilitation work which results in damage to, or destruction of, important landscape features or archeological resources.</p> <p>Leaving known archeological material unprotected so that it is damaged during rehabilitation work.</p> <p>Permitting unqualified personnel to perform data recovery on archeological resources so that improper methodology results in the loss of important archeological material.</p> <p>Allowing important landscape features to be lost or damaged due to a lack of maintenance.</p> <p>Permitting the property to remain unprotected so that the building and landscape features or archeological resources are damaged or destroyed.</p> <p>Removing or destroying features from the buildings or site such as wood siding, iron fencing, masonry balustrades; or plant material.</p> <p>Failing to provide adequate protection of materials on a cyclical basis so that deterioration of building and site features results.</p>
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<p>Evaluating the overall condition of materials and features of the property to determine whether more than protection and maintenance are required, that is, if repairs to building and site features will be necessary.</p> <p style="text-align: center;"><u>Recommended</u></p> <p>Repairing features of the building and site by reinforcing the historic materials.</p>	<p>Failing to undertake adequate measures to assure the protection of building and site features.</p> <p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire feature of the building or site such as a fence, walkway, or driveway when repair of materials and limited compatible replacement of deteriorated or missing parts are appropriate.</p> <p>Using a substitute material for the replacement part that does not convey the visual appearance of the surviving parts of the building or site feature or that is physically or chemically incompatible.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire feature of the building or site that is too deteriorated to repair if the overall form and detailing are still evident. Physical evidence from the deteriorated feature should be used as a model to guide the new work. This could include an entrance or porch, walkway, or fountain. If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p> <p>Replacing deteriorated or damaged landscape features in kind.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing a feature of the building or site that is unrepairable and not replacing it; or replacing it with a new feature that does not convey the same visual appearance.</p> <p>Adding conjectural landscape features to the site such as period reproduction lamps, fences, fountains, or vegetation that is historically inappropriate, thus creating a false sense of historic development.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and constructing a new feature of a building or site when the historic feature is completely missing, such as an outbuilding, terrace, or driveway. It may be based on historical, pictorial, and physical documentation; or be a new design that is compatible with the historic character of the building and site. *</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced feature is based on insufficient historical, pictorial, and physical documentation.</p> <p>Introducing a new building or site feature that is out of scale or otherwise inappropriate design.</p> <p>Introducing a new landscape feature, including plant material that is visually incompatible with the site, or that alters or destroys the historic site patterns or vistas.</p>

<u><i>Recommended</i></u>	<u><i>Not Recommended</i></u>
<p>Designing new on-site parking, loading docks, or ramps when required by the new use so that they are as unobtrusive as possible and assure the preservation of historic relationship between the building or buildings and landscape. *</p> <p>Designing new exterior additions to historic buildings or adjacent new construction which is compatible with the historic character of the site and which preserve the historic relationship between the building or buildings and the landscape. *</p> <p>Removing nonsignificant buildings, additions, or site features which detract from the historic character of the site. *</p>	<p>Locating any new construction on the building site where important landscape features will be damaged or destroyed, for example, removing a lawn and walkway and installing a parking lot.</p> <p>Placing parking facilities directly adjacent to historic buildings where automobiles may cause damage to the buildings or to important landscape features.</p> <p>Introducing new construction onto the building site which is visually incompatible in terms of size, scale, design, materials, color and texture; which destroys historic relationships on the site; or which damages or destroys important landscape features.</p> <p>Removing a building in a complex of buildings; or removing a building feature, or a landscape feature which is important in defining the historic character of the site.</p>

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DISTRICT OR NEIGHBORHOOD SETTING:

The setting is the area or environment in which a historic property is found. It may be an urban or suburban neighborhood or a natural landscape in which a building has been constructed.

The elements of setting, such as the relationship of buildings to each other, setbacks, fence patterns, views, driveways and walkways, and street trees together create the character of a district or neighborhood. In some instances, many individual building sites may form a neighborhood or setting.

In rural environments, agricultural or natural landscapes may form the setting for an individual property.

Commented [KG2]: They tweaked the wording on a lot of these recommendations changing from district or neighborhood to setting. Became hard to say what words were added/removed so just highlighted whole recommendation if not clear

<u>Recommended</u>	<u>Not Recommended</u>
<p>Identifying, retaining, and preserving building and landscape features which are important in defining the historic character of the setting.</p> <p>Such features can include roads and streets, furnishing such as lights or benches, vegetation, gardens and yards, adjacent open space such as fields, parks, commons or woodlands, and important views or visual relationships.</p> <p>Retaining the historic relationship between buildings and landscape features of the setting. For example, preserving the relationship between a town common and its adjacent historic houses, municipal buildings, historic roads, and landscape features.</p>	<p>Removing or radically changing those features of the setting which are important in defining the historic character.</p> <p>Destroying the relationship between the buildings and landscape features within the setting by widening existing streets, changing landscape materials or constructing inappropriately located new street or parking.</p> <p>Removing or relocating historic buildings or landscape features, thus destroying their historic relationship within the setting.</p>
<u>Recommended</u>	<u>Not Recommended</u>
<p>Protecting and maintaining historic masonry, wood, architectural metals, stone and plant features through appropriate treatments such as cleaning, rust removal, limited paint removal, and reapplication of protective coating systems; and pruning and vegetation management.</p> <p>Protecting building and landscape features such as lighting or trees, against arson and vandalism before rehabilitation work begins by erecting protective fencing and installing alarm systems that are keyed into local protection agencies.</p> <p>Evaluating the overall condition of the building and landscape features to determine whether more than protection and maintenance are required, that is, if repairs to features will be necessary.</p>	<p>Failing to provide adequate protection of materials on a cyclical basis which results in the deterioration of building and landscape features.</p> <p>Permitting the building and setting to remain unprotected so that exterior or interior features are damaged.</p> <p>Stripping or removing features from buildings or the setting such as wood siding, iron fencing, terra cotta balusters or plant material.</p> <p>Failing to undertake adequate measures to assure the protection of building and landscape features.</p>

<p style="text-align: center;"><u>Recommended</u></p> <p>Repairing features of the building and landscape by reinforcing the historic materials.</p> <p>Repair will also generally include the replacement in kind – or with a compatible substitute material – of those extensively deteriorated or missing parts of features when there are surviving prototypes such as porch balustrades, or paving materials.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Replacing an entire feature of the building or landscape when repair of materials and limited replacement of deteriorated or missing parts are appropriate.</p> <p>Using a substitute material for the replacement part that does not convey the visual appearance of the surviving parts of the building or landscape, or that is physically, chemically, or ecologically incompatible.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Replacing in kind an entire feature of the building or landscape that is too deteriorated to repair – when the overall form and detailing are still evident – using the physical evidence as a model to guide the new work.</p> <p>If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered.</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Removing a feature of the building or landscape that is unrepairable and not replacing it; or replacing it with a new feature that does not convey the same visual appearance.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing and constructing a new feature of the building or landscape when the historic feature is completely missing, such as row house steps, a porch, streetlight, or terrace. It may be a restoration based on documentary or physical evidence; or be a new design that is compatible with the historic character of the setting. *</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Creating a false historical appearance because the replaced feature is based on insufficient documentary or physical evidence.</p> <p>Introducing a new building or landscape feature that is out of scale or otherwise inappropriate to the setting’s historic character, e.g. replacing picket fencing with chain link fencing.</p>
<p style="text-align: center;"><u>Recommended</u></p> <p>Designing required new parking so that it is as unobtrusive as possible, thus minimizing the effect on the historic character of the setting. “Shared” parking should also be planned so that several businesses can utilize one parking area as opposed to introducing random, multiple lots. *</p> <p>Designing and constructing new additions to historic buildings when required by the new use. New work should be compatible with the historic</p>	<p style="text-align: center;"><u>Not Recommended</u></p> <p>Placing parking facilities directly adjacent to historic buildings which cause damage to historic landscape features, including removal of plant material, relocation of paths and walkways, or blocking of alleys.</p> <p>Introducing new construction into historic districts that is visually incompatible or that destroys historic relationships within the setting.</p>

<p>character of the setting in terms of size, scale, design, material, color and texture. *</p> <p>Removing nonsignificant buildings, additions, or landscape features which detract from the historic character of the setting. *</p>	<p>Removing a historic building, building feature, or landscape feature that is important in defining the historic character of the setting.</p>
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*The aforementioned work represents the particularly complex technical or design aspects of rehabilitation projects and should only be considered after the preservation concerns listed above have been addressed.

ENERGY EFFICIENCY:

Some features of a historic building or site such as cupolas, shutters, transoms, skylights, sun rooms, porches, and plantings also play a secondary energy conserving role.

Therefore, prior to retrofitting historic buildings to make them more energy efficient, the first step should always be to identify and evaluate the existing historic features to assess their inherent energy-conserving potential. If it is determined that retrofitting measures are necessary, then such work needs to be carried out with particular care to ensure that the building's historic character is retained.

Note: Although the work in this section is quite often an important aspect of rehabilitation projects, it is usually not part of the overall process of preserving character-defining features (identify, protect, repair, replace); rather, such work is assessed for its potential negative impact on the building's historic character. For this reason, particular care must be taken not to obscure, radically change, damage, or destroy character-defining features in the process of rehabilitation work to make the building more energy efficient.

<u>Recommended</u>	<u>Not Recommended</u>
<p>Masonry/Wood/Architectural Metals</p> <p>Installing thermal insulation in attics and in unheated cellars and crawlspaces to increase the efficiency of the existing mechanical systems.</p> <p>Installing insulating material on the inside of masonry walls to increase energy efficiency where there is no character-defining interior molding around the window or other interior architectural detailing.</p>	<p>Masonry/Wood/Architectural Metals</p> <p>Applying thermal insulation with a high moisture content into wall cavities which may damage historic fabric.</p> <p>Installing wall insulation without considering its effect on interior molding or other architectural detailing.</p>
<p>Windows</p> <p>Utilizing the inherent energy conserving features of a building by maintaining windows and louvered blinds in good operable condition for natural ventilation.</p> <p>Improving thermal efficiency with weather-stripping, storm windows, caulking, interior shades, and, if historically appropriate, blinds and awnings.</p> <p>Installing interior storm windows with air-tight gaskets, ventilating holes, and/or removable clips to ensure proper maintenance and to avoid condensation damage to historic windows.</p> <p>Installing exterior storm windows which do not damage or obscure the windows and frames.</p>	<p>Removing historic shading devices rather than keeping them in an operable condition.</p> <p>Replacing historic multi-paned sash with new thermal sash utilizing false muntins.</p> <p>Installing interior storm windows that allow moisture to accumulate and damage the window.</p> <p>Installing new exterior storm windows which are inappropriate in size or color.</p> <p>Replacing windows or transoms with fixed thermal glazing or permitting windows and transoms to remain inoperable rather than utilizing them for their energy conserving potential.</p>

<p>Entrances and Porches</p> <p>Maintaining porches and double vestibule entrances so that they can retain heat or block the sun and provide natural ventilation.</p> <p>Interior Features</p> <p>Retaining historic interior shutters and transoms for their inherent energy-conserving features.</p> <p>Mechanical Systems</p> <p>Improving energy efficiency of existing mechanical systems by installing insulation in attics and basements.</p> <p>Building Site</p> <p>Retaining plant materials, trees, and landscape features, especially those which perform passive solar energy functions, such as sun shading and wind breaks.</p> <p>Setting (District or Neighborhood)</p> <p>Maintaining those existing landscape features which moderate the effects of the climate on the setting such as deciduous trees, evergreen wind-blocks, and lakes or ponds.</p> <p>New Additions to Historic Buildings</p> <p>Placing a new addition that may be necessary to increase energy efficiency on non-character-defining elevations.</p>	<p>Changing the historic appearance of the building by enclosing porches</p> <p>Removing historic interior features which play a secondary energy conserving role.</p> <p>Replacing existing mechanical systems that could be repaired for continued use.</p> <p>Removing plant materials, trees, and landscape features, that perform passive solar energy functions.</p> <p>Stripping the setting of landscape features and landforms so that the effects of the wind, rain, and the sun result in accelerated deterioration of historic materials.</p> <p>Designing new addition which obscures, damages, or destroys character-defining elevations.</p>
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NEW ADDITIONS TO HISTORIC BUILDINGS:

An attached exterior addition to a historic building expands its “outer limits” to create a new profile.

Because such expansion has the capability to radically change the historic appearance, an exterior addition should be considered only after it has been determined that the new use cannot be successfully met by altering non-character-defining *interior* spaces.

If the new use cannot be this way, then an attached exterior addition is usually an acceptable alternative. New additions should be designed and constructed so that the character-defining features of the historic building are not radically changed, obscured, damaged, or destroyed in the process of rehabilitation. New design should always be clearly differentiated so that the addition does not appear to be part of the historic resources.

Note: Although the work in this section is quite often an important aspect of rehabilitation projects, it is usually not part of the overall process of preserving character-defining features (identify, protect, repair, replace); rather, such work is assessed for its potential negative impact on the building’s historic character. For this reason, particular care must be taken not to obscure, radically change, damage, or destroy character-defining features in the process of constructing a new addition.

<u>Recommended</u>	<u>Not Recommended</u>
Placing functions and services required for the new use in non-character-defining interior spaces rather than installing a new addition.	Expanding the size of the historic building by constructing a new addition when the new use could be met by altering non-character-defining interior spaces.
Constructing a new addition so that there is the least possible loss of historic materials and so that character-defining features are not obscured, damaged, or destroyed.	Attaching a new addition so that the character-defining features of the historic building are obscured, damaged, or destroyed.
Locating the attached exterior addition at the rear or on an inconspicuous side of a historic building; and limiting its size and scale in relationship to the historic building.	Designing a new addition so that its size and scale in relation to the historic building are out of proportion, thus diminishing the historic character.
Designing new additions in a manner that makes clear what is historic and what is new.	Duplicating the exact form, material, style, and detailing of the historic building in the new addition so that the new work appears to be part of the historic building.
Considering the attached exterior addition both in terms of the new use and the appearance of other buildings in the historic district or neighborhood. Design for the new work may be contemporary or may reference design motifs from the historic building.	Imitating a historic style or period of architecture in new additions, especially for contemporary uses such as drive-in banks or garages.
In either case, it should always be clearly differentiated from the historic building and be compatible in terms of mass, materials, relationship of solids to voids, and color.	Designing and constructing new additions that result in the diminution or loss of the historic character of the resource, including its design, materials, workmanship, location, or setting.

<p>Placing new additions such as balconies and greenhouses on non-character-defining elevations and limiting the size and scale in relationship to the historic building.</p> <p>Designing additional stories, when required for the new use, that are set back from the wall plane and are as inconspicuous as possible when viewed from the street.</p>	<p>Using the same wall plane, roof line, cornice height, materials, siding lap or window type to make additions appear to be a part of the historic building.</p> <p>Designing new additions such as multistory greenhouse additions that obscure, damage, or destroy character-defining features of the historic building.</p> <p>Constructing additional stories so that the historic appearance of the building is radically changed.</p>
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ACCESSIBILITY:

It is often necessary to make modifications to a historic building so that it will be in compliance with current accessibility code requirements.

Accessibility to certain historic structures is required by three specific federal laws: the Architectural Barriers Act of 1968, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act of 1990. Federal rules, regulations, and standards have been developed which provide guidance on how to accomplish access in historic areas for people with disabilities. Work must be carefully planned and undertaken so it does not result in the loss of character-defining spaces, features, and finishes. The goal is to provide the highest level of access with the lowest level of impact

Note: Although the work in this section is quite often an important aspect of rehabilitation projects, it is usually not part of the overall process of preserving character-defining features (identify, protect, repair, replace); rather, such work is assessed for its potential negative impact on the building's historic character. For this reason, particular care must be taken not to obscure, radically change, damage, or destroy character-defining features in the process of rehabilitation work to meet accessibility requirements.

<u>Recommended</u>	<u>Not Recommended</u>
<p>Identifying the historic building’s character-defining spaces, features, and finishes so that accessibility code-required work will not result in their damage or loss.</p>	<p>Undertaking code-required alterations to a building or site before identifying those spaces, features, or finishes which are character-defining and must therefore be preserved.</p>
<p>Comply with barrier-free access requirements, in such a manner that character-defining spaces, features, and finishes are preserved.</p>	<p>Altering, damaging, or destroying character-defining features in attempting to comply with accessibility requirements.</p>
<p>Working with local disability groups, access specialists, and historic preservation specialists to determine the most appropriate solution to access problems.</p>	<p>Making changes to buildings without first seeking expert advice from access specialists and historic preservationists, to determine solutions.</p>
<p>Providing barrier-free access that promotes independence for the disabled person to the highest degree practicable, while preserving significant historic features.</p>	<p>Making access modifications that do not provide a reasonable balance between independent, safe access and preservation of historic features.</p>
<p>Designing new or additional means of access that are compatible with the historic building and its setting.</p>	<p>Designing new or additional means of access without considering the impact on the historic property and its setting.</p>

HEALTH AND SAFETY:

In undertaking rehabilitation work on historic buildings, it is necessary to consider the impact that meeting current health and safety codes (public health, occupational health, life safety, fire safety, electrical, structural and building codes) will have on character-defining spaces, features, and finishes.

Special coordination with the responsible code officials at the state, county or municipal level may be required. Securing required building permits and occupancy licenses is best accomplished early in work project planning. It is often necessary to look beyond the "letter" of code requirements to their underlying purpose; most modern codes allow for alternative approaches and reasonable variance to achieve compliance.

Some historic building materials (insulation, lead paint, etc.) contain toxic substances that are potentially hazardous to building occupants. Following careful investigation and analysis, some form of abatement may be required. All workers involved in the encapsulation, repair, or removal of known toxic materials should be adequately trained and should wear proper personal protective gear. Finally, preventive and routine maintenance programs for historic structures known to contain such materials should also be developed to include proper warnings and precautions.

Note: Although the work in this section is quite often an important aspect of rehabilitation projects, it is usually not part of the overall process of preserving character-defining features (identify, protect, repair, replace); rather, such work is assessed for its potential negative impact on the building's historic character. For this reason, particular care must be taken not to obscure, radically change, damage, or destroy character-defining features in the process of rehabilitation work to meet health and safety code requirements.

<u>Recommended</u>	<u>Not Recommended</u>
Identifying the historic building's character-defining spaces, features, and finishes so that code required work will not result in their damage or loss.	Undertaking code-required alterations to a building or site before identifying those spaces, features, or finishes which are character-defining and must therefore be preserved.
Complying with health and safety code, including seismic codes requirements, in such a manner that character-defining spaces, features, and finishes are preserved.	Altering, damaging, or destroying character-defining spaces, features, and finishes while making modifications to a building or site to comply with safety codes.
Removing toxic building materials only after thorough testing has been conducted and only after less invasive abatement methods have been shown to be inadequate.	Destroying historic interior features and finishes without careful testing and without considering less invasive abatement methods.
Providing workers with appropriate personal protective equipment for hazards found in the worksite.	Removing unhealthful building materials without regard to personal and environmental safety.
Working with local code officials to investigate systems, methods, or devices of equivalent or superior effectiveness and safety to those	Making changes to historic buildings without first exploring equivalent health and safety systems, methods, or devices that may be less damaging to historic spaces, features, and finishes.

<p>prescribed by code so that unnecessary alterations can be avoided.</p> <p>Upgrading historic stairways and elevators to meet health and safety codes in a manner that assures their preservation, i.e. so that they are not damaged or obscured.</p> <p>Installing sensitively designed fire suppressions systems, such as a sprinkler system that result in retention of historic features and finishes.</p> <p>Applying fire-retardant coatings, such as intumescent paints, which expand during fire to add thermal protection to steel.</p> <p>Adding a new stairway or elevator to meet health and safety codes in a manner that preserves adjacent character-defining features and space.</p> <p>Placing a code-required stairway or elevator that cannot be accommodated within the historic building in a new exterior addition. Such an addition should be on an inconspicuous elevation.</p>	<p>Damaging or obscuring historic stairways and elevators or altering adjacent spaces in the process of doing work to meet code requirements.</p> <p>Covering character-defining wood features with fire-resistant sheathing which results in altering their visual appearance.</p> <p>Using fire-retardant coatings if they damage or obscure character-defining features.</p> <p>Radically changing, damaging, or destroying character-defining spaces, features, or finishes when adding a new code required stairway or elevator.</p> <p>Constructing a new addition to accommodate code-required stairs and elevators on character-defining elevations highly visible from the street; or where it obscures, damages or destroys character-defining features.</p>
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AN ORDINANCE AMENDING THE ZONING ORDINANCE AND HISTORIC HANDBOOK
OF THE CITY OF CONCORD, NORTH CAROLINA

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by the North Carolina General Statute §160A-364 enacted an Official Zoning Ordinance for the City of Concord, North Carolina and the Area of Extraterritorial Jurisdiction on July 28, 1977; and

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by North Carolina General Statute §§160D-601 through 160D-605, 160D-701 through 160D-706, 160D-801 through 160D-808 and 160D-901 through 160D-951, may from time to time as necessary amend, supplement, change, modify or repeal certain of its zoning regulations and restrictions and zone boundaries; and

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by North Carolina General Statute 160D-601 through 160D-605, 160D-701 through 160D-706, 160D-801 through 160D-808 and 160D-901 through 160D-951 does hereby recognize a need to amend the text of certain articles of the City of Concord Development Ordinance.

NOW, THEREFORE, BE IT ORDAINED by the City Council of the City of Concord, North Carolina:

SECTION 1: That the Table of Contents, Chapters 1, 3, 4, and 5, and Appendix A of the Historic Handbook incorporated into the Concord Development Ordinance by reference (CDO Article 9.8), be repealed and adopted in the form of the attached document.

SECTION 2: That all remaining Articles and Sections of this Ordinance be renumbered to include the newly created Articles and Sections.

SECTION 3: That this Ordinance be effective immediately upon adoption.

Adopted in this July 8th, 2021.

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

ATTEST:

William C. Dusch, Mayor

Kim Deason, City Clerk

VaLerie Kolczynski, City Attorney



DATE: July 8, 2021
CASE: LUP-01-21 Amendment to the Future Land Use Map
PREPARED BY: Kevin Ashley, AICP –Deputy Planning Director

BACKGROUND

Section 1.2.4 of the Concord Development Ordinance (CDO) sets forth a process where a decision-making body can initiate an amendment to the Future Land Use Plan (the LUP). The City Council has requested that a map/text amendment be considered on the following property:

LOCATION: Northeast quadrant of Concord Parkway and George Liles Parkway
PARCEL PIN: 5610-21-6230
AREA: 385+/- acres
CURRENT FUTURE LAND USE DESIGNATION: Mixed Use Activity Center (MUAC)
PROPOSED FUTURE LAND USE DESIGNATION: Industrial Employment (IE)

The subject property is approximately 385 acres (based upon Cabarrus County Property Appraiser data) and is the northernmost property ownership of the Bootsmead LLC property, which was formerly known as the Philip Morris land. This property is separated from the main campus, is vacant land and has at times, been utilized for grazing of cattle and/or growing crops. The land is currently designated as Mixed Use Activity Center (MUAC) and is predominately zoned Heavy Industrial (I-2). A 100-foot-wide strip along the northern property boundary, generally adjacent to the Cabarrus County Club property is zoned Agricultural (AG), which is intended to serve as a buffer.

Following is an excerpt from Section 11.4 of the Future Land Use Plan.

11.4 FUTURE LAND USE AMENDMENTS

“The Growth Concept and Future Land Use maps are intended to serve as a guide for public and private development and land use decisions. The City has adopted a formal amendment process in the CDO. Land use amendments are anticipated as growth occurs and market conditions change. While land use amendments may occur more frequently than policy changes, they should not occur more than three times per year. By limiting opportunities to amend opportunities to amend the Growth Concept and Future Land Use maps, the City will reduce the potential for incremental land use changes that result in unintended policy shifts.”

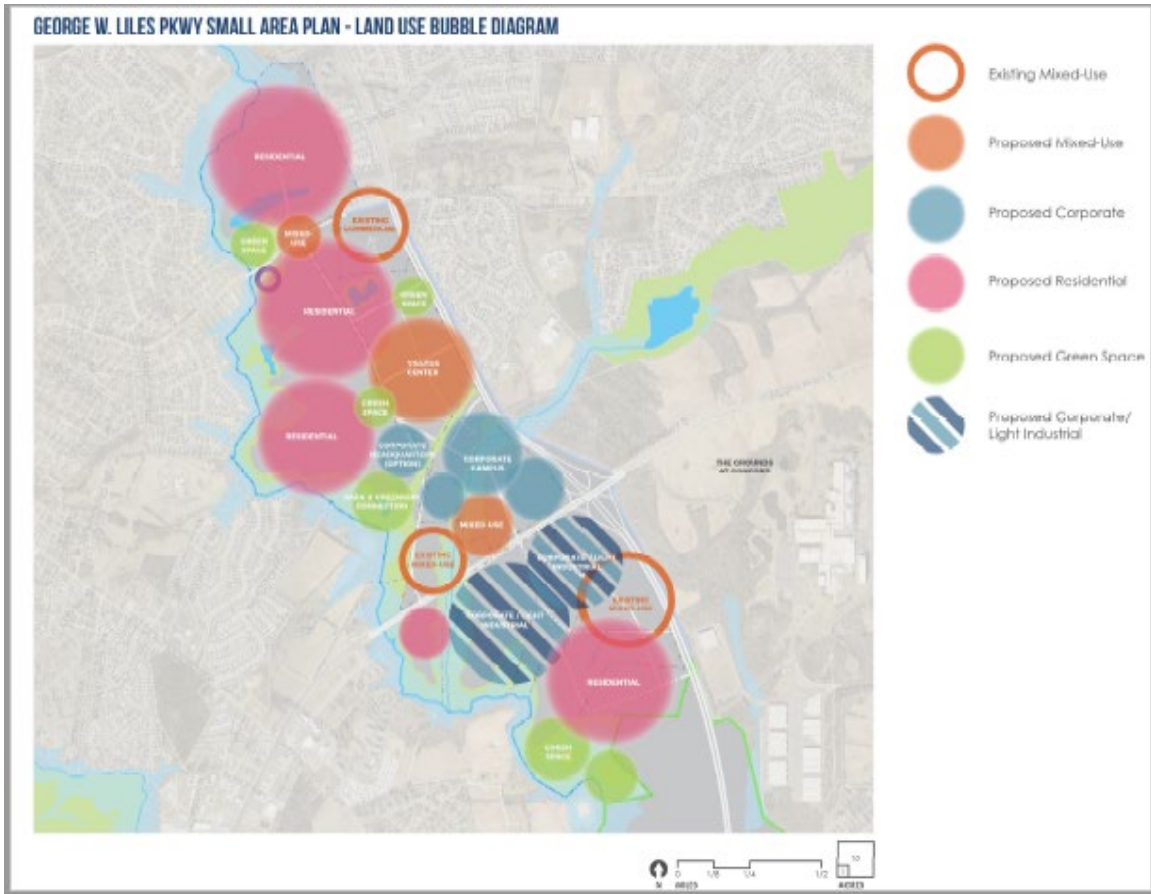
The characteristics of the property, most notably its size and location, have led staff and Council to re-examine the feasibility of the MUAC designation on the property, as opposed to Industrial Employment,(IE) which is the designation on the main campus property on the south side of Concord Parkway.

Following is a summary of the rationale leading to this determination.

1. The site is directly adjacent to property included in the boundaries of the proposed George Liles Small Area Plan, or SAP (which is almost complete). From a planning perspective, the MUAC designation and resultant land uses (particularly residential) is better served within the boundaries of the SAP, along George Liles Parkway where residential uses are already established.
2. Development of the site as a mixed-use development (as opposed to industrial) would eliminate a major portion of the City's total I-2 zoned property.
3. I-2 zoning is the district which is intended to accommodate manufacturing employment and loss of 385 acres of land for potential employment would be significant.
4. Development of the site as a mixed-use project could potentially hinder the development employment uses on the south side of Concord Parkway (the former Philip Morris campus).
5. The subject property has over one mile of frontage on Concord Parkway which affords favorable options for multiple access for industrial uses.

The property also lies within the Central Concord Character Area. Section 4.3.2 contains a statement relative to the subject property. It is recommended that this section be amended in the manner shown.

Heading away from downtown, the former Philip Morris/ALEVO site that fronts on the south side of the Concord Parkway corridor provides opportunities for a large-scale high visibility industrial and/or corporate campus development. **The former Philip Morris land located on the north side of Concord Parkway is suitable for a similar use.** ~~Facing this site on the north side of the corridor is significant acreage of land currently used for agricultural purposes that backs up to the Cabarrus Country Club that is well suited for a mixed-use development that mirrors the mixed use development patterns of the~~ **The Roberta Church Road draft George W. Liles Parkway Small Area Plan** shown in Map 4-3 (note that the current map will be replaced with the graphic on the following page) **illustrates the anticipated development pattern in the vicinity. This graphic is a land use bubble diagram which illustrates a master planned mixed use development west of the Concord Parkway and George W. Liles Parkway interchange.** ~~The Plan includes industrial uses, commercial uses along Concord Parkway, a mix of residential, service, public and village center uses in the remainder of the plan area.~~



MAP 4-3

Section 1.2.4.B.5 of the CDO sets forth Standards of Review for amendments to the Land Use Plan. This section states:

Proposals to amend the Land Use Plan shall be evaluated based upon whether the amendment is necessary in order to address conditions, including, but not limited to the following:

- A. A correction to the Land Use Plan due to an inconsistency with the underlying zoning;
- B. A boundary change of particular land use resulting from a small area plan study or district plan;
- C. A correction to the Land Use Map that matches the parcel boundary for a particular use;
- D. A change in projections or assumptions from those on which the Land Use Plan is based;
- E. Identification of new issues, needs, or opportunities that are not adequately addressed in the Land Use Plan;
- F. A change in the policies, objectives, principles, or standards governing the physical development of the City or any other geographic areas addressed by the Land Use Plan; or
- G. Identification of errors or omissions in the Land Use Plan.

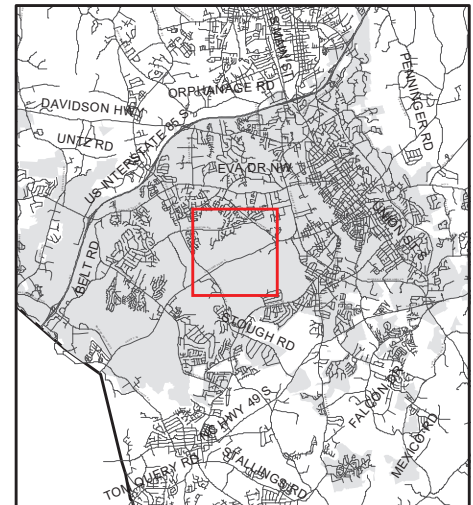
As previously discussed, relative to the rationale for the change, there is an inconsistency with the underlying zoning as I-2 is not permissible within the MUAC designation. Furthermore, the George W. Liles Small Area Plan indicates a more favorable location for a mixed-use activity center.

Planning and Zoning Commission voted unanimously for approval of the amendment at their June 15 meeting.

LUP-01-21
Aerial

Land Use Plan Amendment
Mixed-Use Activity Center
to
Industrial-Employment

Concord Pkwy S
PIN: 5610-21-6230



Source: City of Concord
Planning Department

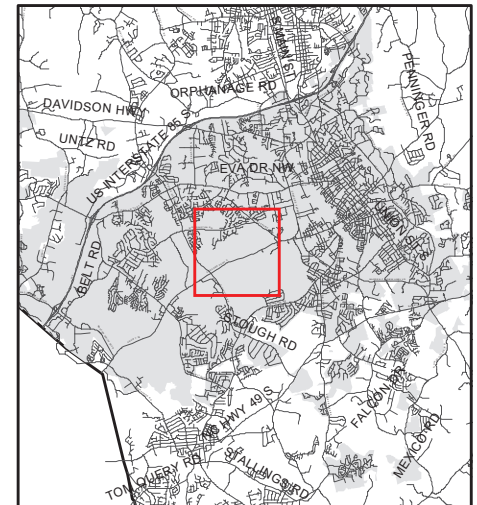
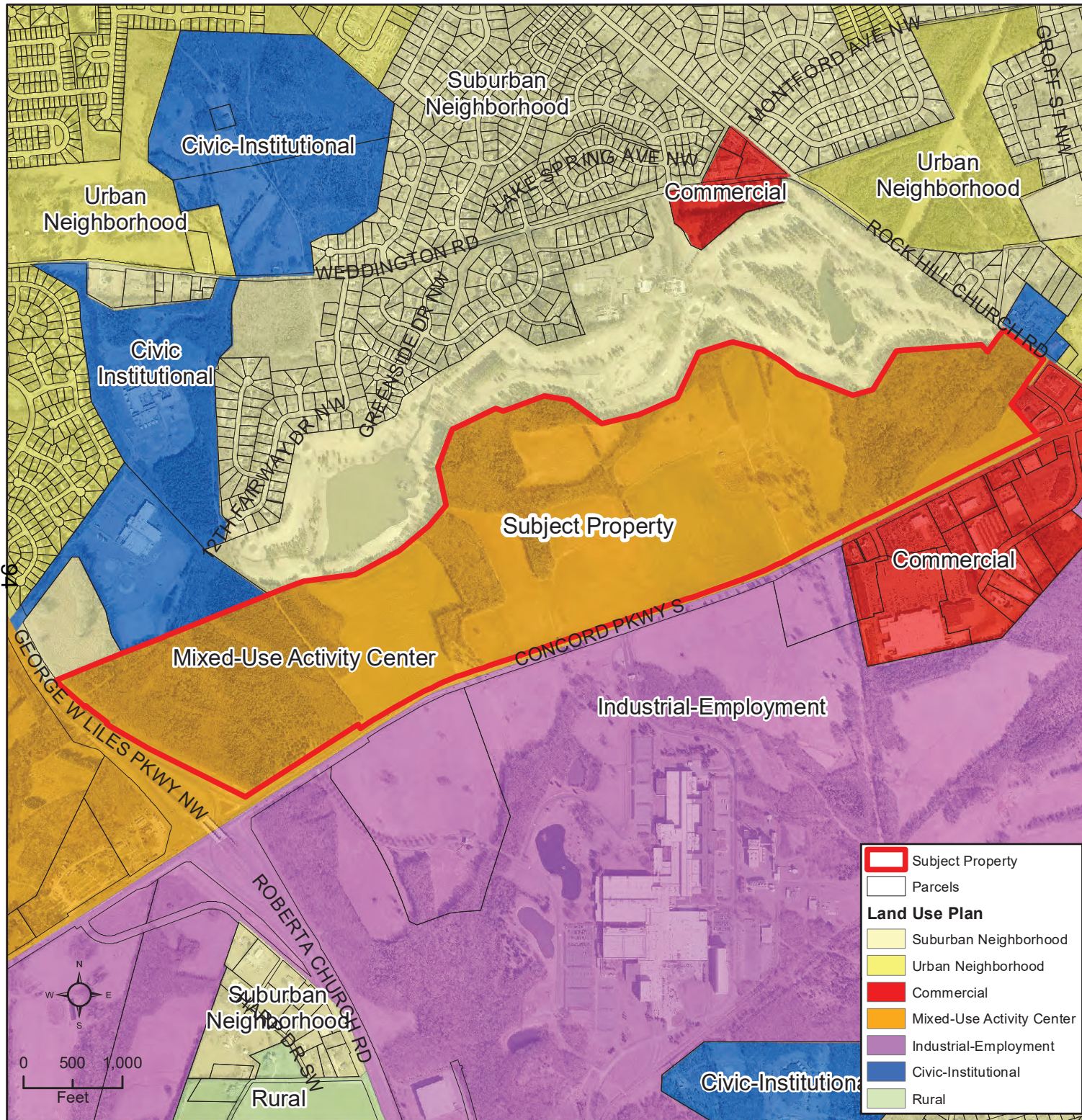
Disclaimer

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**LUP-01-21
Land Use Plan**

**Land Use Plan Amendment
Mixed-Use Activity Center
to
Industrial-Employment**

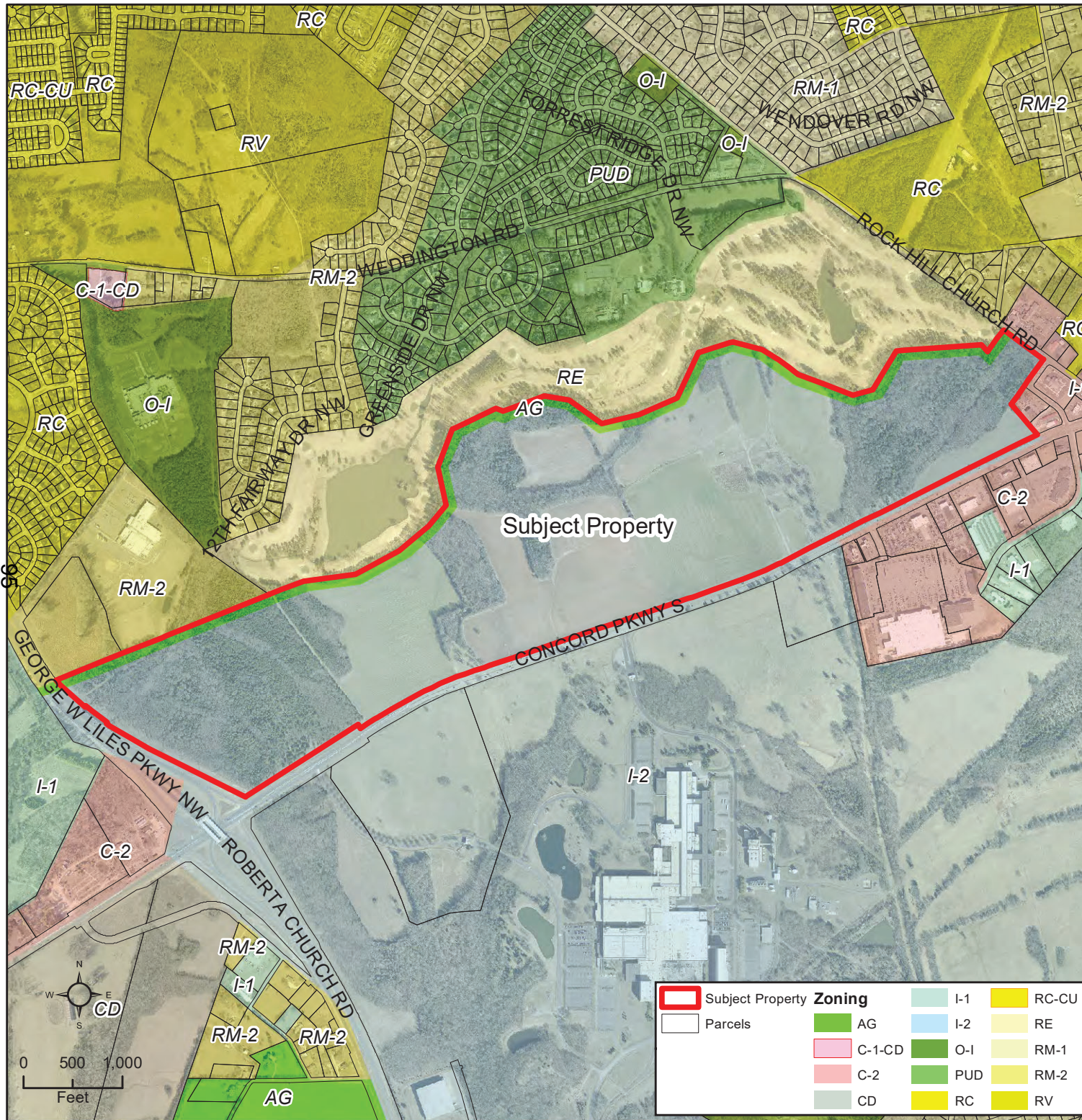
Concord Pkwy S
PIN: 5610-21-6230



Source: City of Concord
Planning Department

Disclaimer

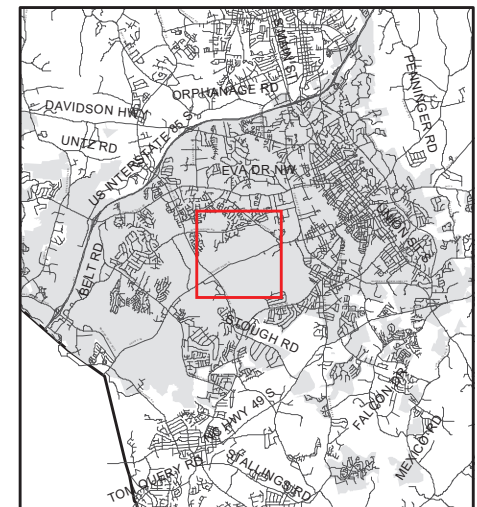
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**LUP-01-21
Zoning Map**

**Land Use Plan Amendment
Mixed-Use Activity Center
to
Industrial-Employment**

Concord Pkwy S
PIN: 5610-21-6230



Source: City of Concord
Planning Department

Disclaimer

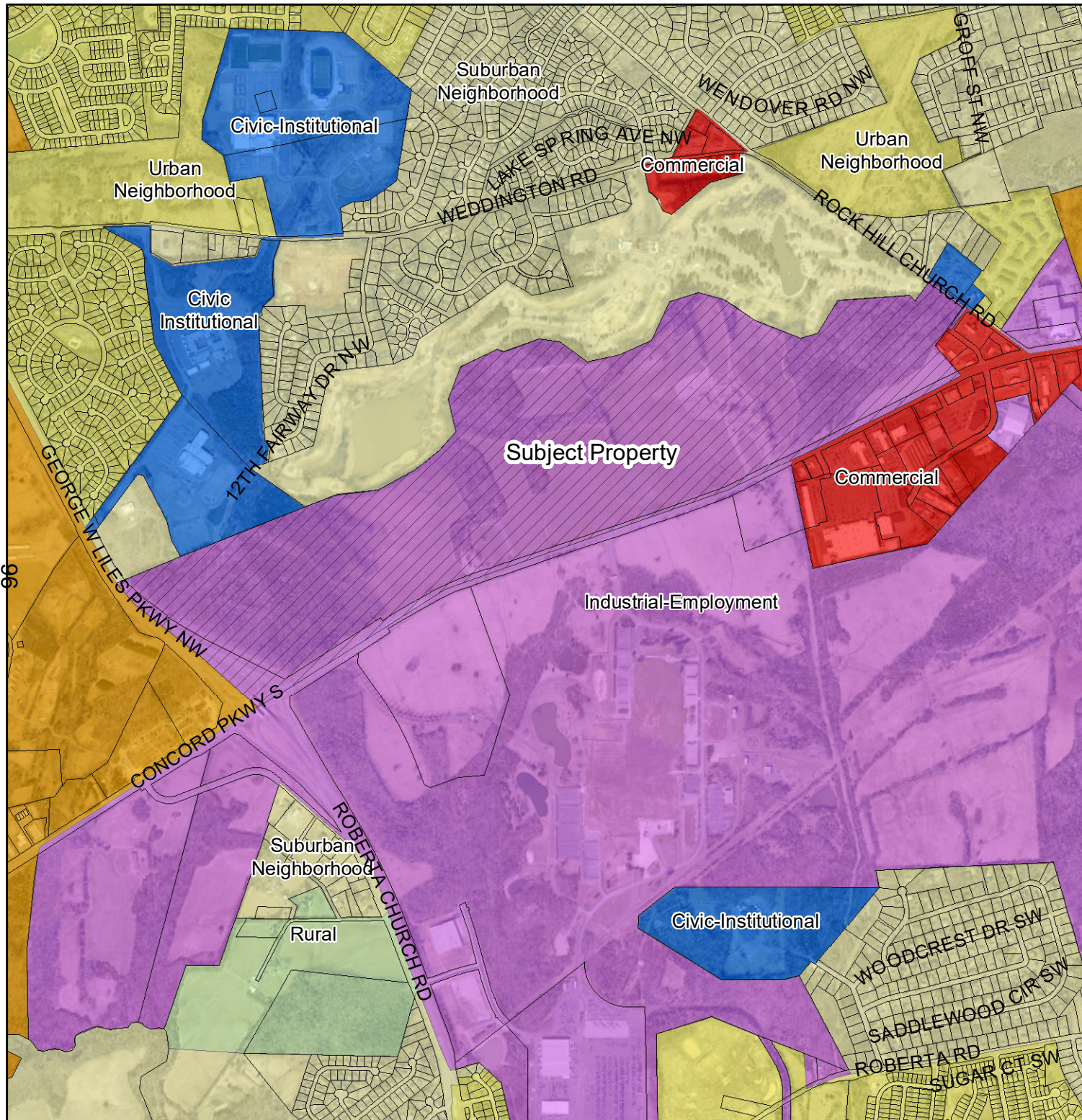
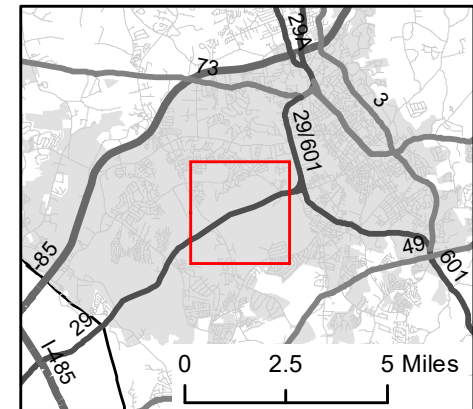
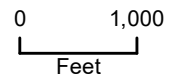
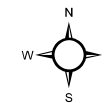
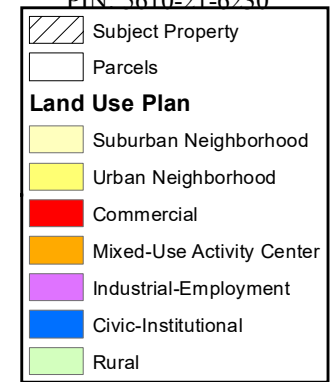
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PROPOSED MAP CHANGE

LUP-01-21 Land Use Plan Amendment

Mixed-Use Activity Center to Industrial-Employment

Concord Pkwy S
PIN: 5610-21-6230



4.3.2 CENTRAL CONCORD CHARACTER AREA

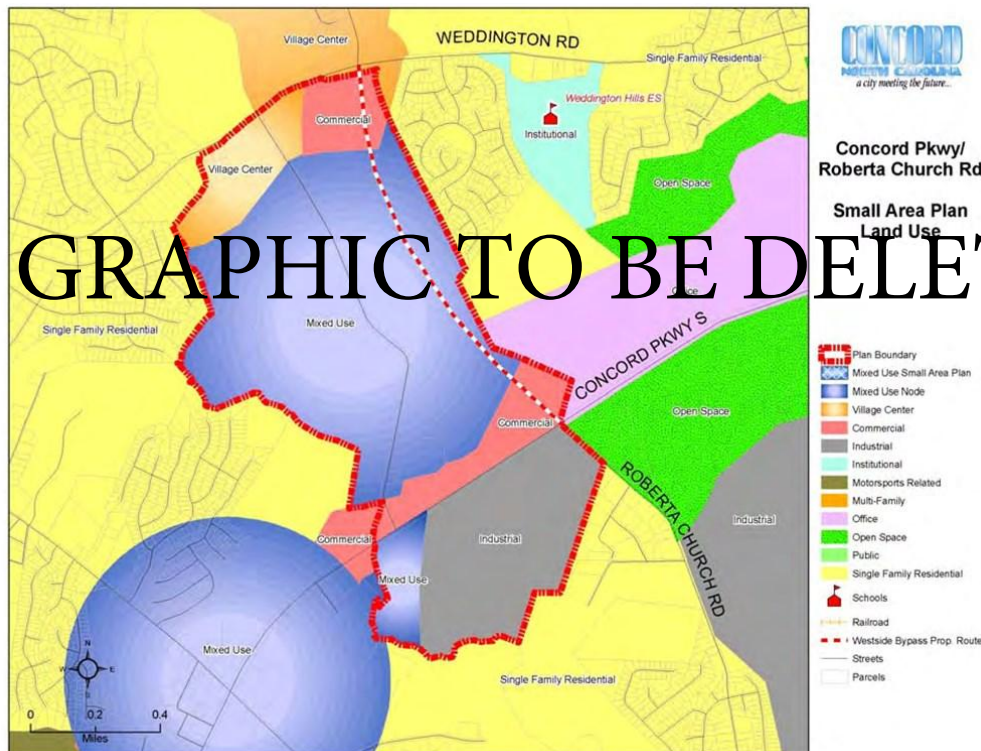
As shown in **Map 4-1**, the Central Concord Character Area extends southwest along Concord Parkway (US 29) from Wolf Meadow Branch (west of the Wal-Mart Super Center) past the corridor’s intersection with Pitts School Road. There are two planned Mixed-Use Activity Centers along Concord Parkway – one at George W. Liles Parkway and one at Pitts School Road. While largely undeveloped today, the Concord Parkway corridor and the adjacent areas that represent Central Concord are planned to accommodate significant amounts of residential, commercial and industrial development over the next ten years. As this growth occurs, the City will face the following challenges:

- Maintaining Concord Parkway as an attractive corridor that serves as a primary gateway to Downtown Concord.
- Serving a mix of travel modes along Concord Parkway, including motorists, transit (both bus and the long-term potential for light rail/commuter rail), bicyclists and pedestrians (particularly within the activity centers).
- Providing multi-modal connections between uses within the activity centers.
- Ensuring compatible transitions between industrial, commercial and residential land uses.

While future rail service from Concord to Charlotte is not a given, the City has a strong interest in preserving the opportunity for future service along the Concord Parkway corridor, which provides the most direct route from Downtown Concord to the existing LYNX service at UNC Charlotte. The northeastern portion of this character area has abundant open land to accommodate future rail right-of-way on either side of the Concord Parkway corridor. The southwestern portion of the character area has less vacant land available within existing right of way, but retains opportunities on private property to provide parallel right-of-way. The City will need to identify and protect potential right-of-way for a preferred alignment to ensure that future rail services remains viable in this corridor.

Heading away from downtown, the former Phillip Morris/ALEVO site that fronts on the south side of the Concord Parkway corridor provides opportunities for a large-scale high visibility corporate campus development. Facing this site on the north side of the corridor is significant acreage of land currently used for agricultural purposes that backs up to the Cabarrus Country Club that is well suited for a mixed-use development that mirrors the mixed-use development patterns of the Roberta Church Road Small Area Plan shown in **Map 4-3**. The Plan includes industrial uses, commercial uses along Concord Parkway, a mix of residential, service, public and village center uses in the remainder of the plan area.

Map 4-3: Concord Parkway/Roberta Church Road Small Area Plan



(Source: City of Concord)

4.3.2 central concord character area

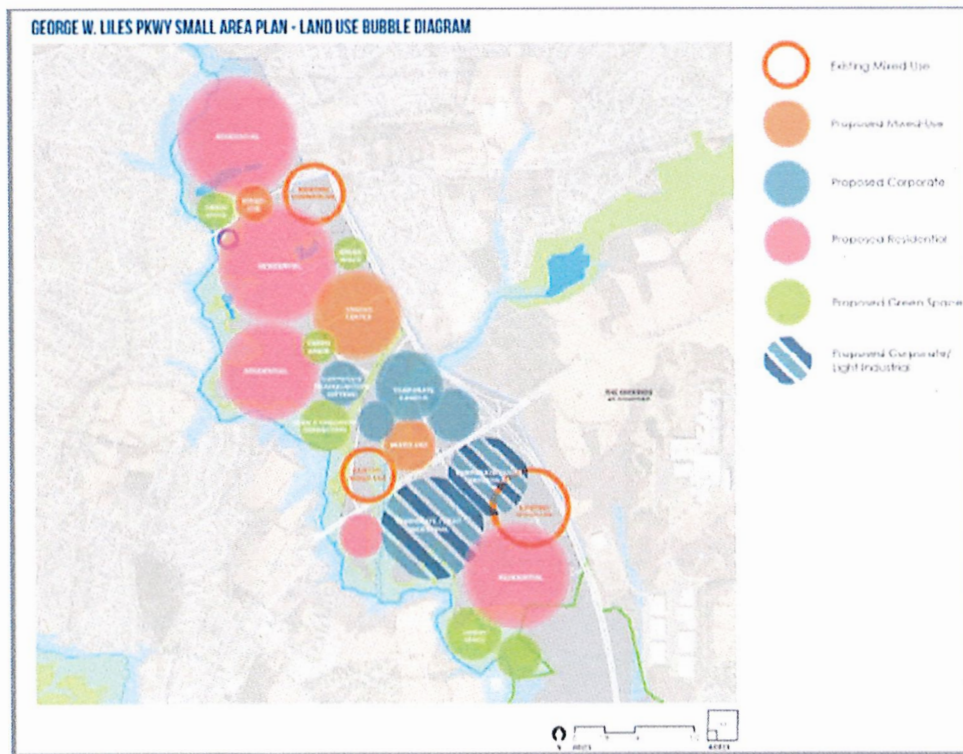
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While future rail service from Concord to Charlotte is not a given, the City has a strong interest in preserving the opportunity for future service along the Concord Parkway corridor, which provides the most direct route from Downtown Concord to the existing LYNX service at UNC Charlotte. The northeastern portion of this character area has abundant open land to accommodate future rail right-of-way on either side of the Concord Parkway corridor. The southwestern portion of the character area has less vacant land available within existing right of way, but retains opportunities on private property to provide parallel right-of-way. The City will need to identify and protect potential right-of-way for a preferred alignment to ensure that future rail services remains viable in this corridor.

Heading away from downtown, the former Phillip Morris/ALEVO site that fronts on the south side of the Concord Parkway corridor provides opportunities for a large-scale high visibility corporate campus development. The former Philp Morris land located on the north side of Concord Parkway is suitable for a similar use. The draft George W. Liles Parkway Small Area Plan shown in **Map 4-3** illustrates the anticipated development pattern in the vicinity. This graphic is a land use bubble diagram which illustrates a master planned mixed use development west of the Concord Parkway and George W. Liles Parkway interchange.

Map 4-3: George W. Liles Small Area Plan



(Source: City of Concord)

AN ORDINANCE AMENDING THE 2030 LAND USE PLAN
OF THE CITY OF CONCORD, NORTH CAROLINA

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by the North Carolina General Statute §160A-364 enacted an Official Zoning Ordinance for the City of Concord, North Carolina and the Area of Extraterritorial Jurisdiction on July 28, 1977; and

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by North Carolina General Statute §§160A-364 through §160D-601 through 160D-605, 160D-701 through 160D-706, 160D-801 through 160D-808 and 160D-901 through 160D-951 may from time to time as necessary amend, supplement, change, modify or repeal certain of its zoning regulations and restrictions and zone boundaries; and

WHEREAS, the City of Concord, North Carolina pursuant to the authority conferred by North Carolina General Statute 160D-601 through 160D-605, 160D-701 through 160D-706, 160D-801 through 160D-808 and 160D-901 through 160D-951 does hereby recognize a need to amend the text of certain articles of the City of Concord Development Ordinance.

NOW, THEREFORE, BE IT ORDAINED by the City Council of the City of Concord, North Carolina:

SECTION 1: That the 2030 Land Use Plan “Map 5-1, Future Land Use Categories” be amended to reflect the change illustrated in Exhibit A.

SECTION 2: That the 2030 Land Use Plan “Section 4.3.2, Central Concord Character Area” be amended as illustrated in Exhibit B.

SECTION 2: That this Ordinance be effective immediately upon adoption.

Adopted in this July 8th, 2021.

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

ATTEST:

William C. Dusch, Mayor

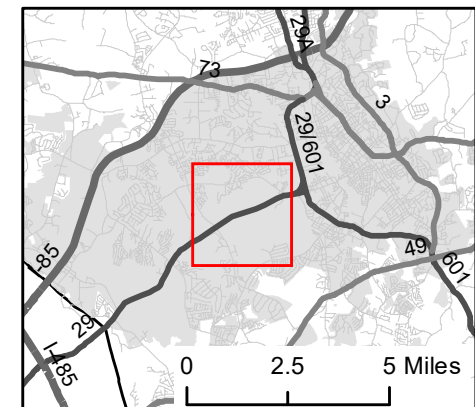
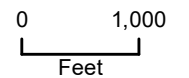
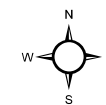
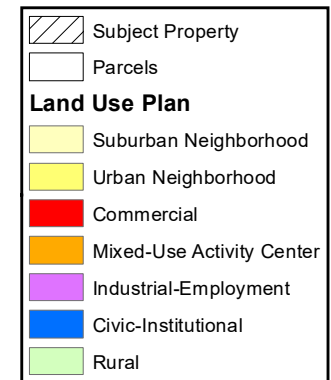
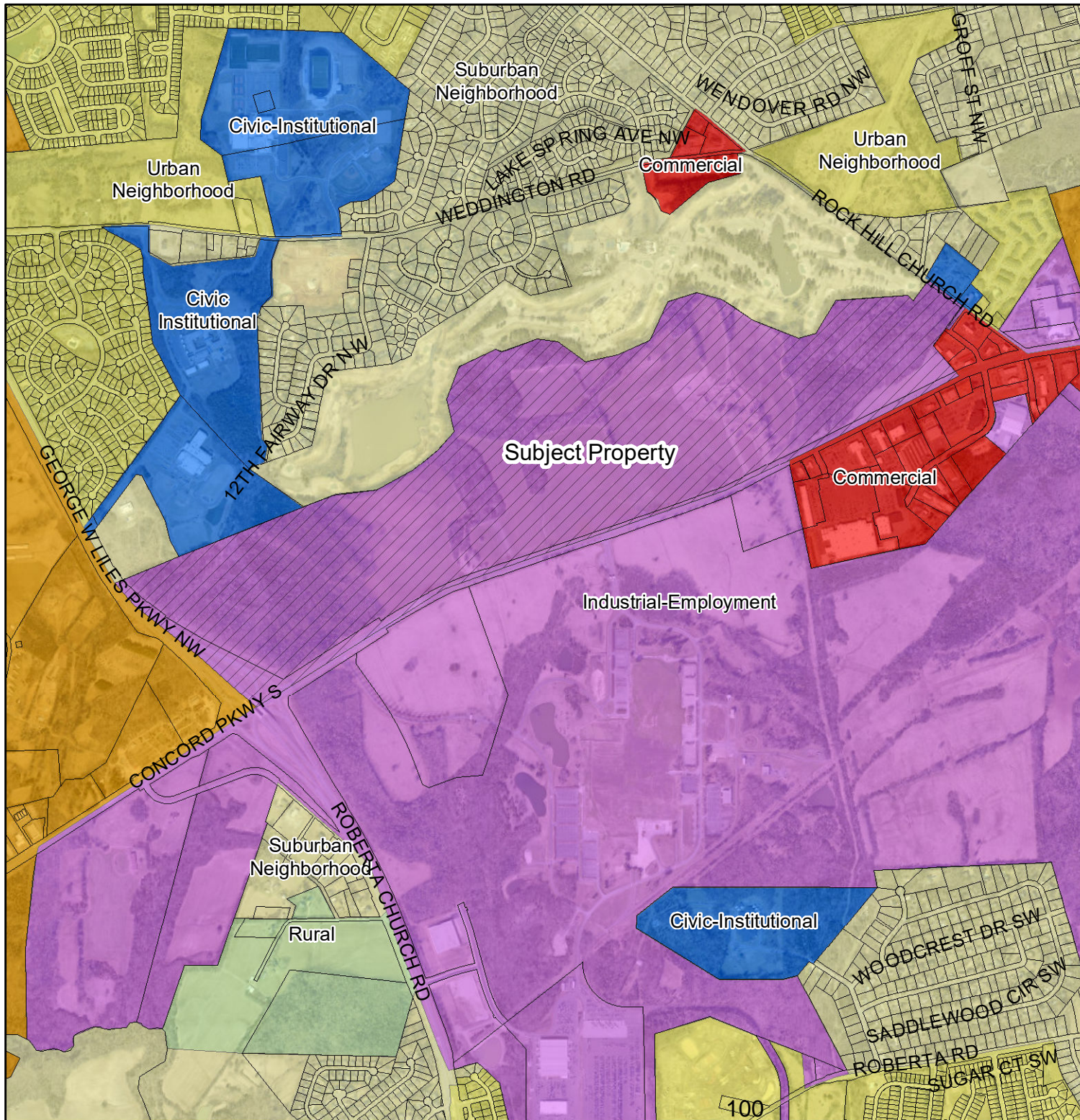
Kim Deason, City Clerk

VaLerie Kolczynski, City Attorney

EXHIBIT A

LUP-01-21 Land Use Plan Amendment Mixed-Use Activity Center to Industrial-Employment

Concord Pkwy S
PIN: 5610-21-6230



Source: City of Concord
Planning & Neighborhood Development Department

4.3.2 central concord character area

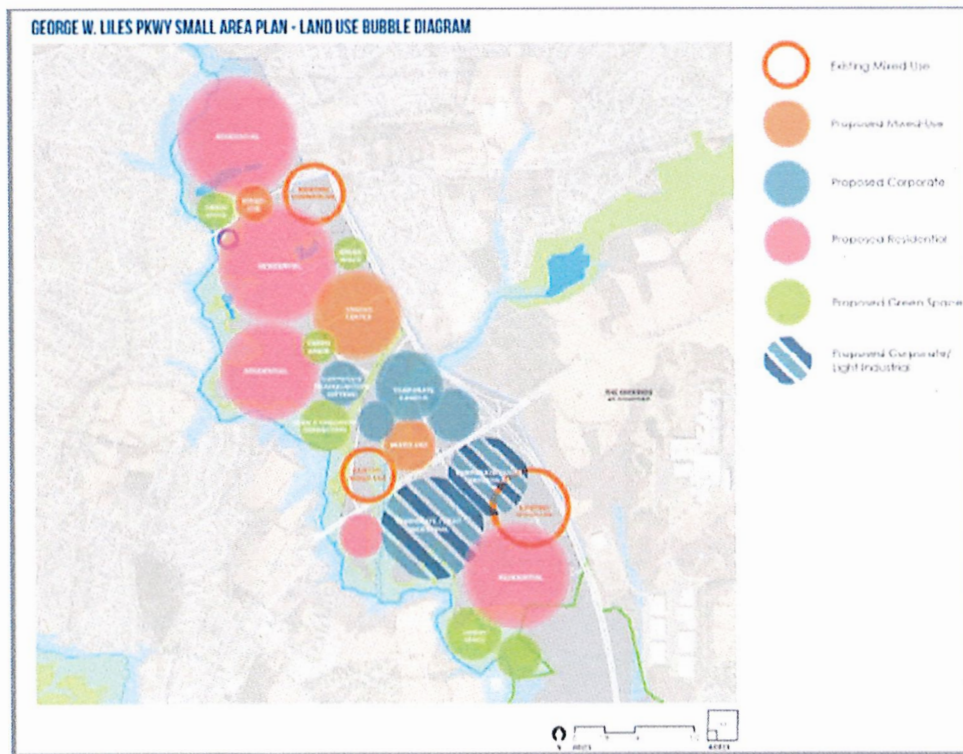
As shown in **Map 4-1**, the Central Concord Character Area extends southwest along Concord Parkway (US 29) from Wolf Meadow Branch (west of the Wal-Mart Super Center) past the corridor’s intersection with Pitts School Road. There are two planned Mixed-Use Activity Centers along Concord Parkway – one at George W. Liles Parkway and one at Pitts School Road. While largely undeveloped today, the Concord Parkway corridor and the adjacent areas that represent Central Concord are planned to accommodate significant amounts of residential, commercial and industrial development over the next ten years. As this growth occurs, the City will face the following challenges:

- Maintaining Concord Parkway as an attractive corridor that serves as a primary gateway to Downtown Concord.
- Serving a mix of travel modes along Concord Parkway, including motorists, transit (both bus and the long-term potential for light rail/commuter rail), bicyclists and pedestrians (particularly within the activity centers).
- Providing multi-modal connections between uses within the activity centers.
- Ensuring compatible transitions between industrial, commercial and residential land uses.

While future rail service from Concord to Charlotte is not a given, the City has a strong interest in preserving the opportunity for future service along the Concord Parkway corridor, which provides the most direct route from Downtown Concord to the existing LYNX service at UNC Charlotte. The northeastern portion of this character area has abundant open land to accommodate future rail right-of-way on either side of the Concord Parkway corridor. The southwestern portion of the character area has less vacant land available within existing right of way, but retains opportunities on private property to provide parallel right-of-way. The City will need to identify and protect potential right-of-way for a preferred alignment to ensure that future rail services remains viable in this corridor.

Heading away from downtown, the former Phillip Morris/ALEVO site that fronts on the south side of the Concord Parkway corridor provides opportunities for a large-scale high visibility corporate campus development. The former Philp Morris land located on the north side of Concord Parkway is suitable for a similar use. The draft George W. Liles Parkway Small Area Plan shown in **Map 4-3** illustrates the anticipated development pattern in the vicinity. This graphic is a land use bubble diagram which illustrates a master planned mixed use development west of the Concord Parkway and George W. Liles Parkway interchange.

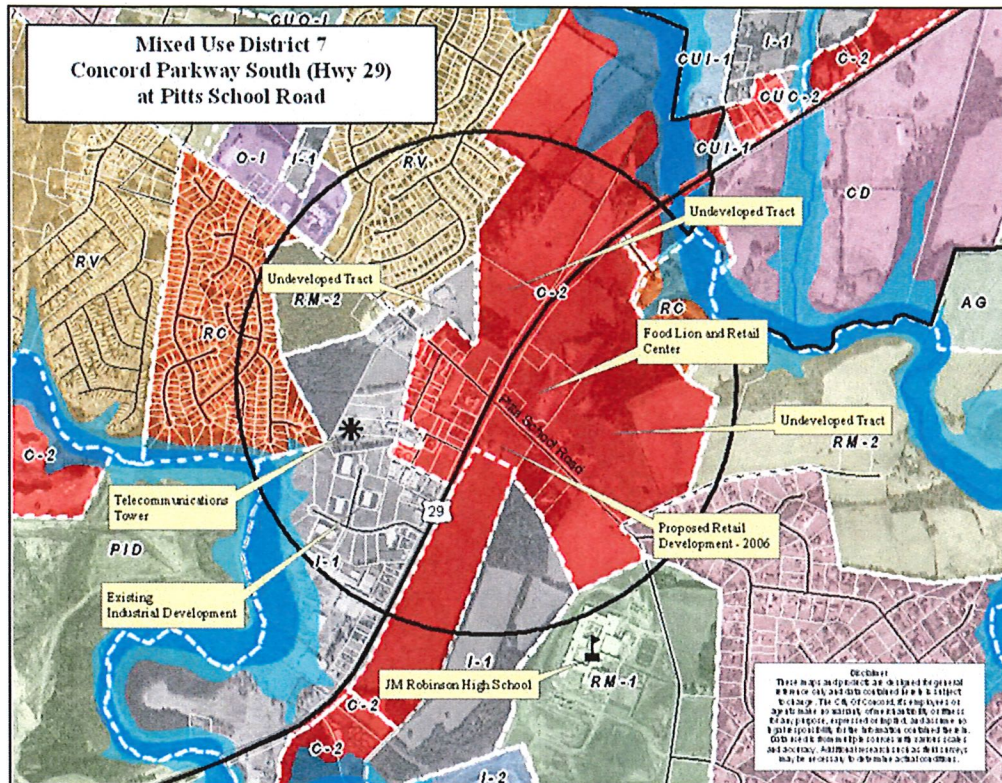
Map 4-3: George W. Liles Small Area Plan



(Source: City of Concord)

To the southwest of the area encompassed by the Roberta Church Road Small Area Plan is the Mixed Use Activity Center located at the intersection of Concord Parkway and Pitts School Road (Map 4-4). This area includes a grocery store with surrounding retail shops, gas stations, restaurants, and drug store. There is also an apartment complex in this district just north of this intersection, but is separated by vacant land. Much of the commercial development is recent and a great deal of undeveloped land remains behind this development. The southeast corner of the intersection includes a Walgreen's store, two restaurants and a Wal-Mart Neighborhood Market. Across US 29 from this location is a mixture of commercial and industrial uses. Many of the industrial buildings were built over 20 years ago and do not meet current development standards.

Map 4-4: Mixed Use District 7



(Source: City of Concord)

The current layout of development surrounding the intersection consists of conventional automobile-oriented commercial uses that abut some older industrial and commercial structures. While many of the newer commercial developments include sidewalks, the area is not conducive to bicycle or pedestrian traffic. As redevelopment occurs, the City should improve pedestrian connectivity and begin reorienting structures to support compatible integration between commercial activity around the intersection and a mix of residential development on surrounding parcels on the north side of Pitts School Road. Development along Concord Parkway to the southwest of this intersection should remain as a mix of commercial and industrial uses with a focus on visually buffering these uses from the corridor and from abutting residential development to the west of the Rocky River.

4.3.3 entertainment corridor character area

Concord Mills/Bruton Smith Boulevard connects two of Concord's biggest regional attractions and economic assets – Concord Mills on the west side of I-85 and the Charlotte Motor Speedway to the east. Exit 49 along I-85 provides easy access to these attractions for regional visitors, but the Concord Mills/Bruton Smith corridor experiences heavy traffic congestion during peak traffic periods. Between Derita Road on the west and the Speedway are traditional auto-oriented retail and a few multi-family developments within the Mixed-Use Activity Center surrounding Concord Mills, highway oriented commercial with restaurants and hotels east of I-85, and numerous auto dealerships to the west of



BID TABULATION

Name of Project: CLEARWATER CERAMICS CENTER

Location: 223 CROWELL DR.
Concord, N.C. 28025

Bid Opening: 2:00 pm, June 10, 2021

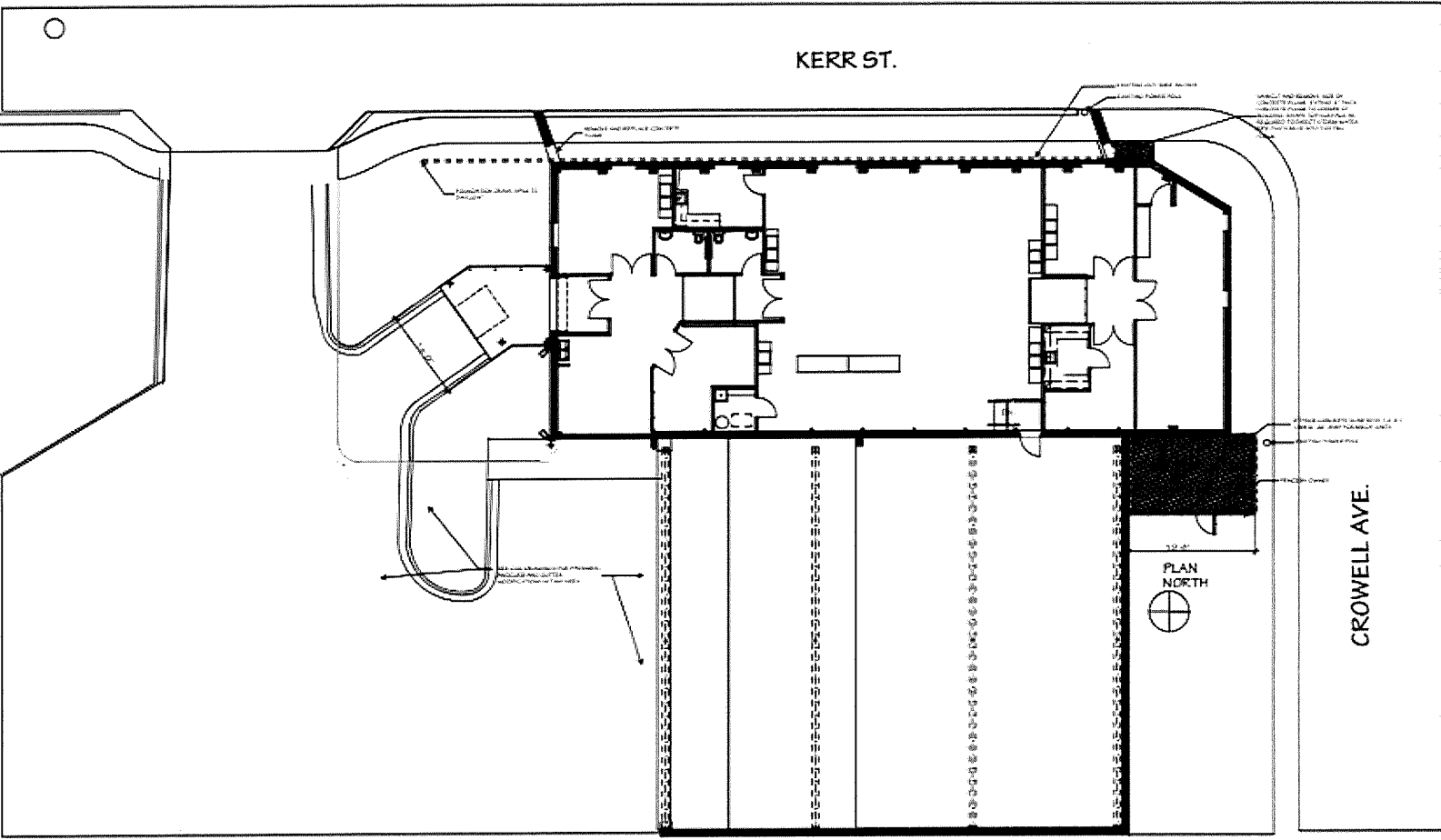
Bid Location: Concord City Hall, Planning & Community Development Conference Room

Name of Contractor	Base Bid		HUB Affidavit A	HUB Affidavit B	HUB Certified/Participation	Bid Bond	Est.Days
IKE'S CONSTRUCTION	DNB						
LILES CONSTRUCTION	\$ 1,418,900.00		x		x	x	240
KEAREY BUILDERS	\$ 1,335,900.00		x		x	x	240
NORTEK CONSTRUCTION	DNB						
MILES McCLELLAN CONSTRUCTION	\$ 1,469,000.00	\$ 3,640.00	x		x	x	240
AVM CONTRACTORS	\$ 1,470,443.00		x		x	x	240
LAFAVE'S CONSTRUCTION	\$ 1,444,000.00		<u>x</u>		<u>x</u>	<u>x</u>	240
WHARTON SMITH, INC.	DNB						
HOSS CONTRACTING	\$ 1,319,800.00	\$ 5,900.00	x		x	x	240
HOLDEN BUILDING	\$ 1,259,999.00		x		x	x	240

6/20/2017 10:41 AM - 10:42 AM - 10:43 AM - 10:44 AM - 10:45 AM - 10:46 AM - 10:47 AM - 10:48 AM - 10:49 AM - 10:50 AM - 10:51 AM - 10:52 AM - 10:53 AM - 10:54 AM - 10:55 AM - 10:56 AM - 10:57 AM - 10:58 AM - 10:59 AM - 11:00 AM - 11:01 AM - 11:02 AM - 11:03 AM - 11:04 AM - 11:05 AM - 11:06 AM - 11:07 AM - 11:08 AM - 11:09 AM - 11:10 AM - 11:11 AM - 11:12 AM - 11:13 AM - 11:14 AM - 11:15 AM - 11:16 AM - 11:17 AM - 11:18 AM - 11:19 AM - 11:20 AM - 11:21 AM - 11:22 AM - 11:23 AM - 11:24 AM - 11:25 AM - 11:26 AM - 11:27 AM - 11:28 AM - 11:29 AM - 11:30 AM - 11:31 AM - 11:32 AM - 11:33 AM - 11:34 AM - 11:35 AM - 11:36 AM - 11:37 AM - 11:38 AM - 11:39 AM - 11:40 AM - 11:41 AM - 11:42 AM - 11:43 AM - 11:44 AM - 11:45 AM - 11:46 AM - 11:47 AM - 11:48 AM - 11:49 AM - 11:50 AM - 11:51 AM - 11:52 AM - 11:53 AM - 11:54 AM - 11:55 AM - 11:56 AM - 11:57 AM - 11:58 AM - 11:59 AM - 12:00 AM



KERR ST.



CROWELL AVE.

Griffin Architecture, P.A.
 1000 W. 10th St.
 Concord, NC 28025
 Tel: 704.746.1111
 Fax: 704.746.1112

CONTRACTANTS
**McKNIGHT · SMITH
 WARD · GRIFFIN**
 ENGINEERS, INCORPORATED
 1000 W. 10th St. - 2nd Floor
 Concord, NC 28025
 Tel: 704.746.1111

**CLEARWATER
 CERAMICS
 CENTER**

223 CROWELL DR.
 CONCORD NC
 28025

REVISION NO.	REVISION DATE

ISSUE DATE:
PROJECT NO.:
MODEL FILE:
DRAWN BY:
CHECK BY: KAC
COPYRIGHT:

SHEET TITLE
**ARCHITECTURAL SITE
 PLAN**

AS-1.1

SITE PLAN

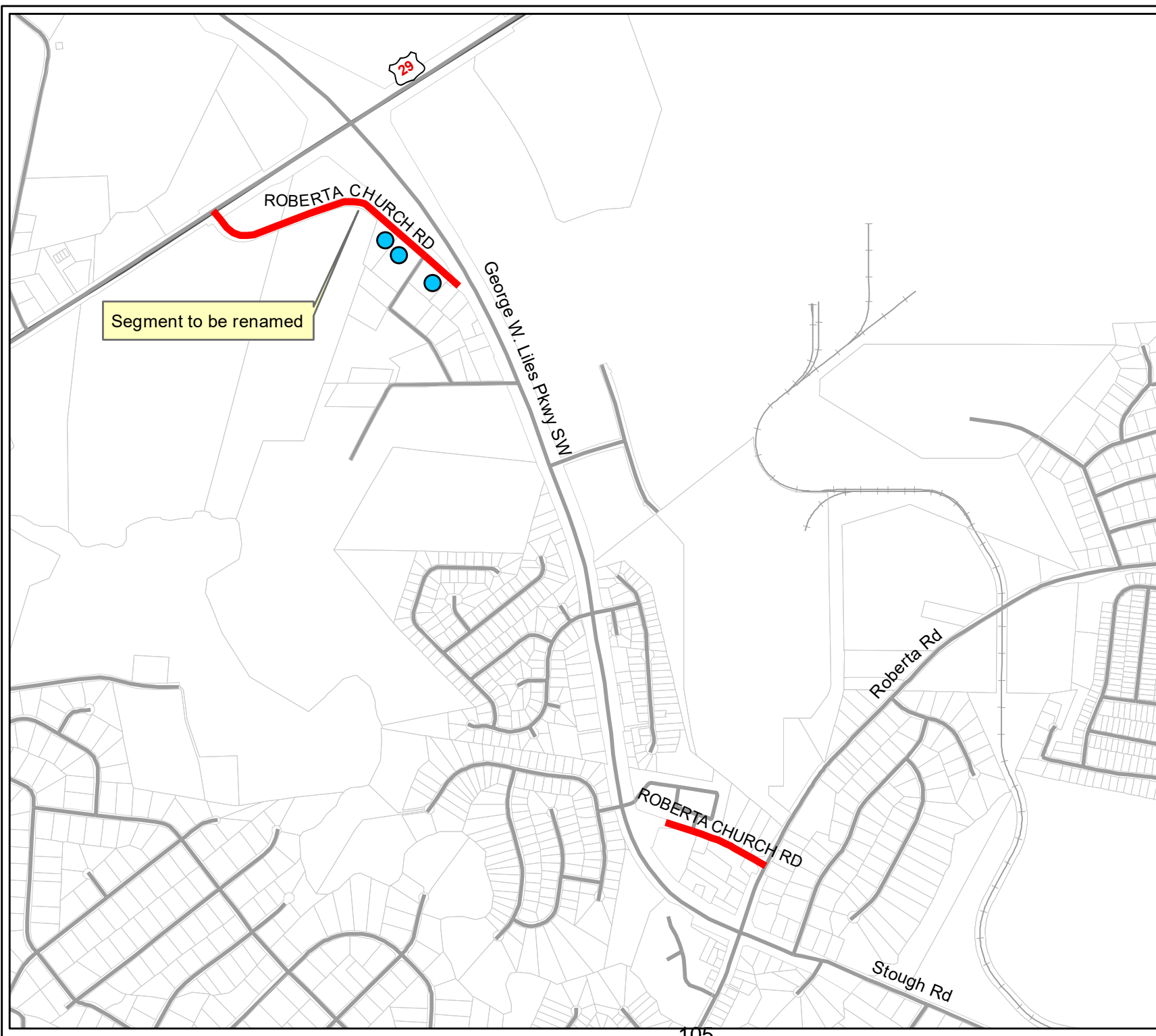
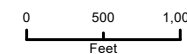
Roberta Church Rd Renaming

Legend

- Address Changes
- Roberta Church Rd
- ▭ Parcels



Coordinate System - NC State Plane NAD83



Concord ABC Board

**230 International Drive
Concord, NC 28027**

June 17, 2021

The Concord ABC Board Members have requested an increase in salary of \$75.00 per meeting. The last increase was November 2016. The current rate is \$250.00 for the chairman and \$200.00 for member.

The Councils viewing and approval would be greatly appreciated.

MEMORANDUM

TO: Lloyd Wm. Payne, Jr., City Manager
FROM: Katherine Ramirez Campbell, Community Outreach Coordinator
DATE: June 25, 2021
RE: Neighborhood Matching Grant (NMG) Funding Recommendations, FY 2021/2022

The following is a brief description of NMG projects, which are being recommended for funding. The review committee determined that nine projects best meet the criteria for funding. The nine recommended projects, if funded, total \$30,000 which is the full NMG program amount included in the FY22 adopted budget.

Hidden Pond

Pond Seating Project

Project Amount - \$3,407

Request \$1,705 matching grant funds to support the Pond Seating Project. This project will include purchasing outdoor benches to be placed around the ponds in the Hidden Pond neighborhood. Neighborhood volunteers will assemble and secure the benches to provide places for neighbors to sit, socialize, and enjoy the ponds.

Funding Request- \$1,705

Winding Walk

Pet Stations and Benches

Project Amount - \$6,624

Request \$3,000 matching grant funds to support the installations of neighborhood pet stations to help keep the Winding Walk community clean and prevent soil and waterway contamination, and the spread of parasites and diseases. This environmental project will also improve the beautification of the neighborhood and involve homeowners by having a community dog walk once the pet stations are installed to bring the community together. The project would also involve adding two benches at a school bus stop to provide a place for children to safely wait for their bus away from the road.

Funding Request- \$3,000

Covington

Playground Hip Shade

Project Amount - \$18,738.68

Request \$3,000 matching grant funds to support the installation of a new hip shade over their existing playground equipment. Currently, with the summer heat and sun, the playground becomes too hot and deters families from taking advantage of the amenity. This project will help keep the playground cool, safe and usable during the summer months and will benefit the Covington community.

Funding Request- \$3,000

Hampden Village

Playground Expansion

Project Amount - \$8,690

Request \$3,000 in matching grant funds to support Hampden Village in their playground expansion project. They plan to add two benches, a three-belt swing set, a tot swing, and a fitness structure to their small, already existing playground. This request would address Hampden Village's need for more space for the neighborhood's children to safely play outdoors.

Funding Request- \$3,000

Residents of Historic Concord

DogiPots

Project Amount - \$1,937.90

Request \$970 in matching grant funds to support the installation of DogiPot stations outside of public right-of-way areas on South Union Street. These stations would benefit the neighborhood by being placed in highly trafficked areas and will help prevent storm water contamination through proper disposal of pet waste. The stations will be installed and maintained by neighborhood volunteers and dues from the Residents of Historic Concord will help cover future material costs.

Funding Request- \$970

Christenbury

Sidewalk Lighting Safety Project

Project Amount - \$6,123.11

Request \$3,000 matching grant funds to support the purchase and installation of 28 LEFD accent lights to complete the Sidewalk Lighting Safety Project. The lights will add visibility down Camden Town Road, the main entrance of the community where residents often walk during summer nights to the neighborhood clubhouse, playground, basketball and tennis courts.

Funding Request- \$3,000

Lanstone

Heritage Tree Planting

Project Amount – \$3,876.16

Request \$2,450 in matching grant funds to support the Heritage Tree Planting project. Lanstone home owners would like to purchase and install trees and/or shrubs in a common area of their neighborhood as part of a community project. The project would help beautify the neighborhood and create a natural screen between Lanstone and neighboring communities.

Funding Request- \$2,450

Hidden Pond

Front Entrance Beautification

Project Amount - \$6,000

Request \$3,000 in matching grant funds to work with landscaper to reduce the size of the beds in their front entrance and upgrade their shrubbery by adding new low maintenance plants. This change will benefit the neighborhood by reducing maintenance costs and water usage.

Funding Request- \$3,000

**Highland Creek
Entry Renovation**

Project Amount – \$13,242

Request \$3,000 in matching grant funds for the Entry Renovation project at Highland Creek. The project would involve planting trees and installing LED lights at the main Concord-facing entrance of the neighborhood as well as landscaping work and additional tree planting around the popular amenities area of the neighborhood. The lighting project specifically will use energy saving bulbs which will save money for the neighborhood and will better accent the entrances to the community.

Funding Request- \$3,000

**Ramsgate
Barrier Fencing**

Project Amount – \$6,180

Request \$2,900 in matching grant funds to support the Barrier Fencing project in the Ramsgate neighborhood. This project would improve safety for neighbors and pedestrians at the roundabout at the end of Manston Place where there is a sharp drop off. The project would provide protection for anyone walking that portion of the road for greater enjoyment.

Funding Request- \$2,900

**Moss Creek
Decorative Street Posts**

Project Amount – \$7,451.65

Request \$2,850 in matching grant funds to support the replacement of existing steel street posts in Moss Creek Village with black decorative street posts. The decorative posts will improve the first impression visitors have when visiting the neighborhood and will help beautify highly trafficked areas of the community, making for a more inviting place to live and increased pride of ownership among residents.

Funding Request- \$2,850

**Bedford Farms
Nature Walking Trail**

Project Amount – \$10,500

Request \$2,825 in matching grant funds to support the Bedford Farms Nature Walking Trail. The goal of this project is to establish a nature walking trail in the common area of the Bedford Farms and connect different parts of the neighborhood. The trail project includes plans for gravel along the path, solar LED lighting, benches, and a bridge to cover a small lake within the trail.

Funding Request- \$2,825

PROJECTS NOT RECOMMENDED FOR FUNDING

Residents of Historic Concord

Walking Tour

Project Amount – \$8,530

Request \$3,000 in matching grant funds to support a Historic Concord Walking Trail on Friday and Saturday nights for the month of September. Participating residents would illuminate their homes and businesses with color flood-lighting. Pedestrians would navigate North and South Union Street by paper or digital guide maps with information about the home or business accessible through QR codes in each residence.

Funding would pay for 2-4 flood lights for each private residence or business; the grant funding would be used on private property rather than public, common areas of the neighborhood. The NMG policy states, “projects that occur on personal property are not eligible for funding”.

Funding Request- \$3,000

Oakleaf Condominiums

Safety Upgrades

Project Amount – \$1,800

Request \$3,000 in matching grant funds to support the safety upgrade to a pathway in the community that has eroded and is a safety concern for residents. The project would involve rebuilding the steps in the pathway, adding new gravel, and installing a hand rail along one side of the new steps.

The grant review committee determined this is a maintenance project that is the responsibility of the condominium management. NMG policy limits the use of grant funds for “maintenance or repair projects that are the regular responsibility of the Homeowners, Property Owners, or Neighborhood Associations”.

Funding Request- \$900

Glen Grove

Safety Upgrades

Project Amount – \$3,000

Request \$1,500 in matching grant funds to support the ongoing renovation of the pool bathrooms located inside the pool clubhouse. The bathrooms need to be updated after 14 years of usage without any improvements. As part of the project the bathrooms have received replacement toilet paper holders, a new toilet seat, and have been recently painted. With the grant funds the Glen Grove would install new sink faucets, replace rusted hardware, install industrial grade fans, and have the epoxy floors cleaned and waxed.

The grant review committee determined this is a maintenance project that is the responsibility of the Home Owners Association. NMG policy limits the use of grant funds for “maintenance or repair projects that are the regular responsibility of the Homeowners, Property Owners, or Neighborhood Associations”.

Funding Request- \$900

**Sapphire Hills
Erosion Restoration**

Project Amount – \$6,500

Request \$3,000 in matching grant funds to support the Erosion Restoration project. The goal of the project is to shore up an area behind two homes that back into a hill and are slowly losing ground. This erosion issue has been a result from decisions made by the builder and contractor.

The grant review committee determined this is a maintenance project that is the responsibility of the homeowners. NMG policy limits the use of grant funds for “maintenance or repair projects that are the regular responsibility of the Homeowners, Property Owners, or Neighborhood Associations”. The NMG policy also states, “projects that occur on personal property are not eligible for funding”.

Funding Request- \$3,000

June 18, 2021

Ms. Susan Sessler
Building and Grounds Director
City of Concord
P.O. Box 308
Concord, North Carolina 28025

Ref.: Sale of One (1) Surplus Generator Bid

Dear Susan:

The City received sealed offers on June 17, 2021, from four vendors for the purchase of the backup generator, located near City Hall and the Police Station in Concord. A bid tabulation is attached.

Each bid was reviewed for compliance with considerations for exceptions. Based on the preceding factors the highest and most compliant proposal was submitted by LEL international, from Duncan, South Carolina, in the amount of \$65,300.

Based on the information above, we recommend that the City award this purchase to LEL International, Inc. and authorize us to process the construction contracts.

Please let us know if you need any additional information or have any questions.

Very truly yours,

SOUTHEASTERN CONSULTING ENGINEERS, INC.

By  _____
Steve Phillips, Associate Engineer

SRP/lc
Enclosure()

BID TABULATION

Sale of One (1) Surplus Generator - Concord, NC

Bid No. 2489

City of Concord
Concord, North Carolina

Date: Thursday, June 17, 2021

Time: 2:00 PM, EDT

Description:

-(1) 1250 kW, Cummins-Model: DFCL-5738844

-Includes attached 4,200 gallon fuel tank (bottom-mounted)

	<u>Data Center Power Equipment 6640 N. government Way, Suite H Dalton Gardens, ID 83815</u>	<u>LEL International 1700 Victor Hill Rd Duncan, SC 29334</u>	<u>D.H. Griffin Wrecking Co 4716 Hilltop Rd Greensboro, NC 27407</u>	<u>Green Industrial 281 Commerce Street Belgium, WI 53004</u>
Bidder:				
Amount:	\$ <u>32,000.00</u>	<u>65,300.00</u>	<u>48,950.00</u>	<u>59,051.00</u>
Total Price	\$ <u><u>32,000.00</u></u>	<u><u>65,300.00</u></u>	<u><u>48,950.00</u></u>	<u><u>59,051.00</u></u>

ORD. #

AN ORDINANCE TO AMEND FY 2021-2022 BUDGET ORDINANCE

WHEREAS, the City Council of the City of Concord, North Carolina did on the 10th day of June, 2021, adopt a City budget for the fiscal year beginning July 1, 2021 and ending on June 30, 2022, as amended; and

WHEREAS, it is appropriate to amend the expense/expenditures and the revenue accounts in the funds listed for the reason stated;

NOW, THEREFORE, BE IT ORDAINED by the City Council of the City of Concord that in accordance with the authority contained in G.S. 159-15, the following accounts are hereby amended as follows:

Account	Title	Revenues		(Decrease) Increase
		Current Budget	Amended Budget	
620-4406000	Retained Earnings Appr	1,549,118	3,449,118	1,900,000
	Total			1,900,000

Account	Title	Expenses/Expenditures		(Decrease) Increase
		Current Budget	Amended Budget	
7340-5987000	Transfer to Project Fund	1,556,859	3,456,859	1,900,000
	Total			1,900,000

Reason: Appropriate retained earnings to cover additional funds needed for AMI project.

Adopted this 8th day of July, 2021.

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

William C. Dusch, Mayor

ATTEST: _____
Kim Deason, City Clerk

VaLerie Kolczynski, City Attorney

CAPITAL PROJECT ORDINANCE

Water Projects

BE IT ORDAINED by the City Council of the City of Concord, North Carolina that pursuant to Section 13.2 Chapter 159 of the General Statutes of North Carolina, the following project ordinance is hereby ordained:

SECTION 1. The projects authorized and amended are Water Projects-Smart Grid.

SECTION 2. The City Manager is hereby authorized to proceed with the implementation and amendments of the projects within the terms of the plans and specifications for the projects.

SECTION 3. The following revenues/expenditures are anticipated to be available to the City of Concord for the project:

Account	Title	Current Budget	Amended Budget	(Decrease) Increase
8700-5801134				
8700-5801134	Smart Grid	\$7,615,000	\$9,515,000	\$1,900,000
429-4501620				
429-4501620	From Water Fund	\$35,123,981	\$37,023,981	\$1,900,000

SECTION 4. Accounting records are to be maintained by the Finance Department of the City of Concord in such manner as (1) to provide all information required by the grant agreement and other agreements executed or to be executed with the various parties involved with the project; and (2) to comply with the Local Government Budget and Fiscal Control Act of the State of North Carolina.

SECTION 5. Within five (5) days after adopted, copies of this grant project amendment shall be filed with the City Manager, Finance Director, and City Clerk for direction in carrying out this project.

SECTION 6. The Finance Director is directed to report on the financial status of this project in accordance with the existing City policy. She shall also report to the City Manager any unusual occurrences.

Duly adopted by the City Council of the City of Concord, North Carolina this 8th day of July, 2021.

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

William C. Dusch, Mayor

ATTEST: _____
Kim Deason, City Clerk

VaLerie Kolczynski, City Attorney

RESOLUTION AUTHORIZING NEGOTIATED PURCHASE
OR EMINENT DOMAIN TO ACQUIRE PROPERTY

WHEREAS, the City Council for the City of Concord, North Carolina, hereby determines that it is necessary and in the public interest to acquire the property interest identified and defined, as follows:

Property Description: (Old Description)

LYING and being in Ward No. 4 (4) of the City of Concord, on the West side of South Georgia Avenue and being Lot No. 9 in Block "B" of LIBERTY VIEW, as surveyed and platted by Reece I. Long, a copy of which plat is filed in the Office of the Register of Deeds for Cabarrus County;

BEGINNING at an iron stake on the West side of South Georgia Avenue, a corner of Lot No. 8 and runs thence with the line of Lot No. 8, S. 87.5 W. 120 feet to an iron stake, a corner of Lots Nos. 8, 16, and 17; thence with the back line of Lot No. 16, S. 2.5 E 50 feet to an iron stake, a corner of Lots No. 16, 15, and 10; thence with the line of Lot No. 10, N. 87.5 E. 120 feet to an iron stake in the West edge of South Georgia Avenue, a corner of Lot No. 10; thence with the West edge of South Georgia Avenue, N. 2.5 W. 50 feet to the BEGINNING, AND IS THE LOT CONVEYED TO Viola Foster by A.F. Hartsell by deed dated December 18, 1925 and recorded in Deed Book 108, Page 196, Cabarrus County Registry.

BEING the same property conveyed by Viola Foster Davis to Emmanuel Reid and wife, Fannie Marie Reid by deed recorded in Deed Book 278, Page 79, Cabarrus County Registry. Parcel ID No: 5620-84-5253

WHEREAS, the fee simple acquisition of PIN 5620-84-5253 is currently owned by Calvin Lewis Reid and All Heirs Known and Unknown of Fannie Marie Reid and is being acquired for the purpose of construction of affordable housing; and

WHEREAS, representatives of the City of Concord are in negotiation with the above stated owners to acquire the above-described properties by negotiated conveyance.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF CONCORD, THAT:

The City of Concord will acquire by condemnation or negotiated conveyances for the purposes stated above the property and interest therein described above to the Resolution.

The City Attorney is authorized and directed to acquire by negotiated offer or, in the alternative, institute the necessary proceedings under Chapter 40A of the North Carolina General Statutes, to acquire the properties described above.

Adopted this _____ day of July, 2021.

ATTEST:

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

By: _____
Kim J. Deason, City Clerk

By: _____
William "Bill" Dusch, Mayor

[SEAL]

RESOLUTION AUTHORIZING NEGOTIATED PURCHASE
OR EMINENT DOMAIN TO ACQUIRE PROPERTY

WHEREAS, the City Council for the City of Concord, North Carolina, hereby determines that it is necessary and in the public interest to acquire the property interest identified and defined, as follows:

Property Description: (Old Description)

LYING and being in Ward No. 4 of the City of Concord, NC on the West side of Mahan Street, and being Lot No. 3 in Block "A" in the subdivision of HILTON as surveyed and platted by Quint E. Smith in 1906, said map being duly filed in the Office of the Register of Deeds for Cabarrus County, NC in Map Book No. 1, at Page 11 and described as follows:

BEGINNING at an iron stake in the Northwest intersection of Mahan Street and Branch Streets, and running thence with the Northern edge of Branch Street, S. 84.5 W. 115 feet to an iron stake, the Southeast corner of Lot No. 4; thence with the East line of said Lot No. 4, N. ¼ W. 50 feet to an iron stake, corner of Lots Nos. 2 and 3; thence with the dividing line of Lots Nos. 2 and 3, N. 84.5 E. 116.5 feet to a stake in the West side of Mahan Street; thence with the West side of Mahan Street, S/ ¼ W. 50 feet to the BEGINNING and is the land conveyed by Robert Lee Honeycutt and other to James Henry Hasty and wife, Minnie Hill Hasty by deed dated November 19, 1946, recorded in Deed Book 183, at Page 286, Cabarrus County Registry.

BEING the same property conveyed by Preston O. Baucom and wife, Frances H. Baucom to Sampson Garvin and wife, Lillie W. Garvin by deed recorded in Deed Book 239, Page 12, Cabarrus County Registry. Parcel ID No: 5620-94-0913

WHEREAS, the fee simple acquisition of PIN 5620-94-0913 is currently owned by the following: Lillie Garvin Barrett, All Heirs Known and Unknown of Huey H. (Henry) Garvin, Sadie Gavin (Garvin) Thompson, All Heirs Known and Unknown of Samuel L. Garvin, and All Heirs Known and Unknown of Lenell (Lonell) Garvin and is being acquired for the purpose of the construction of affordable housing; and

WHEREAS, representatives of the City of Concord are in negotiation with the above stated owners to acquire the above-described properties by negotiated conveyance.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF CONCORD, THAT:

The City of Concord will acquire by condemnation or negotiated conveyances for the purposes stated above the property and interest therein described above to the Resolution.

The City Attorney is authorized and directed to acquire by negotiated offer or, in the alternative, institute the necessary proceedings under Chapter 40A of the North Carolina General Statutes, to acquire the properties described above.

Adopted this _____ day of July, 2021.

ATTEST:

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

By: _____
Kim J. Deason, City Clerk

By: _____
William "Bill" Dusch, Mayor

[SEAL]

RESOLUTION AUTHORIZING NEGOTIATED PURCHASE
OR EMINENT DOMAIN TO ACQUIRE PROPERTY

WHEREAS, the City Council for the City of Concord, North Carolina, hereby determines that it is necessary and in the public interest to acquire the property interest identified and defined, as follows:

Property Description: (Old Description)

BEING Lot No. 14 as shown on Map 6, CANNON HOLDING CORPORATION, a map of said property being on file in the Office of the Register of Deeds in Map Book 19, at Page 58 and being known as 23 Powder Street, Concord, North Carolina.

BEING the same property conveyed by James Scott Newell and wife, Laurie M. Newell to Misty Shea Newell by deed recorded in Deed Book 4409, Page 56, Cabarrus County Registry. Parcel ID No: 5620-55-9784

WHEREAS, the fee simple acquisition of PIN 5620-55-9784 is currently owned by the following Misty Shea Newell and Stewardship-Bridgepoint Group and is being acquired for the purpose of the construction of affordable housing; and

WHEREAS, representatives of the City of Concord are in negotiation with the above stated owners to acquire the above-described properties by negotiated conveyance.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF CONCORD, THAT:

The City of Concord will acquire by condemnation or negotiated conveyances for the purposes stated above the property and interest therein described above to the Resolution.

The City Attorney is authorized and directed to acquire by negotiated offer or, in the alternative, institute the necessary proceedings under Chapter 40A of the North Carolina General Statutes, to acquire the properties described above.

Adopted this _____ day of July, 2021.

ATTEST:

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

By: _____
Kim J. Deason, City Clerk

By: _____
William "Bill" Dusch, Mayor

[SEAL]

RESOLUTION AUTHORIZING NEGOTIATED PURCHASE
OR EMINENT DOMAIN TO ACQUIRE PROPERTY

WHEREAS, the City Council for the City of Concord, North Carolina, hereby determines that it is necessary and in the public interest to acquire the property interest identified and defined, as follows:

Property Description: (Old Description)

LYING and being in Ward No. 4 (4) of the City of Concord, Cabarrus County, North Carolina and being all of Lots 72 and 73 of ANNEVA TERRACE, a map of which is recorded in the Office of the Register of Deeds for Cabarrus County in Map Book 7, at Page 65, to which plat reference is hereby made for a more complete and accurate description of subject property.

BEING the same property conveyed by Cline Investment Company of Concord, Inc. to James Isaac Long and wife, Elizabeth G. Long by deed recorded in Deed Book 604, Page 240, Cabarrus County Registry. Parcel ID No: 5620-73-3078

WHEREAS, the fee simple acquisition of PIN 5620-73-3078 is currently owned by All Heirs Known and Unknown of James Isaac Long and Elizabeth G. Long and is being acquired for the expansion of the McEachern Greenway; and

WHEREAS, representatives of the City of Concord are in negotiation with the above stated owners to acquire the above-described properties by negotiated conveyance.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF CONCORD, THAT:

The City of Concord will acquire by condemnation or negotiated conveyances for the purposes stated above the property and interest therein described above to the Resolution.

The City Attorney is authorized and directed to acquire by negotiated offer or, in the alternative, institute the necessary proceedings under Chapter 40A of the North Carolina General Statutes, to acquire the properties described above.

Adopted this _____ day of July, 2021.

ATTEST:

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

By: _____
Kim J. Deason, City Clerk

By: _____
William "Bill" Dusch, Mayor

[SEAL]

Drawn By:

Drew Melville, Esquire
Melville Law, P.A.
101 NE 3rd Avenue, Suite 1500
Fort Lauderdale, Florida 33301

Return to: City of Concord, ROD Box

STATE OF NORTH CAROLINA
COUNTY OF CABARRUS

PIN # 56209713710000
Grant of Permanent Easement to
CITY OF CONCORD

The undersigned Grantor, CABARRUS COUNTY, NORTH CAROLINA, a public body corporate and politic, in consideration of payment to the Grantor of the sum of One Dollar, (\$1.00), the receipt and sufficiency of which is hereby acknowledged, does/do hereby grant, bargain, sell and release unto the City of Concord, a North Carolina municipal corporation ("Grantee"), its successors, assigns and licenses, the right, privilege, and easement to enter and re-enter at any time and to install, dig, build, erect, maintain, repair, rebuild, operate, and patrol one or more public utilities, over ground or underground, including but not limited to sanitary sewer and water infrastructure, underground pipes, other utility lines, any and all related fixtures or appurtenances; the right to clear the easement area and keep it clear of brushes, trees, buildings, obstructions, and fire hazards; and the right to remove trees, if any, located beyond the limits of the easement area, but also which interfere with the utility easements or the easement area; the above described rights being incident to performance by the Grantee of its functions as a municipality or as the operator of a public utilities system, or the performance by any contractor, agent or licensee of the Grantee of any public utilities functions, the premises to be affected hereby being more particularly described as follows:

A variable width permanent utility easement area (the "Easement Area") as depicted and legally described on Exhibit "A" attached and incorporated into this easement.

The Grantor, by the execution of this instrument acknowledges the plans for the above referenced project as it affects the remaining property have been fully explained to Grantor or Grantor's authorized representative(s), and does hereby release the Grantee, its successors, and assigns from any and all claims for damages resulting from the construction of said project or from the past, present or future use of the Easement Area for any purpose for which the said Grantee is authorized by law to subject the same.

Together with any and all rights normally incident thereto, and particularly the right of ingress and egress to the Easement Area from time to time as necessary for construction, reconstruction, enlargement and/or maintenance related to the utility infrastructure located within the Easement Area.

To have and to hold the same unto the City of Concord, its successors and assigns forever.

This agreement shall not be interpreted to impose any duty on the City of Concord, its successors and assigns to install any utilities by any particular date or within any particular time frame.

This property right may be assigned by the Grantee, or its successors.

The Grantor shall have the right to use the above-described easement area for purposes not inconsistent with Grantees' full enjoyment of the rights hereby granted, provided that the Grantor shall not erect or construct any

building or other structure thereon; maintain or permit any underground or over ground system of piping, poles or wiring within such strip; make any use of the facilities installed, buried, erected, or constructed thereon; or drill or operate any well or septic system within such strip, without the express written permission of the Grantee.

IN WITNESS WHEREOF, Grantor has caused this instrument to be executed in its name by its proper officers thereunto duly authorized on the day and year first above written.

GRANTOR:

CABARRUS COUNTY, NORTH CAROLINA
[SEAL]

Name:
Title:

ATTEST:

Name:

Approved as to form:

Name:

STATE OF NORTH CAROLINA
COUNTY OF CABARRUS

I, _____, a Notary Public of the State and County aforesaid, certify that _____ personally came before me this day and acknowledged under seal that she is _____ of the Cabarrus County, and that by authority duly given and as the act of the Council, the foregoing instrument was signed in its name by its _____, sealed with its corporate seal and attested by herself as its _____.

WITNESS my hand and official seal, this ____ day of _____, 2020.

Notary Public
My commission expires:

IN WITNESS WHEREOF these presents have been duly executed under seal by the Grantor on this _____ day of _____, 2021.

GRANTEE

By:

: _____, President

By: _____, Vice President

By: _____, Secretary

STATE OF NORTH CAROLINA
COUNTY OF _____

CORPORATE NOTARY

I, _____, a Notary Public of the County of _____, State of North Carolina, certify that _____, _____, and _____, (Names of Signatories) personally came before me this day and acknowledged that they are the _____ (Titles) of _____ (Grantor), a North Carolina Corporation, and that by the authority duly given and as the act of such entity, they signed the foregoing instrument in its name and on its behalf as its act and deed.

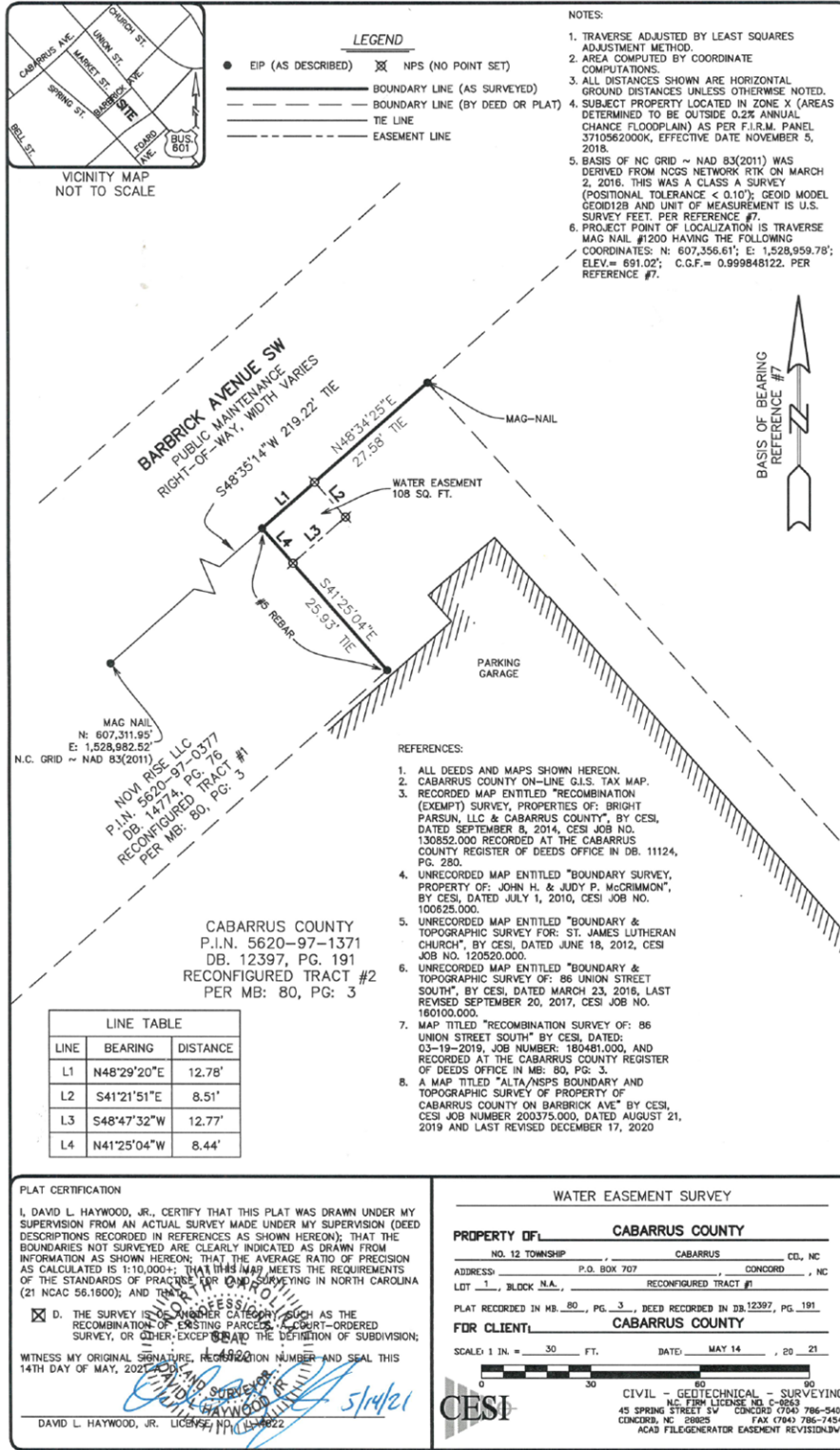
Witness my hand and notary seal or stamp, this the _____ Day of _____, 2015.

[SEAL]

Notary Public

My Commission Expires: _____

EXHIBIT "A" - EASEMENT AREA



LEGAL DESCRIPTION

WATER EASEMENT

ALL OF THAT REAL PROPERTY IN #12 TOWNSHIP, CITY OF CONCORD, CABARRUS COUNTY, NORTH CAROLINA, BEING A PORTION OF DEED BOOK 12397 PAGE 191, LYING SOUTH OF BARBRICK AVENUE SW AND NORTH OF SPRING ST. SW, AND MORE PARTICULARLY DESCRIBED AS FOLLOWS:

BEGINNING AT A MAG NAIL IN SIDEWALK AT THE INTERSECTION OF THE SOUTHEASTERLY LINE OF BARBRICK AVENUE SW, AND THE NORTHEASTERLY LINE OF SPRING STREET SW, AND ALSO BEING THE MOST WESTERLY CORNER OF TRACT #1 (MB: 80, PG: 3; CABARRUS COUNTY REGISTER OF DEEDS); HAVING A NC GRID-NAD 83 (2011) COORDINATES OF N= 607,311.95 FEET, E= 1,528,982.52 FEET, THENCE N 48° 35' 14" E 219.22 FEET, TO A NUMBER 5 REBAR, BEING THE **TRUE POINT OF BEGINNING**;

THENCE N 48° 29' 20" E, AND PARALLEL WITH THE NORTHERN MOST LINE OF DEED BOOK 12397 PAGE 191, AND SHOWN AS THE RECONFIGURED TRACT #2 IN A MAP RECORDED WITH THE CABARRUS COUNTY REGISTER OF DEEDS IN MAP BOOK 80 PAGE 03, A DISTANCE OF 12.78 FEET, TO A COMPUTED POINT;

THENCE THE FOLLOWING TWO CALLS: (1) S 41° 21' 51" E 8.51 FEET, TO A COMPUTED POINT; (2) S48°47'32"W 12.77 FEET, TO A COMPUTED POINT ON LINE WITH DEED BOOK 12397 PAGE 191, BEING N41°25'04W 25.93 FEET FROM A NUMBER 5 REBAR;

THENCE N 41° 25' 04" W, ALONG THE LINE OF SAID DEED BOOK 12397 PAGE 191, A DISTANCE OF 8.44 FEET, TO THE **TRUE POINT OF BEGINNING**.

THE ABOVE DESCRIBED EASEMENT CONTAINS 108 SQUARE FEET.

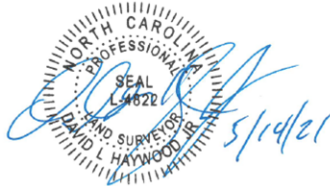


Exhibit A



STATE OF NORTH CAROLINA

COUNTY OF CABARRUS

GROUND LEASE AGREEMENT
(General Services Drive/Betsy Carpenter Place)
PIN 5539-34-7439

This GROUND LEASE AGREEMENT (“Lease”) is made and entered into as of the day of May, 2021, by and between the CITY OF CONCORD (“City”), as Lessor and CABARRUS COUNTY (“County”), as Lessee.

RECITALS

1. The City owns real property on General Services Drive and Betsy Carpenter Place on which the County has constructed multiple structures on the parcel. Current uses include an animal shelter, a whitegoods storage facility, a fleet building, a household hazardous waste facility and an IAM building and it is acknowledged that such uses may change in accordance with the County’s needs.

2. On January 10, 1997, the City and County entered into a Ground Lease Agreement, under which the City leased to the County the above-referenced real property, in order to allow the County to construct the above-referenced improvements.

3. Under Article III of such ground lease, the lease term expires on January 31, 2022, but contains three (3) options to extend the lease for a total of twenty-five (25) additional years.

4. The rent due the City under such lease was One Dollar (\$1.00) for the entire term of the lease, which rent has previously been paid to the City by the County.

5. The City and the County desire to update and modify the existing Ground Lease Agreement to reflect the present circumstances between the two regarding this property and to reflect intended plans regarding the property.

6. This interlocal agreement is authorized by N.C. Gen. Stat. § 160A-460.

In consideration of the above Recitals and the Terms contained below, which the parties agree make this Lease legally binding and enforceable, the City and County agree as follows.

TERMS

1. DEMISE OF PREMISES. Upon the terms and conditions of this Lease, the City does lease, let and demise to the County, and the County does lease from the City the “Premises”. The Premises consists of that part of PIN 5539-34-7439, which includes the “Land” and the “Buildings” that are outlined in purple in the attached Exhibit A.

2. HABENDUM. To have and hold the Premises to the County upon these terms and conditions.

3. TERM. The Term of this Lease shall begin on the 31st day of January, 2022 and shall end at 12:00 midnight on the 30th day of January, 2047. There are no extensions of the Term.

4. RENT. The Rent which the City hereby charges and which the County shall pay to the City for the leasing of the Premises shall be One Dollar (\$1.00); and the Rent shall be paid in

a single payment of One Dollar (\$1.00) which payment shall be due and payable on the date of the execution of this Lease by the County or within thirty (30) days thereafter.

5. DEFAULT. The occurrence of one or more of the following events (referred to as “Events of Default”) shall constitute default:

(A) Failure to pay Rent or any other sum due City by County when such amount is due;
or

(B) Failure to perform any other provision of this Lease if the failure to perform is not cured within thirty (30) days after written notice has been given by the non-defaulting party to the defaulting party.

6. REMEDIES UPON DEFAULT. Upon occurrence of an Event of Default, the non-defaulting party may pursue any remedy of available at law, by equity or pursuant to this Lease, including, without limitation, the initiation of a suit at law of equity to enforce the obligations of the defaulting parties. No waiver of any Event of Default shall affect any subsequent Event of Default or shall impair any rights or remedies consequent on said subsequent Event of Default. The failure of the non-defaulting party to insist at any time upon the strict performance of any covenant or agreement or to exercise any option, right, power, or remedy contained in this Lease shall not be construed as a waiver or a relinquishment for the future. No delay or omission of the non-defaulting party to exercise any right or power accruing upon any Event of Default shall impair any such right or power shall be construed to be a waiver of any such Event of Default or any acquiescence to it.

7. END OF TERM AND HOLDING OVER. Upon the expiration of the Term or other termination of this Lease, County shall quit and surrender to City the Premises, broom clean, in good order and condition, ordinary wear and tear excepted and County shall remove from the Premises all of its personal property. If County shall hold over after the expiration of the Term or other termination of this Lease, such holding over shall not be deemed to be renewal of this Lease but shall be deemed to create a tenancy-at-will and by such holding over, County shall be deemed to have agreed to be bound by all of the terms and conditions of this Lease except those as to the Term. Any Buildings or other structures constructed by the County on the Premises shall be subject to a separate agreement between the City and the County for purchase by the City from the County. Should the City not wish to purchase such Buildings and structures, the County at its options may either abandon or demolish the same.

8. ASSIGNMENT AND SUBLETTING. County shall not assign this Lease or sublet the Premises or any part without the prior written consent of City. Consent by City to one assignment or subletting shall not operate as a waiver as to future assignments or subleases.

9. ALTERATIONS BY COUNTY. County shall be in entitled to make alterations, additions or improvements to the Premises only with the prior consent of City, which consent shall not be unreasonably or untimely withheld. All alterations, additions and improvements made by, for or at the direction of County shall remain the property of the County and shall remain upon and be surrendered with the Premises in accordance with Paragraph 7, above at the expiration or earlier termination of this Lease. County shall promptly pay and discharge any and all licensees, imposts, liens or other charges arising out of or in connection with the performance of any act required of or permitted by County and shall keep the Premises free and clear from any and all such liens or charges.

10. REPAIRS AND MAINTENANCE; PROPERTY OF COUNTY. County shall at

its expense, throughout the Term of this Lease, maintain in good order and repair the Premises, including, but not limited to the interior and exterior walls and finishes, the roof, all doors and all plate glass, any heating and air conditioning systems, plumbing and wiring, and all other systems both inside the Buildings and outside, including landscaping and other repairs as may be necessary to maintain the Premises in the condition in which it was received at the commencement of this Lease, reasonable wear and tear and damage by casualty excepted.

11. CITY'S RIGHT OF ENTRY. City shall have the right to enter the Premises at any time and for such lengths of time as City shall deem reasonable to inspect the Premises.

12. COVENANT OF QUIET ENJOYMENT. The City covenants and agrees with the County that, so long as the County materially keeps and performs all of the covenants and conditions by the County to be kept and performed, the County shall have quiet and undisturbed and continued possession of the Premises, free from any claims by the City and every person and entity claiming under, by, or through the City. The City shall not encumber the Premises or permit the Premises to be encumbered except as first consented to by the County.

13. INSURANCE AND INSURANCE RATES. Throughout the term of this Lease, County shall carry fire and extended coverage insurance insuring its and City's interest in the Premises and its interests in its furniture, equipment, supplies and other property and County shall carry public liability insurance insuring against all liability of City and County and its authorized representatives arising out of and in connection with County's use or occupancy of the Premises. Such coverage shall be in a minimum amount of \$1,000,000.00 for each insured event. County hereby waives any claim or right of action which it may have against City for any loss or damage covered by such insurance. City shall be named as an additional insured on such coverage.

14. NOTICES. Any notice or demand which by any provision of this Agreement is required or allowed to be given by either party to the other shall be deemed to have been sufficiently given for all purposes when made in writing and sent in the United States mail as certified or registered mail, return receipt requested, postage prepaid and addressed: (a) if to County, to County Manager, P.O. Box 707, Concord, NC 28026-0707, and (b) if to City, to City Manager, P.O. Box 308, Concord, NC 28026-0308.

15. INTEGRATION AND BINDING EFFECT. The entire agreement, intent and understanding between City and County is contained in the provisions of this Lease and any stipulations, promises or agreements, written or oral, made prior to or contemporaneously with this Lease shall have no legal or equitable effect or consequence unless reduced to writing and executed by the parties. This Lease shall be governed and construed pursuant to the laws of the State of North Carolina.

16. COMPLIANCE BY COUNTY WITH GOVERNMENTAL REGULATIONS. In the performance of any acts required of or permitted to County under Paragraph 9 or any other provision of this Lease, County shall obey and comply with all lawful requirements, rules, regulations, and ordinances of all legally constituted authorities, existing at any time during the continuance of such performance in any way affecting the Premises or the use of the Premises by County. Such compliance shall include compliance by County with all requirements of the Occupational Safety and Health Act and all environmental laws affecting the Premises, and all amendments thereto, as the same applies to the County's use of the Premises.

17. FORCE MAJEURE. If the City or the County is delayed in, hindered in, or prevented from the performance of any act required by this Lease by reason of strikes, lockouts, labor troubles, inability to procure materials, failure of power, restrictive government laws or regulations, riots, insurrection, war, or other reason beyond its control, then performance of such

act shall be excused for the period of the delay; and the period for the performance of any such act shall be extended for a period equivalent to the period of such delay, hindrance, or prevention as the case may be.

18. COVENANTS RUNNING WITH LAND. All covenants, promises, conditions, and obligations contained or implied by law are covenants running with the land and shall attach to the Premises and shall bind and inure to the benefit of the County and the City and their respective legal representatives, successors, and permitted assigns.

19. SEVERABILITY. In the event that any provision of this Lease is held invalid or unenforceable by any court of competent jurisdiction, such holding shall not invalidate or render unenforceable any other provision of this Lease.

IN WITNESS, the parties have duly executed this Lease Agreement as of the day and year first above written.

COUNTY:

Attest:

Lauren Linker
Clerk to the Board

By: _____
Stephen M. Morris
Chair, Board of Commissioners

CITY:

Attest:

City Clerk

By: _____
William Dusch
Mayor

This instrument has been pre-audited in the manner required by the “Local Government Budget and Fiscal Control Act.”

Wendi Heglar
Finance Director

This instrument has been pre-audited in the manner required by the “Local Government Budget and Fiscal Control Act.”

City Finance Director

RESOLUTION AUTHORIZING LEASE OF PROPERTY

WHEREAS, the City Council of the City of Concord and the County of Cabarrus wish to enter into a lease of real property described below; and

WHEREAS, General Statute 160A – 274 authorizes the City to lease real property to the County.

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Concord, that:

The City Council finds that the leased premises will not be needed by the City for the term of the lease; and

The City Manager and the City Attorney are hereby authorized to take all necessary steps and execute the necessary documents in order to affect the lease of the real property described below, and to deliver and receive the appropriate documents:

Being part of PIN 5539-34-7439 which includes 246 General Services Drive, 243 Betsy Carpenter Place and 244 Betsy Carpenter Place.

Adopted this _____ day of _____ 2021.

CITY COUNCIL
CITY OF CONCORD, NORTH CAROLINA

ATTEST:

Kim J. Deason, City Clerk

Bill Dusch, Mayor



Uniform Relocation Assistance Policy

**(For City-Funded, CDBG & HOME-
Eligible Projects)**

CITY OF CONCORD
Planning & Neighborhood Development Department
35 Cabarrus Avenue West
Concord, North Carolina 28025

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I. PURPOSE

The City of Concord's Planning & Neighborhood Development Department (P&NDD) administers both federally-funded and City-funded projects to provide decent, safe and affordable housing options for its residents. The purpose of this Policy is to provide guidance related to the assistance of tenants and owner-occupied households that are voluntarily, temporarily, or permanently relocated in response to a City-funded, CDBG-funded or HOME-funded housing project. The Policy also outlines the City's efforts to: (1) mitigate the impacts of displacement resulting from any required relocation activities; (2) determine the compensation allowance and the relocation assistance for each tenant or household that is affected; and (3) maintain ongoing communication and engagement with the tenants and households throughout the entire process.

II. DEFINITIONS OF FREQUENTLY USED TERMS

Affordable Housing: housing that can be purchased for no more than 2.5 to 3 times the total annual household income or housing that allows household costs (rent or mortgage plus utilities) not to exceed 30 percent of household gross income, as defined by the U.S. Department of Housing and Urban Development (HUD).

Applicable Housing Type and Geography: City-owned rental properties and owner-occupied, income-qualified residential homes that are located within the Concord city limits.

Area Median Income (AMI): the yearly metric that is calculated by HUD to determine the income eligibility requirements of the eligible households.

City Funds: any non-federal funds that are allocated by the City of Concord for the specific purpose of supporting affordable housing initiatives and are administered by the P&NDD, e.g., dedicated affordable housing funds, general funds, etc. These funds are controlled by the City and State statutes.

City-Funded Projects: projects that typically include City funds only, but also may be supplemented with federal funds.

Cost Burden: paying more than 30% of household income for housing costs (rent or mortgage, plus utilities). Households that pay more than 50% of household income for housing costs are severely-cost burdened.

Eligible Household: families that reside in City-owned rental properties or owner-occupied homes within the city limits that qualify for housing rehabilitation or reconstruction grant assistance through the City's federal CDBG and HOME programs.

Eligible Moving Costs: costs that the City will cover for tenants and households that are displaced due to housing-related City activities and projects. The City will not cover the costs of packing and unpacking residents' belongings, but once boxed, the City will cover the costs to move and unload the boxes to the temporary or permanent location. The City will obtain a minimum of two (2) bids on planned

rehabilitation repairs, reconstruction projects, and for moving costs . Additional details about the bidding process are available under the “Contractor Procurement” section on page 19.

Emergency Conditions: circumstances that require the City to provide accommodations for tenants or homeowners to be relocated until the repair or the replacement of the unit or property is completed.

Income: any source of monetary compensation that is received, especially on a regular basis, in the form of earned wages or salary, investment earnings, disability, retirement or Social Security income, alimony, child support, public assistance or from any other source.

Owner-Occupied Properties: homes that are owned by City residents that qualify for housing rehabilitation or housing reconstruction assistance through the City’s CDBG and HOME programs.

Period of Affordability: the period of time of the lien that is placed on a federally-funded property with a set amount that is included in the Deed of Trust, the Note and the Deed Restrictions. The minimum period of affordability for single-family reconstruction projects shall remain in force for a period of 20 years.

Project Costs: the total funds that are needed to complete the project or work, including direct and indirect costs, such as assistance provided by the contract; equipment that is purchased solely for project use; utilities for a building that is used solely for the project and no other service; and other direct project costs. For service contracts, projects costs are to be documented as follows:

- Repair costs – subcontractor invoices and receipts for materials.
- Equipment – purchase orders and documentation of expenses in the ledger, including documentation of 100% use by the project.
- Utilities – copies of bills paid for utilities.
- Documentation of 100% of construction costs through project completion.
- Documented proof that no other services are being provided within the building(s) except the services that were included in the initial written agreement.

Principal Residence: the home where the qualifying family resides at least nine (9) months out of the year.

System Vision Standards: design and construction standards that were created by Advanced Energy in conjunction with the North Carolina Housing Finance Agency. System Vision is an Advanced Energy program that provides training and technical support to improve the health, safety, durability, comfort, and energy efficiency of affordable homes in North Carolina.

III. The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and Section 104 (d)

The City of Concord’s CDBG and HOME-assisted projects are subject to the Uniform Relocation and Assistance and Real Property Acquisition Polices Act of 1970, as amended (URA) (42 U.S.C. 4601-4655), and the government-wide implementing regulations issued by the Federal Highway Administration at title 49 CFR part 24. In addition, projects that include demolition or conversion of low-income housing are subject to Section 104(d) (also called the Barney Frank amendment).

Acquisition

The URA requirements apply to any and all real property acquisition for a project that receives any amount of CDBG or HOME funding, regardless of whether the funds are used to purchase the property or for other project costs. The regulations may apply to any acquisition for which a purchase offer was made at any time after the date the applicant first *intended* to apply for HOME funds for the project.

The City is exempt from complying with most acquisition requirements of the Uniform Act (Subpart B) *only* if an identified site can be acquired “voluntarily” in accordance with Section 49 CFR § 24.101 of Subpart B.

A “voluntary” acquisition requires the buyer to inform the seller, prior to executing an agreement to purchase:

- That it does not have the power of eminent domain (buyers with eminent domain authority, must agree not to use it, and must not have specific site needs);
- That it will not be able to purchase the property if negotiations fail to result in an amicable agreement; and
- Of the buyer’s estimate of fair market value (FMV) of the property to be acquired.

Estimating Fair Market Value:

An appraisal is not required to establish the FMV of a property, but there must be documentation that includes an explanation, with reasonable evidence, of the basis for the estimate. A Comparative Market Analysis is acceptable for this purpose.

Section 104(d)

Section 104(d) of the Housing and Community Development Act of 1974, as amended (104(d)) requirements apply when CDBG or HOME assistance is used for a project involving demolition or conversion.

Section 104(d) has two distinct components:

- **One for One Replacement:** Requires one-for-one replacement of lower-income dwelling units that are demolished or converted to another use. For Section 104(d) purposes, “conversion” is defined as: Altering a housing unit that would rent at or below the fair market rent (FMR) so that it is used for non-housing purposes, rents for above the FMR or is used as an emergency shelter.
- **Relocation of Lower-Income Tenants:** Requires relocation assistance for displaced lower-income residential tenants and does not provide protection or assistance for persons with incomes above the Section 8, Low-Income Limit.

Housing Replacement

The City of Concord has adopted a “Residential Anti-Displacement and Relocation Assistance Plan”, which addresses the Section 104(d) requirement for one-for-one replacement of low- income housing units.

The City may replace all occupied and vacant occupiable low- and moderate- income dwelling units demolished or converted to a use other than as low- and moderate- income housing as a direct result of activities assisted with City funds, CDBG funds or HOME funds.

Replacement units do not need to be provided by the same fund recipient whose project resulted in the housing loss. The City will count any net gain in units achieved through the investment of City funds as having met the one-for-one replacement requirement.

Relocation

The City of Concord strongly discourages the permanent displacement of low-income households by projects and programs. The URA stipulates the content and timing of notices for residents of properties to be acquired with City funds, CDBG funds, or HOME funds. If residents will be displaced by the project, they must receive moving cost reimbursements, relocation assistance payments, and relocation assistance services. If an otherwise feasible and fundable project does necessitate permanent or temporary displacement and relocation, the relocation must be carried out in strict compliance with the URA. The City’s URA Policy will cover all applicable projects, regardless of the funding source.

Temporary Relocation

All conditions of temporary relocation must be reasonable and the tenant shall be reimbursed for all reasonable out-of-pocket expenses incurred in connection with the temporary relocation.

Tenants and owner-occupied households shall receive advisory services, including written notice of the date and approximate duration of the temporary relocation, address of the suitable temporary unit, and the terms and conditions under which the tenant may lease and occupy the building/complex upon completion of the project.

Temporary relocation may not extend beyond one year before the person is returned to his or her previous unit or location. Any residential tenant or owner-occupied household that has been temporarily relocated for more than one (1) year must be offered all permanent relocation assistance, which may not be reduced by the amount of any temporary relocation assistance previously provided.

If the project requires tenants to be temporarily relocated off site, a detailed **Temporary Relocation Plan** is required.

NOTE: If a project utilizes both City and HUD funds, HUD requirements will prevail. If a project has two (2) different forms of HUD funds, the most stringent requirements must be met. All City projects are subject to the discretion of the Concord City Council.

A. Targeted Households and the Selection Process

Target and Priority. The City’s Uniform Relocation Assistance Policy covers families that have been identified as earning a maximum of 80% or below of the AMI as the target population. The policy requires the City to provide financial compensation and additional support to tenants and residents that are required to leave their unit or home for more than one day as a result of a City project that requires relocation. If the tenants or residents are affected, financial compensation and additional assistance will be provided on a per household basis, where household is defined as one or more individuals who currently reside in the City-owned or owner-occupied properties. Additional support may be provided to tenants or residents that wish to relocate to alternate accommodations other than the housing options that are being offered by the City.

CDBG & HOME Funds. Under the CDBG & HOME funds, a homeowner must be below 80% of AMI at the time of relocation notification. In addition, the City will ensure that tenants and residents are properly guided through the relocation process by providing the following services:

- 1) **Mitigating the impacts of the relocation process.** The City will provide financial compensation and the option of additional support based on the household preferences of the tenant or resident (e.g., neighborhood preference, proximity to schools/work/healthcare, etc.) whenever possible.
- 2) **Prioritizing assistance for those who need it most.** The City will assist with identifying permanent affordable housing options for low-income tenants and residents and additional financial or other support will be provided to households that face other housing barriers, i.e., seniors, people with disabilities, people experiencing major health issues, etc.
- 3) **Maintaining ongoing communication and engagement.** The City will ensure that the tenants and residents will receive early information about the intent to complete a project that will result in the need for relocation. The tenants and residents also will receive regular updates throughout the entire process.

Moving Expenses. Moving expenses will be provided for relocation to permanent housing as well as relocation to and from any temporary accommodations for all City-sponsored and federally-funded housing projects.

- After the bid process is completed, an insured moving company will be provided to the tenants or residents and the moving costs will be covered.
- The City of Concord’s compensation payments for tenants and households are in alignment with the U.S. Department of Transportation’s Federal Highway Administration guidance. The Administration’s notice, that was effective as of August 24, 2015, establishes the amount of relocation assistance payments by rooms for each state. The rates for North Carolina are included below:

State	Occupant Owns Furniture									Occupant does not own furniture	
	Number of Rooms of Furniture								Addt'l room	1 room/ no furn.	Addt'l room no furn.
	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8 rooms			
NC	\$550	\$750	\$1,050	\$1,200	\$1,350	\$1,600	\$1,700	\$1,900	\$150	\$350	\$50

For more details concerning this payment schedule, please visit the Administration's website:

https://www.fhwa.dot.gov/real_estate/uniform_act/relocation/moving_cost_schedule.cfm

Selection Process. The City has outlined the requirements for both eligible households and eligible moving costs for the Uniform Relocation Assistance Policy in the Definitions of Frequently Used Terms section of this Manual on page 3. The Community Development Manager will answer any additional eligibility questions that are not addressed within the Definitions of Frequently Used Terms.

Eligible Uses. In addition to the City's CDBG and HOME funds, City funds may be used to support property acquisition or new construction projects. Infrastructure projects that support new construction development also may be an eligible use of City funds, but this determination will be made on a case-by-case basis by City staff when the City receives the project request.

B. Period of Affordability

The minimum Period of Affordability for single-family reconstruction projects shall remain in force for a period of 20 years. During the Period of Affordability, the period from the date of the owner's receipt of the Certificate of Occupancy of the property up to 20 years, the homeowner must use the home as the primary residence. In the case of a sale, transfer, or assignment of title of deed; the owner(s) fail to occupy the property as his/her principal residence; the property is used for rental purposes; or a cash out refinance of the property by the owner during the 20-year retention period; then the City shall receive a payment. The value of this payment will be determined by either; 1.) the difference of sales price and the appraised value as of the effective date of this document or; 2.) the value of the property as assessed by the Cabarrus County Tax Assessor's office at the time of sale, whichever is greater.

- a. In the case of a sale, transfer or assignment of the property, the subsequent purchaser, transferee, or assignee must be a low- to moderate-household as defined by HUD regulations and verified by the P&NDD;
- b. In the case of a non-cash out refinance, following the refinancing, the property continues to be subject to a deed restriction or other legally enforceable retention agreement or mechanism as described in this paragraph.

This stipulation shall automatically terminate in the event of transfer of title by foreclosure or by deed in lieu of foreclosure, subject to automatic revival if, at any time during the remainder of the original Period of Affordability, the owner of record immediately prior to the termination event, or any entity that includes such former owner or those with whom the former owner has or had family or business ties, obtains an ownership interest in the Property.

IV. OVERARCHING PROGRAM REGULATIONS AND REQUIREMENTS

A. Fair Housing and Civil Rights

The City of Concord will comply with federal, state, and local fair housing and civil rights laws, regulations, and Executive Orders, including Title VI of the Civil Rights Act of 1964, as amended (42 U.S.C. 2000d et seq); the Fair Housing Act (42 U.S.C. 3601-3602); Equal Opportunity in Housing (Executive Order 11063, as amended by Executive Order 12259); and the Age Discrimination Act of 1975, as amended (42 U.S.C. 6101-6107).

Discrimination in the provision of housing is prohibited on the basis of a protected class; federal and North Carolina State protected classes include:

- Race
- Color
- National Origin
- Religion
- Disability
- Sex
- Familial Status

B. Affirmative Marketing and Outreach

The City of Concord will undertake outreach efforts in accordance with state and federal fair-lending regulations to assure nondiscriminatory treatment, outreach, and access to housing opportunities.

The City will inform potential applicants of housing opportunities via flyers, public notices, local media articles, or meetings with Subrecipient staff. The marketing information will include basic eligibility requirements, a general description of the housing opportunities, and the appropriate Fair Housing logo.

The City's marketing approach will address: (1) how the information will be shared (i.e., which media and other sources); (2) where applications will be taken (i.e., at one site or more); (3) when applications will be accepted (i.e., daily, during normal working hours, or extended hours for a specified period); and (4) the method for taking applications (i.e., in person, by email, by mail, etc.).

The City must maintain a file that contains all marketing efforts (i.e., copies of newspaper ads, memos of phone calls, copies of letter, etc.) The records, which help assess the results of these actions. The City will work to assure that all marketing initiatives and materials adequately reflect the available assistance types.

The City also has an obligation to assure that information about the housing opportunities reaches the broadest possible range of potentially qualified applicants. To further fair housing objectives, the City should identify those households that have been determined to be "least likely to apply," and determine what special outreach activities, including placing advertising in minority-specific media, will ensure that this population is fully informed about the housing opportunities.

C. Conflict of Interest

In the procurement of property and services, the City of Concord will follow all applicable local, state, and federal procurement requirements when expending funds.

Any person who exercises or has exercised any functions or responsibilities with respect to activities assisted by the City's Affordable Housing funds or who are in a position to participate in a decision-making process or gain inside information with regard to these activities, may not have an interest in any contract or agreement with respect thereto, or the proceeds there under, either for themselves or those with whom they have family or business ties, during their tenure or for one year thereafter.

Conflict of interest provisions apply to any person who is an employee, agent, consultant, officer, board member, loan committee member, elected official or appointed official.

The City of Concord may provide an exception to the provisions listed above on a case-by-case basis when determined that the exception will serve to further the purposes of the City and the effective and efficient administration. For the City to provide this exception, a written request will be required to make a determination based on the following factors:

- a. Whether the person receiving the benefit is a member of a group or class of low-income persons intended to be the beneficiaries of the assisted housing, and the exception will permit such person to receive generally the same interests or benefits as are being made available or provided to the group;
- b. Whether the person has withdrawn from his or her functions or responsibilities, or the decision-making process with respect to the specific assisted housing in question;
- c. Any other factor relevant to the City, including the timing of the requested exception.

Gifts and Gratuities and Discounts. Employees shall not accept gifts, or loans from vendors, or from any organizations, business firms, or individuals with whom they have official relationships because of City Government business. These limitations do not prohibit the acceptance of articles of negligible value, which are distributed generally, do not prohibit employees from accepting social courtesies that promote good public relations, and do not prohibit employees from obtaining loans from public lending institutions. This restriction applies to all City employees, and elected officials, and it is particularly important that inspectors, contracting officers, and enforcement officers guard against relationships that might be construed as evidence of favoritism, coercion, unfair advantage, or collusion. Any vendor found to have offered or engaged in unacceptable gifts or loans to any person covered by this section shall be ineligible for City business for a period of three (3) years.

Good vendor relations are valuable business assets, established through mutual confidence, fair dealing and professional interaction between buyer and seller. An important contribution toward promoting and preserving these relations is a clear understanding of the methods of contact and the contractual process between the buyer and seller.

Vendor relations shall be controlled at all times by:

- Open and fair competition
- Truthfulness in all transactions
- Observance of any confidential information
- Professional respect

D. Program Accessibility

All program activities, including public hearings, homebuyer briefings, counseling sessions, and meetings should be held in locations that are accessible to persons with disabilities.

Information about all programs and activities should be disseminated in a manner that is accessible to persons with disabilities. Auxiliary aids and special communication systems should be used for program outreach, public hearings related to housing programs, and other program activities.

Reasonable steps should be taken to provide information about available accessible units to eligible persons with disabilities. Homebuyer projects are not required to produce accessible units but reasonable accommodations during the application process are required for any buyers with accessibility needs. Program advertising should acknowledge that the program will work with households with accessibility needs. Should a successful homebuyer applicant have a need for a unit with an accessible design, the program must accommodate those needs.

E. Equal Opportunity

The City of Concord will try, to the greatest extent feasible, to comply with the following:

- **Section 3 of the Housing and Urban Act of 1968 (Section 3):**
The purpose of Section 3 is to ensure that employment and other economic opportunities is directed to low- and very low-income persons to the greatest extent feasible.
- **Women- and Minority-Owned Business Enterprises:**
The City will work to affirmatively further actions to allow Women- and Minority-Owned Business Enterprises (WMBE) to benefit from funds. The City will make a good faith effort to employ WMBE firms when implementing projects/programs. These efforts can include advertising for professional services or construction contractors in minority publications, notifying WMBE firms directly of employment opportunities, or encouraging that contractors hire WMBE subcontractors.

F. Non-Discrimination

No person shall be excluded from participation in, denied the benefit of, or be subject to discrimination under any program or activity funded in whole or in part with City funds on the basis of religion or religious affiliation, age, race, color, creed, gender, sexual orientation, marital status, familial status, physical or mental disability, gender identity or expression of a person, national origin, ancestry, military status, or other arbitrary cause.

G. Lead-Based Paint. The lead-based paint regulations are outlined in the Code of Federal Regulations (CFR), which are published in the Federal Register by the executive departments and agencies of the federal government. If lead-based paint is present in the unit as described in 24 CFR Part 35, which stipulates that lead hazard evaluation and reduction activities be carried out for all single-family residences constructed prior to 1978, the City will remediate the hazards in accordance with the regulations and the guidelines.

The City of Concord permits the use of funds for lead-based paint testing, assessment, abatement, and clearance reports.

H. Public Records

Materials and information submitted to or received by the City is subject to public disclosure unless otherwise exempt from disclosure under the North Carolina General Assembly's G.S.§132. No assurances can be given that any materials provided can be protected from public review and copying.

I. Recordkeeping and Retention of Records

Records related to City-funded projects and programs must be retained for at least five (5) years. For rental and homeownership development projects, general records and tenant/homebuyer data must be kept for five (5) years after project completion or until five (5) years after the conclusion of the affordability period.

J. Minimum Property Standards

All projects must pass the U. S. Department of Housing and Urban Development's (HUD's) Housing Quality Inspection (HQS) standards and must comply with the City of Concord's Housing Code.

All construction projects will meet local codes, ordinances and zoning requirements for the municipality or county in which the project is located. Projects also must comply with the *N.C. State Building Codes that are applicable to new construction, residential, and existing structures*. Housing must meet all applicable requirements upon project completion.

-Acronyms and Abbreviations

AC	Air conditioners
ACCA	Air Conditioning Contractors of America
AHRI	Air-conditioning, Heating, & Refrigeration Institute
AHU	Air-handling unit
ASHRAE	American Society of Heating, Refrigeration, and Air-Conditioning Engineers

Btuh	British thermal unit per hour
CFM	Cubic feet per minute
CFM50	Cubic feet per minute at 50 Pascals
CFM/30SF	Cubic feet per minute per 30 square feet
CO	Carbon monoxide
Cont	Continuous insulation
ERV	Energy Recovery Ventilator
F	Degrees in Fahrenheit
GPF	Gallons per flush
GPM	Gallons per minute
HRV	Heat recovery ventilator
HSPF	Heating Seasonal Performance Factor
IECC	International Energy Conservation Code
LED	Light-emitting diode
MDF	Medium Density Fiberboard
Mm	Millimeters
NA	Not applicable
PERM	Unit of measurement for the water vapor permeability of a material
PSC	Permanent Split Capacitor
PVC	Polyvinyl chloride
SEER	Seasonal Energy Efficient Rating
UA	Sum of U-factor times assembly area. May be used to determine code compliance for insulation when using an alternate compliance path
UEF	Uniform Energy Factor
UL	Underwriters Laboratories
VOC	Volatile Organic Compounds

All new construction projects will also meet the requirements described below:

- **Written cost estimates, construction contracts and construction documents.** The City will ensure that construction contracts and construction documents describe the work to be undertaken in adequate detail to conduct inspections. The City must review and approve written cost estimates for construction and determine that costs are reasonable.

- **Construction progress inspections.** The City will conduct progress and final inspections of construction to ensure that work is done in accordance with the applicable codes in the Concord Development Ordinance (CDO), the construction contract, and construction documents (draw requests).

- **New Construction Minimum Standards**

Affordable homes should not only mean that they are affordable to purchase, but should be affordable to heat and cool over time along with using materials and methods that create longevity of the structure. These homes should not only provide a place to live while its occupants are in good health, but also provide a place to “Age in Place”, which means designing them with details such as wider doorways in specific rooms, installing structural blocking for future placement of grab bars, and accessibility routes in and throughout the home. The City of Concord has created building and material standards that promote these ideals.

-Roofing:

- Install a minimum of ½-in OSB roof sheathing with foil backing.
- Install a minimum of 30# roofing felt.
- Install drip edge around perimeter of roof.
- Install a minimum of 30-yr architectural roofing shingles.
- Install soffit and ridge ventilation system.

-Insulation:

- Walls- R-19 or R-15 + R-3 continuous
- Attic- R-38
- Crawlspace- R-5 continuous on exterior foundation walls.

-Exterior Walls:

- Install ½” OSB wall sheathing.
- Install **2x6** framed walls with R-19 wall insulation *OR* install ½” XPS (Extruded polystyrene) rigid foam board along with weather resistant barrier (house wrap) over **2x4** stud wall and wall sheathing. Tape joints of WRB and rigid foam board.
- Install vinyl siding with panel thickness of .042” or thicker and 50-yr warranty or cement fiberboard siding. Can be used in conjunction with each other (e.g., cement fiber board body and vinyl siding in gables and on soffit).

-Windows and Exterior Doors:

- Exterior doors that are not under a porch roof should have PVC brick molding and rot proof jambs.
- All window and door units shall be Energy Star certified and labeled for the climate zone that it is being installed in.

-Foundation:

- Brick veneer foundations are preferred.

-Site:

- Ensure proper drainage away from the structure with a minimum slope of 6-in within the first 10ft of the structure.

-Driveways and Walkways:

- Driveways shall be made of asphalt or concrete and meet the City of Concord technical standards manual for driveways.
- A walkway from the driveway to the front entrance shall be made of concrete and be at least 42 inches wide.

-Crawlspace:

- All homes on built on crawlspaces shall be closed and adhere to the System Vision program standards.
- All homes built on concrete slabs shall have a moisture/vapor barrier with a rating of no more than a 0.1 permeability and shall be installed over 100% of the slab area with overlapping seams.

-Interior Walls:

- Interior walls shall have a minimum of ½” gypsum board covering.
- Interior paint shall be low VOC paint.

-Plumbing:

- Install ADA compliant toilets that use 1.3 gals or less of water.
- Showerheads shall use 2.25 GPM or less.
- Kitchen faucets shall use 2.2 GPM or less.
- Bath vanity faucets shall use 1.5 GPM or less.
- Water heaters shall have a UEF as indicated in the table:

-Water Heater Type

UEF Value

- | | |
|--|-----|
| • Electric Tank | .93 |
| • Gas Tank | .60 |
| • Gas Tankless | .61 |
| • Heat Pump | Any |
| • From the water heater, the first 3 feet of hot and cold pipes shall be insulated to ≥ R-4. | |

-Appliances and Lighting:

- All interior and exterior light fixtures shall have LED bulbs or be LED integrated fixtures.
- All appliances that the builder/developer provides shall be Energy Star certified.

-HVAC:

- Equipment Performance Values
- Furnaces: At least 90% efficient
- AC: At least 14 SEER
- Heat Pumps: At least 14 SEER and 8.2 HSPF
- A whole-home ACCA Manual J total load and ACCA Manual J room-by-room load calculation must be completed and submitted for each plan.
- Total duct leakage, measured in cubic feet per minute at 25 Pascals, shall not exceed 3% of the conditioned square footage. All duct connections shall be sealed with a UL-listed “bucket” mastic product.
- Heat pumps shall have an outdoor thermostat installed to prevent supplementary heater operation when the heat pump is capable of meeting the load. The lockout on the outdoor thermostat shall be set no lower than 35F and no higher than 40F.
- The measured airflow for each room shall be within +/- 20% or 25 CFM of the ACCA Manual J calculation. This requires supply manual dampers to be installed for bedrooms and bathrooms.
- Total system airflow shall be set between 300 and 400 CFM per ton in cooling or to total system airflow as specified by the manufacturer.
- Jumper ducts shall be used to balance each room in addition to door undercuts.
- All rooms within the conditioned space, except bathrooms and laundry, shall not exceed +/- 3 Pascals pressure differential with respect to the main body when the interior doors are closed and the AHU is operating.

-Ventilation:

- Bathroom and Kitchen exhaust fans must be vented through the roof with duct work in the attic being insulated.
- All dryer vents must be vented to the exterior of the foundation. The duct pipe in the crawlspace must be hard pipe with seams sealed with bucket mastic.
- All homes must be equipped with a filtered whole house ventilation system capable of meeting the current version of ASHRAE 62.2 that complies with one of the following options:
 - Option 1: Supply ventilation- Air handler cannot have a PSC (permanent split capacitor). The system shall be designed to operate intermittently and automatically based on a timer and restrict outdoor air intake when not in use (e.g. motorized damper). Ventilation at a minimum shall occur 10% of every 24 hours and at a maximum of 50% of every 24 hours.
 - Option 2: Design and install an approved balanced ventilation strategy including a HRV unit.

-Floors and floor covering:

- Install floor covering that is Low VOC with no MDF which is usually high in formaldehyde. Vinyl flooring shall have a limited lifetime residential warranty.

-Cabinets:

- All cabinetry shall be made of solid wood and/or plywood material. No particle board allowed.

-Combustion Safety and Radon Mitigation

- Any combustion appliance inside the conditioned space or closed crawlspace, other than gas ranges, shall be direct (sealed) vent or power (fan) vented. Vent-free gas logs and wood fire places are not allowed.
- One hard wired CO detector shall be installed per 1,000 square feet of living space (minimum of one per floor) in homes with any combustion appliance located within the conditioned space or that has an attached garage.
- Radon-ready house mitigation system: Install a 3 to 4-inch diameter PVC pipe T-fitting from below the crawlspace liner or slab. Connect it to a pipe that runs vertically through the house and exhausts to the exterior a minimum of 12 inches above the roof and 10 ft from openings into the conditioned spaces. Install a power supply accessible to the upper top 50% of the pipe in case there is a need to convert to an active radon system.

-Aging in Place

- One house entry door, one-bedroom door, and one-bathroom entry must be a minimum of 32" clear. A route from an exterior entrance through interior hallways must provide access to these interior entries, and this route must be a minimum of 36" clear throughout.
- One bathroom, near or off the bedroom with the 32" clear doorway shall have continuous blocking in walls using a minimum of 2x6 with the bottom of the blocking located at 31 inches above the floor around both toilet and shower to allow for future grab-bar installation.
- Install lever-style doorknobs on all doors.
- Install lever-style plumbing fixture handles throughout.

K. Accessibility

All housing must meet the accessibility requirements in 24 CFR part 8, which implements Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), and Titles II and III of the Americans with Disabilities Act (42 U.S.C. 12131-12189) implemented at 28 CFR parts 35 and 36, as applicable. Covered multifamily dwellings, as defined at 24 CFR 100.201, must also meet the design and construction requirements at 24 CFR 100.205, which implements the Fair Housing Act (42 U.S.C. 3601-3619). Rehabilitation may include improvements that are not required by regulation or statute that permit use by a person with disabilities.

L. Disaster Mitigation

Where relevant, the City requires housing to be improved to mitigate the impact of potential disasters (e.g., earthquake, hurricanes, flooding, and wildfires) in accordance with state and

local codes, ordinances, and requirements.

M. Compliance with State/Local Codes, Ordinances, and Zoning Requirements

City standards will require that rehabilitated housing meet all applicable state and local codes, ordinances, and requirements or, in the absence of a state or local building code, the International Existing Building Code of the International Code Council.

N. Uniform Physical Condition Standards

The City will use the Uniform Physical Conditions Standards (UPCS), HUD's prescribed physical inspection procedures. UPCS requires that upon completion, all federally- assisted projects and units will be decent, safe, sanitary and in good repair.

O. Inspection Procedures

The City will establish written inspection procedures. The procedures must include detailed inspection checklists, description of how and by whom inspections will be carried out, and procedures for training and certifying qualified inspectors. The procedures also must describe how frequently the property will be inspected.

P. Contractor Procurement

The City will obtain a minimum of two (2) bids on planned repairs, based on the preliminary work write-up prepared by the City's Construction Coordinator or other approved agent. Bids are to be returned on the specific due date. Staff will record the total amount of the bid and the date and time the bid was received. The City will evaluate the bid documents to determine which bids are eligible. Bids are considered eligible when the following conditions are met:

- The submitting contractor currently meets all program requirements and is not debarred or suspended.
- The contractor is not currently on probation, suspended or debarred by the state licensure board.
- The total dollar amount of the bid is within 10% of the total cost listed on the initial work write-up prepared.

City of Concord Purchasing Department Role. The Purchasing Department is the usual and normal vendor contact. In special cases, when it is not reasonable for the Purchasing Department to assume that role, the department representative will take the role of direct vendor contact and the Purchasing Department will adopt an advisory role.

It is the City's intent to take arranged discounts when properly earned. Faulty invoicing or delay in mailing will not be considered as cause for losing arranged discounts. Merchandise received subsequent to the due date on which we have taken a discount is subject to our inspection for quantity and condition, and suitable to adjustment if necessary.

Commitments for purchases are valid only when stated by purchase order, procurement card, or contract with appropriate detail and signed by the authorized official. No department head or coworker of the City is authorized to place a verbal order with a vendor or to take any other action that may obligate the City. Only the Mayor and City Manager are authorized to sign valid contracts for the City.

For more details, please access the City of Concord's Purchasing Policy via this webpage: (<https://www.concordnc.gov/Portals/0/Documents/Finance/Purchasing/Purchasing%20Policy%20June%202014%202018.pdf?ver=2018-06-15-164549-087>).

Q. Environmental Review Requirement

The City will conduct environmental reviews of each federally-funded, housing-related project to remain in compliance with HUD requirements. An environmental review is the process of reviewing a project and its potential environmental impacts to determine whether it meets federal, state, and local environmental standards. The environmental review process is required for all HUD-assisted projects to ensure that the proposed project does not negatively impact the surrounding environment and that the property site itself will not have an adverse environmental or health effect on end users. Not every project is subject to a full environmental review (i.e., every project's environmental impact must be examined, but the extent of this examination varies), but every project must be in compliance with the National Environmental Policy Act (NEPA), and other related Federal and state environmental laws.

The Uniform Relocation Assistance Policy was implemented in response to the City's need to define its process for assisting tenants and households that are affected by the City's housing activities or projects. This Policy establishes the compensation allowance and the relocation assistance that will be provided to tenants and households that are voluntarily, temporarily or permanently displaced. Comparable accommodations that meet the City's housing standards will be provided to the disturbed tenants and households while the construction work is being completed.



**CITY OF CONCORD
RESIDENTIAL ANTI-DISPLACEMENT
AND RELOCATION ASSISTANCE PLAN**

In order to comply with the requirements of Section 104(d) of the Housing and Community Development Act of 1974, the City of Concord adopts the following plan:

The City of Concord will replace all occupied and vacant occupiable very-low or low-income dwellings units that are demolished or converted to a use other than low- to moderate-income housing as a direct result of activities assisted with funds provided under the Housing and Community Development Act of 1974, as amended, as described in 24 CFR 570.606 (b)(1).

All replacement housing will be provided within three years of the commencement of the demolition or rehabilitation relating to conversion. Before obligating or expending funds that will directly result in such demolition or conversion, the City will make public and submit to HUD the following information in writing:

1. A description of the proposed assisted activity;
2. A general location on a map and approximate number of dwelling units by size (number of bedrooms) that will be demolished or converted to a use other than as low- to moderate-income dwelling units as a direct result of the assisted activity;
3. A time schedule for the commencement and completion of the demolition or conversion;
4. The general location on a map and approximate number of dwelling units by size (number of bedrooms) that will be provided as replacement dwelling units;
5. The source of funding and a time schedule for the provision of replacement dwelling units; and
6. The basis for concluding that each replacement dwelling unit will remain a low- to moderate-income dwelling unit for at least 10 years from the date of initial occupancy.

The City will provide relocation assistance, as described in 570.606 (b)(2), to each low- to moderate-income household displaced by the demolition of housing or by the conversion of a low- to moderate-income dwelling to another use as a direct result of assisted activities.

ORD. #

AN ORDINANCE TO AMEND FY 2021-2022 BUDGET ORDINANCE

WHEREAS, the City Council of the City of Concord, North Carolina did on the 10th day of June, 2021, adopt a City budget for the fiscal year beginning July 1, 2021 and ending on June 30, 2022, as amended; and

WHEREAS, it is appropriate to amend the expense/expenditures and the revenue accounts in the funds listed for the reason stated;

NOW, THEREFORE, BE IT ORDAINED by the City Council of the City of Concord that in accordance with the authority contained in G.S. 159-15, the following accounts are hereby amended as follows:

Account	Title	<u>Revenues</u>		(Decrease) Increase
		Current Budget	Amended Budget	
100-4603200	Police Grants	\$359,640	\$384,640	\$25,000
Total				\$25,000

Account	Title	<u>Expenses/Expenditures</u>		(Decrease) Increase
		Current Budget	Amended Budget	
4310-5122000	Overtime	\$379,485	\$404,485	\$25,000
Total				\$25,000

Reason: To appropriate the NC Governor's Highway Safety Program overtime grant awarded in the amount of \$25,000.

Adopted this 8th day of July, 2021.

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

William C. Dusch, Mayor

ATTEST: _____
Kim Deason, City Clerk

VaLerie Kolczynski, City Attorney

NORTH CAROLINA
CABARRUS COUNTY

**STORMWATER CONTROL MEASURES (SCMs), ACCESS EASEMENT AND
MAINTENANCE AGREEMENT**

THIS STORMWATER CONTROL MEASURES (SCMs), ACCESS EASEMENT AND MAINTENANCE AGREEMENT (“Agreement”), made this _____ day of _____, 2021, by Oaklawn Project I, LLC, a North Carolina limited liability company, whose principal address is 10100 Innovation Dr., Suite 410, Dayton, OH 45342 (hereinafter “Grantor”), with, to, and for the benefit of the City of Concord, a municipal corporation of the State of North Carolina, whose address is P.O. Box 308, Concord North Carolina 28026-0308, (hereinafter “Grantee” or “City”).

WITNESSETH:

WHEREAS, THE CITY COUNCIL ACCEPTED THIS STORMWATER CONTROL MEASURES (SCMs), ACCESS EASEMENT AND MAINTENANCE AGREEMENT ON _____.

WHEREAS, Grantor is the owner in fee simple of certain real property situated in the City of Concord, County of Cabarrus, North Carolina and more particularly described as follows: 9800 Harris Road, Concord, NC, Cabarrus County Property Identification Number (PIN): 4681-02-3931. It being the land conveyed to Grantor by deed recorded in Book and Page 14603/151 in the Office of the Register of Deeds for Cabarrus County (hereinafter referred to as the “Property”); and

WHEREAS, Grantor desires to develop or redevelop all or portions of the Property; and

WHEREAS, the Property is located within the planning jurisdiction of the City of Concord, and is subject to certain requirements set forth in the City of Concord Code of Ordinances Chapter 60, the Concord Development Ordinance, (hereafter “CCDO”), and the Concord Technical Standards Manual (hereafter “Concord Manual”); and

WHEREAS, conditions for development and/or redevelopment of the Property includes (i) the construction, operation and maintenance of two (2) engineered stormwater control structures, namely two (2) Sand Filters, as provided in the CCDO and the Concord Manual (the “Stormwater Control Measures” or “SCMs”), (ii) Grantor’s dedication of a non-exclusive access easement to the City, as described in this

Agreement, for inspection and maintenance of the Stormwater Control Measures; and (iii) the assumption by Grantor of certain specified maintenance and repair responsibilities; and

WHEREAS, this Agreement and the easements created herein are established in accordance with the requirements of N.C.G.S. Sec 143-211 *et. seq.*, Article 4 of the CCDO and Article I of the Concord Manual; and

WHEREAS, Grantor has full authority to execute this Agreement so as to bind the Property and all current and future owners and/or assigns.

NOW, THEREFORE, for valuable consideration, including the benefits Grantor may derive there from, the receipt and sufficiency of which is hereby acknowledged, Grantor hereby dedicates, bargains, grants and conveys unto Grantee, and its successors and assigns, a perpetual, and irrevocable right and non-exclusive easement in gross (of the nature and character and to the extent hereinafter set forth) in, on, over, under, through and across those portions of the Property shown on the attached **Exhibit “A” titled “SCM Maintenance & Access Easement” and labeled “SCM Maintenance & Access Easement Sand Filter #1 32089.55 sf 0.737 AC”** and as shown on the attached **Exhibit “B” titled “SCM Maintenance & Access Easement” and labeled “SCM Maintenance & Access Easement Sand Filter #2 30614.91 sf 0.703 AC”**, for the purpose of inspection and maintenance of the Stormwater Control Measures (hereinafter referred to as “SCM Easements”). Within the SCM Easements Grantor shall conduct best management practices as more fully set forth herein and in the CCDO and Concord Manual. Also within the SCM Easements, Grantor shall construct, maintain, repair and reconstruct the Stormwater Control Measures or SCMs, which include (i) the SCMs and any other stormwater quantity and/or quality control devices and/or structures, described on the plans approved by the City of Concord and filed at the A.M. Brown Operations Center, 850 Warren Coleman Blvd., Concord, NC 28025; and (ii) access to the aforesaid SCMs from Harris Road as shown on the attached **Exhibit “A” and Exhibit “B” titled “SCM Maintenance & Access Easement” and labeled “Harris Road Variable Public R/W Map Bk. 53, Pg. 65 & Bk. 65, Pg. 86”**, for the purpose of permitting City access, inspection and, in accordance with the terms of paragraph 4 of this Agreement, maintenance and repair of the SCMs, as more fully set forth herein and in the CCDO and Concord Manual. Except as set forth herein, nothing contained in this Agreement shall be deemed to be a gift or dedication of any portion of Grantor’s Property to the general public or for any public use or purpose whatsoever, and further except as specifically provided herein for the benefit of the City, no rights, privileges or immunities of Grantor shall inure to the benefit of any third-party, nor shall any third-party be deemed to be a beneficiary of any of the provisions contained herein.

The additional terms, conditions, and restrictions of this Agreement are:

1. The requirements pertaining to the SCM Easements are more fully set forth in the current adopted and published editions of the following four (4) documents: (i) Article 4 of the CCDO, (ii) Article I, Section 1 of the Concord Manual, (iii) the Sand Filter Inspection and Maintenance Plan attached as **Exhibit “C”** and (iv) as provided in the N.C. Dept. of Environment and Natural Resources (DENR) Stormwater Best Management Practices (BMP) Manual (the “NCDENR Manual”), all of which are incorporated herein by reference as if set forth in their entireties below. Grantor agrees to abide by all applicable codes including, but not limited to, those set forth above. All provisions required by the CCDO Section 4.4.6.B.1 are incorporated herein by reference, and Grantor agrees to abide by said provisions. Grantor further agrees that Grantor shall perform the following, all at its sole cost and expense:

a. All components of the SCMs and related improvements within the SCM Easements are to be kept in good working order.

b. The components of the SCMs and related improvements within the SCM Easements shall be maintained by Grantor as described in “**Exhibit C**”, the Sand Filter Inspection and Maintenance Plan.

2. Upon completion of the construction of the SCMs, Grantor’s N.C. registered professional engineer shall certify in writing to the Concord Director of Water Services that the SCMs and all components are constructed and initially functioning as designed. Annual inspection reports (hereinafter referred to as “Annual Report(s)”) are required each year and shall be made by Grantor on the written schedule provided to Grantor in advance by the City. The Annual Report(s) shall describe the condition and functionality of the SCMs, and shall describe any maintenance performed thereon during the preceding year. The Annual Report(s) shall be submitted with the signature and seal of Grantor’s N.C. registered professional engineer conducting the inspection. If necessary, the City will provide a letter describing the maintenance necessary to keep the SCMs and all components and structures related to the SCMs functioning as designed and with reasonable timeframes in which to complete the maintenance. If the Annual Report(s) recommends maintenance actions, the repairs shall be made within a reasonable time as defined by the City.

Grantor and Grantee understand, acknowledge and agree that the attached Inspection and Maintenance Plans describe the specific actions needed to maintain the SCMs.

3. Grantor represents and warrants that Grantor are financially responsible for construction, maintenance, repair and replacement of the SCMs, its appurtenances and vegetation, including impoundment(s), if any. Grantor agrees to perform or cause to be performed the maintenance as outlined in the attached Sand Filter Inspection and Maintenance Plan and as provided in the NCDENR Manual. Grantor and any subsequent transferee of Grantor or succeeding owner of the Property shall give the City written notice of the transfer of a fee or possessory interest in the Property listing the transferee’s name, address of the Property, transferee’s mailing address and other contact information. Grantor and any subsequent transferee of Grantor or succeeding owner of the Property shall not be responsible for errors or omissions in the information about the transferee provided to the City caused by acts or omissions of the transferee. The transferee shall give the City written notice of the acceptance and any future transfer of an interest in the Property listing the transferee’s name, address of the Property; transferee’s mailing address and other contact information. Upon the conveyance of the Property by Grantor to any transferee acquiring the Property by means of a conveyance document containing the language set forth in paragraph 9 below, Grantor are released from any further covenants or other obligations set forth in this Agreement.

4. If Grantor fails to comply with these requirements, or any other obligations imposed herein, in the City of Concord Code of Ordinances, CCDO, the Concord Manual or approved Inspection and Maintenance Plan, the City of Concord may perform (but is not obligated to perform) such work as Grantor is responsible for and recover the costs thereof from Grantor.

5. This Agreement gives Grantee the following affirmative rights:

Grantee, its officers, employees, and agents may, but is not obligated, to enter the SCM Easements whenever reasonably necessary for the purpose of inspecting same to determine compliance herewith, to maintain same and make repairs or replacements to the SCMs, its appurtenances and condition(s) as may be necessary or convenient thereto in the event Grantor defaults in its obligations and to recover from Grantor the cost thereof, and in addition to other rights and remedies available to it, to enforce by proceedings at law or in equity the rights, covenants, duties, and other obligations herein imposed in this Agreement.

6. Grantor shall neither obstruct nor hinder the passage of vehicular traffic and pedestrians within the paved portion of the access easement granted herein by Grantor to Grantee.

7. Grantor shall, in all other respects, remain the fee owners of the Property and areas subject to the SCM Easements, and may make all lawful uses of the Property not inconsistent with this Agreement and the Easements granted herein.

8. Grantee neither waives nor forfeits the right to act to ensure compliance with the terms, conditions and purposes of the SCM Easements and this Agreement by a prior failure to act.

9. Grantor agrees:

a. That a reference to the deed book and page number of this document in a form substantially similar to the following statement in at least a 12 point bold face font on the first page of the document: **“Notice: The Property is subject to a Stormwater Control Measures (SCMs), Access Easement and Maintenance Agreement enforced by the City of Concord and State of North Carolina recorded in the Cabarrus County Registry at DB _____ PG ____.”** shall be inserted by Grantor in any subsequent deed or other legal instrument by which Grantor may be divested of either the fee simple title to or possessory interests in the subject Property. The designation Grantor and Grantee shall include the parties, their heirs, successors and assigns; and

b. That the following statement shall be inserted in any deed or other document of conveyance:

“Title to the property hereinabove described is subject to the following exceptions:

That certain Stormwater Control Measures (SCMs), Access Easement and Maintenance Agreement dated _____, 2021 with and for the benefit of the City of Concord, recorded in Book _____, Page _____ in the Cabarrus County Registry, North Carolina, creating obligations of payment and performance on the part of Grantor which Grantee hereby assumes and agrees to perform and pay as part of the consideration of this conveyance and except further that this conveyance is made subject to any and all enforceable restrictions and easements of record (if applicable).”

In the event that such conveyance is other than by deed, the above terms of “grantor/grantee” may be substituted by equivalent terms such as “landlord/tenant.”

TO HAVE AND TO HOLD the aforesaid rights, privileges, and easements herein granted to Grantee, its successors and assigns forever and Grantor do covenant that Grantor is seized of said premises in fee and has the right to convey the same, that except as set forth below the same are free from encumbrances and that Grantor will warrant and defend the said title to the same against claims of all persons whosoever.

Title to the Property hereinabove described is subject to all enforceable deeds of trust, liens, easements, covenants and restrictions of record.

The covenants agreed hereto and the conditions imposed herein shall be binding upon Grantor and its agents, personal representatives, heirs and assigns and all other successors in interest to Grantor and shall continue as a servitude running in perpetuity with the above-described land.

THE CONCORD CITY COUNCIL APPROVED THIS AGREEMENT AND SCM ACCESS EASEMENTS AND ACCEPTED THE SCM ACCESS EASEMENTS AT THEIR MEETING OF _____, 2021 AS ATTESTED TO BELOW BY THE CITY CLERK. CONCORD CITY COUNCIL APPROVAL OF THIS AGREEMENT AND EASEMENT IS A CONDITION PRECEDENT TO ACCEPTANCE BY THE CITY.

IN WITNESS WHEREOF, the parties have caused this instrument to be duly executed day and year first above written.

GRANTOR:

Oaklawn Project I, LLC, a
North Carolina limited liability company

By: _____
Name: _____, _____
Title

STATE OF _____
COUNTY OF _____

I, _____, a Notary Public of the aforesaid County and State, do hereby certify that _____ personally appeared before me this day and acknowledged that he/she is the _____ of Oaklawn Project I, LLC, a North Carolina limited liability company and that he/she as _____ being authorized to do so, executed the foregoing on behalf of the company.

WITNESS my hand and Notarial Seal this the _____ day of _____, 2021.

Notary Public
My commission expires: _____

GRANTEE:

City of Concord, a municipal corporation

By: _____
Lloyd Wm. Payne, Jr., City Manager

ATTEST:

Kim J. Deason, City Clerk
[SEAL]

APPROVED AS TO FORM

VaLerie Kolczynski, City Attorney

**STATE OF NORTH CAROLINA
COUNTY OF CABARRUS**

I, _____, a Notary Public of the aforesaid County and State, do hereby certify that Kim J. Deason personally appeared before me this day and acknowledged that she is the City Clerk of the City of Concord and that by authority duly given and as the act of the municipal corporation, the foregoing STORMWATER CONTROL MEASURES (SCMs), ACCESS EASEMENT AND MAINTENANCE AGREEMENT was approved by the Concord City Council at its meeting held on _____ and was signed in its name by its City Manager, sealed with its corporate seal and attested by her as its City Clerk.

WITNESS my hand and notarial seal, this the ____ day of _____, 2021.

Notary Public _____
My commission expires: _____

NORTH CAROLINA
CABARRUS COUNTY

**STORMWATER CONTROL MEASURE (SCM), ACCESS EASEMENT AND
MAINTENANCE AGREEMENT**

THIS STORMWATER CONTROL MEASURE (SCM), ACCESS EASEMENT AND MAINTENANCE AGREEMENT (“Agreement”), made this _____ day of _____ 2021, by Table Rock RE Investments, LLC, a North Carolina limited liability company, whose principal address is 227 West 4th Street, Suite 219, Charlotte, NC 28202 (hereinafter “Grantor”), with, to, and for the benefit of the City of Concord, a municipal corporation of the State of North Carolina, whose address is P.O. Box 308, Concord North Carolina 28026-0308, (hereinafter “Grantee” or “City”).

WITNESSETH:

WHEREAS, THE CITY COUNCIL ACCEPTED THIS STORMWATER CONTROL MEASURES (SCMs), ACCESS EASEMENT AND MAINTENANCE AGREEMENT ON _____.

WHEREAS, Grantor is the owner in fee simple of certain real property situated in the City of Concord, County of Cabarrus, North Carolina and more particularly described as follows: Concord Parkway South, Concord, NC, Cabarrus County Property Identification Number (PIN): 5610-72-6291. It being the land conveyed to Grantor by deed recorded in Book and Page 14724/338 in the Office of the Register of Deeds for Cabarrus County (hereinafter referred to as the “Property”); and

WHEREAS, Grantor desires to develop or redevelop all or portions of the Property; and

WHEREAS, the Property is located within the planning jurisdiction of the City of Concord and is subject to certain requirements set forth in the City of Concord Code of Ordinances Chapter 15 the Concord Development Ordinance, (hereafter “CCDO”), and the Concord Technical Standards Manual (hereafter “Concord Manual”); and

WHEREAS, conditions for development and/or redevelopment of the Property include (i) construction, operation and maintenance of an engineered stormwater control structure, namely a Stormwater Filter, as provided in the CCDO and the Concord Manual (the “Stormwater Control Measure”);

“SCM”), (ii) Grantor’s dedication of a non-exclusive access easement to the City as prescribed in the Restriction and Easement Agreement pertaining to property recorded in Book 2532 at Page 246 in the Cabarrus County Registry, and as described in this Agreement, for inspection and maintenance of the Stormwater Control Measure; and (iii) the assumption by Grantor of certain specified maintenance and repair responsibilities; and

WHEREAS, this Agreement and the easements created herein are established in accordance with the requirements of N.C.G.S. Sec 143-211 *et. seq.*, Article 4 of the CCDO and Article I of the Concord Manual; and

WHEREAS, Grantor has full authority to execute this Agreement so as to bind the Property and all current and future owners and/or assigns.

NOW, THEREFORE, for valuable consideration, including the benefits Grantor may derive there from, the receipt and sufficiency of which is hereby acknowledged, Grantor hereby dedicates, bargains, grants and conveys unto Grantee, and its successors and assigns, a perpetual, and irrevocable right and non-exclusive easement in gross (of the nature and character and to the extent hereinafter set forth) in, on, over, under, through and across those portions of the Property shown on the attached **Exhibit “A” titled “Easement Exhibit for Storm Drainage Easement” and labeled “SCM Access to Right-of-Way & Maintenance Easement 7,015 SQ.FT. 0.161 Acres”** for the purpose of inspection and maintenance of the Stormwater Control Measure (hereinafter referred to as “SCM Easement”). Within the SCM Easement Grantor shall conduct best management practices as more fully set forth herein and in the CCDO and Concord Manual. Also within the SCM Easement, Grantor shall construct, maintain, repair and reconstruct the Stormwater Control Measure or SCM, which include (i) the SCM and any other stormwater quantity and/or quality control devices and/or structures, described on the plans approved by the City of Concord and filed at the A.M. Brown Operations Center, 850 Warren Coleman Blvd., Concord, NC 28025; and (ii) access to the aforesaid SCM as shown on the attached **Exhibit “A” titled “Easement Exhibit for Storm Drainage Easement” and labeled “NO Access to Right-of-Way is granted by Deed recorded in Book 2532, Page 246” of the Cabarrus County Registry**, for the purpose of permitting City access, inspection and, in accordance with the terms of paragraph 4 of this Agreement, maintenance and repair of the SCM, as more fully set forth herein and in the CCDO and Concord Manual. Except as set forth herein, nothing contained in this Agreement shall be deemed to be a gift or dedication of any portion of Grantors’ Property to the general public or for any public use or purpose whatsoever, and further except as specifically provided herein for the benefit of the City, no rights, privileges or immunities of Grantors shall inure to the benefit of any third-party, nor shall any third-party be deemed to be a beneficiary of any of the provisions contained herein.

The additional terms, conditions, and restrictions of this Agreement are:

1. The requirements pertaining to the SCM Easements are more fully set forth in the current adopted and published editions of the following four (4) documents: (i) Article 4 of the CCDO, Article I, Section 1 of the Concord Manual, (iii) the Sand Filter Inspection and Maintenance Easement attached as **Exhibit “B”** and (iv) as provided in the N.C. Dept. of Environment and Natural Resources (DENR) Stormwater Best Management Practices (BMP) Manual (the “NCDENR Manual”), all of which are incorporated herein by reference as if set forth in their entireties below. Grantor agrees to abide by all applicable codes including, but not limited to, those set forth above. All provisions

required by the CCDO Section 4.4.6.B.1 are incorporated herein by reference, and Grantor agrees to abide by said provisions. Grantor further agrees that Grantor shall perform the following, all at its sole cost and expense:

- a. All components of the SCM and related improvements within the SCM Easements are to be kept in good working order.
- b. The components of the SCM and related improvements within the SCM Easements shall be maintained by Grantors as described in “**Exhibit B**”, the Sand Filter Inspection and Maintenance Plan.

2. Upon completion of the construction of the SCM, Grantor’s N.C. registered professional engineer shall certify in writing to the Concord Director of Water Services that the SCM and its components are constructed and initially functioning as designed. Annual inspection reports (hereinafter referred to as “Annual Report(s)”) are required each year and shall be made by Grantor on the written schedule provided to Grantors in advance by the City. The Annual Report(s) shall describe the condition and functionality of the SCM, and shall describe any maintenance performed thereon during the preceding year. The Annual Report(s) shall be submitted with the signature and seal of Grantor’s N.C. registered professional engineer conducting the inspection. If necessary, the City will provide a letter describing the maintenance necessary to keep the SCM and all components and structures related to the SCM functioning as designed and with reasonable timeframes in which to complete the maintenance. If the Annual Report(s) recommends maintenance actions, the repairs shall be made within a reasonable time as defined by the City.

Grantor and Grantee understand, acknowledge and agree that the attached Inspection and Maintenance Plan describes the specific actions needed to maintain the SCM.

3. Grantor represents and warrants that Grantor is financially responsible for construction, maintenance, repair and replacement of the SCM, its appurtenances and vegetation, including impoundment(s), if any. Grantor agrees to perform or cause to be performed the maintenance outlined in the attached Inspection and Maintenance Plan and as provided in the NCDENR Manual. Grantor and any subsequent transferee of Grantor or succeeding owner of the Property shall give the City written notice of the transfer of a fee or possessory interest in the Property listing the transferee’s name, address of the Property, transferee’s mailing address and other contact information. Grantor and any subsequent transferee of Grantor or succeeding owner of the Property shall not be responsible for errors or omissions in the information about the transferee provided to the City caused by acts or omissions of the transferee. The transferee shall give the City written notice of the acceptance and future transfer of an interest in the Property listing the transferee’s name, address of the Property, transferee’s mailing address and other contact information. Upon the conveyance of the Property to any transferee acquiring the Property by means of a conveyance document containing language set forth in paragraph 9 below, Grantor is released from any further covenants or obligations set forth in this Agreement.

4. If Grantor fails to comply with these requirements, or any other obligations imposed hereon in the City of Concord Code of Ordinances, CCDO, the Concord Manual or approved Inspection and Maintenance Plan, the City of Concord may perform (but is not obligated to perform) such work as Grantor is responsible for and recover the costs thereof from Grantor.

5. This Agreement gives Grantee the following affirmative rights:

Grantee, its officers, employees, and agents may, but is not obligated, to enter the SCM Easements whenever reasonably necessary for the purpose of inspecting same to determine compliance herewith, to maintain same and make repairs or replacements to the SCM, the appurtenances and condition(s) as may be necessary or convenient thereto in the event Grantor defaults in its obligations and to recover from Grantor the cost thereof, and in addition to other rights and remedies available to it, to enforce by proceedings at law or in equity the rights, covenants, duties and other obligations herein imposed in this Agreement.

6. Grantor shall neither obstruct nor hinder the passage of vehicular traffic and pedestrian within the paved portion of the access easement granted herein by Grantor to Grantee.

7. Grantor shall, in all other respects, remain the fee owner of the Property and areas subject to the SCM Easements, and may make all lawful uses of the Property not inconsistent with this Agreement and the Easements granted herein.

8. Grantee neither waives nor forfeits the right to act to ensure compliance with the terms, conditions and purposes of the SCM Easements and this Agreement by a prior failure to act.

9. Grantor agrees:

a. That a reference to the deed book and page number of this document in a form substantially similar to the following statement in at least a 12 point bold face font on the first page of any document: **“Notice: The Property is subject to a Stormwater Control Measure (SCM) Access Easement and Maintenance Agreement enforced by the City of Concord and State of North Carolina recorded in the Cabarrus County Registry at DB _____ PG _____.”** shall be inserted by Grantors in any subsequent deed or other legal instrument by which Grantor may be divested of either the fee simple title to or possessory interests in the subject Property. The designation Grantor and Grantee shall include the parties, their heirs, successors and assigns; and

b. That the following statement shall be inserted in any deed or other document conveying:

“Title to the property hereinabove described is subject to the following exceptions:

That certain Stormwater Control Measure (SCM), Access Easement and Maintenance Agreement dated _____, 2021 with and for the benefit of the City of Concord, recorded in Book _____, Page _____ in the Cabarrus County Registry, North Carolina, creating obligations of payment and performance on the part of Grantor which Grantee hereby assumes and agrees to perform and pay as part of the consideration of this conveyance and except further that this conveyance is made subject to all and all enforceable restrictions and easements of record (if applicable).”

In the event that such conveyance is other than by deed, the above terms of "grantor/grantee" may be substituted by equivalent terms such as "landlord/tenant."

TO HAVE AND TO HOLD the aforesaid rights, privileges, and easements herein granted to Grantee, its successors and assigns forever and Grantor does covenant that Grantors are seized of said premises in fee and has the right to convey the same, that except as set forth below the same are free from encumbrances and that Grantors will warrant and defend the said title to the same against claim of all persons whatsoever.

Title to the Property hereinabove described is subject to all enforceable deeds of trust, liens, easements, covenants and restrictions of record.

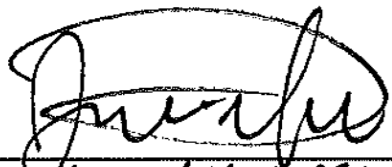
The covenants agreed hereto and the conditions imposed herein shall be binding upon Grantors and their agents, personal representatives, heirs and assigns and all other successors in interest. Grantors and shall continue as a servitude running in perpetuity with the above-described land.

THE CONCORD CITY COUNCIL APPROVED THIS AGREEMENT AND SCM ACCESS EASEMENTS AND ACCEPTED THE SCM ACCESS EASEMENTS AT THEIR MEETING OF _____, 2021 AS ATTESTED TO BELOW BY THE CITY CLERK. CONCORD CITY COUNCIL APPROVAL OF THIS AGREEMENT AND EASEMENT IS A CONDITION PRECEDENT TO ACCEPTANCE BY THE CITY.

IN WITNESS WHEREOF, the parties have caused this instrument to be duly executed day and year first above written.

GRANTOR:

Table Rock RE Investments, LLC,
a North Carolina limited liability company

By: 
Name: JOSEPH MARIN
Title: MANAGER

STATE OF NC
COUNTY OF MECKLENBURG

I, SUDESH KASHYAP, a Notary Public of the aforesaid County and State, do hereby certify that JOSEPH MARIN personally appeared before me this day and acknowledged that he/she is the Manager/Member of Table Rock RE Investments, LLC, a North Carolina limited liability company, and that he being authorized to do so, executed the foregoing on behalf of the company.

WITNESS my hand and Notarial Seal this the 21 day of JUNE, 2021

Sudesh Kashyap
Notary Public
Mecklenburg County, NC
Comm. Exp. Oct. 04, 2024

Sudesh Kashyap
Notary Public
My commission expires: 10/04/2024

GRANTEE:

City of Concord, a municipal corporation

By: _____
Lloyd Wm. Payne, Jr., City Manager

ATTEST:

Kim J. Deason, City Clerk
[SEAL]

APPROVED AS TO FORM

VaLerie Kolczynski, City Attorney

**STATE OF NORTH CAROLINA
COUNTY OF CABARRUS**

I, _____, a Notary Public of the aforesaid County and State of North Carolina do hereby certify that Kim J. Deason personally appeared before me this day and acknowledged to me that she is the City Clerk of the City of Concord and that by authority duly given and as the act of the City of Concord, a municipal corporation, the foregoing STORMWATER CONTROL MEASURE (SCM), ACCEPTANCE OF EASEMENT AND MAINTENANCE AGREEMENT was approved by the Concord City Council at its meeting held on _____ and was signed in its name by its City Manager, sealed with its corporate seal and attested by her as its City Clerk.

WITNESS my hand and notarial seal, this the _____ day of _____, 2021.

Notary Public _____
My commission expires: _____

LEGEND

- BOUNDARY LINE
- - - ADJOINING PROPERTY EASEMENT
- IRON FOUND (AS DESCRIBED)
- CALCULATED POINT
- ▨ STORM DRAIN EASEMENT

THE PURPOSE OF THIS PLAT IS TO ACQUIRE STORM DRAINAGE EASEMENT AS SHOWN

FLOOD NOTE:

THE SUBJECT PROPERTY IS LOCATED WITHIN FLOOD ZONE "X", DEFINED AS AREAS DETERMINED TO BE OUTSIDE THE 0.2% ANNUAL CHANCE FLOOD PLAIN, AS DETERMINED BY THE FEDERAL EMERGENCY (FEMA), COMMUNITY PANEL NUMBER 371056100004, EFFECTIVE DATE NOVEMBER 16, 2018.

O'REILLY AUTOMOTIVE INC.
 DB.912 PG.447
 MB. 58 PG. 100
 TAX ID#56107251230000
 TRACT 1

NOTE: ACCESS TO RIGHT-OF-WAY IS GRANTED BY DEED RECORDED IN BOOK 2532, PAGE 246

THIS MAP MAY NOT BE A CERTIFIED SURVEY AND HAS NOT BEEN REVIEWED BY A LOCAL GOVERNMENT AGENCY FOR COMPLIANCE WITH ANY APPLICABLE LAND DEVELOPMENT REGULATIONS AND HAS NOT BEEN REVIEWED FOR COMPLIANCE WITH RECORDING REQUIREMENTS FOR PLATS

I, LAWRENCE J. WHITTAKER, CERTIFY THAT THIS PLAT WAS PREPARED UNDER MY SUPERVISION AND THAT THE PLAT WAS PREPARED FOR THE PURPOSE OF EASEMENT ACQUISITION ONLY, AND IS NOT INTENDED TO BE A BOUNDARY SURVEY OF THE PROPERTY SHOWN.

LAWRENCE J. WHITTAKER 6/21/2021

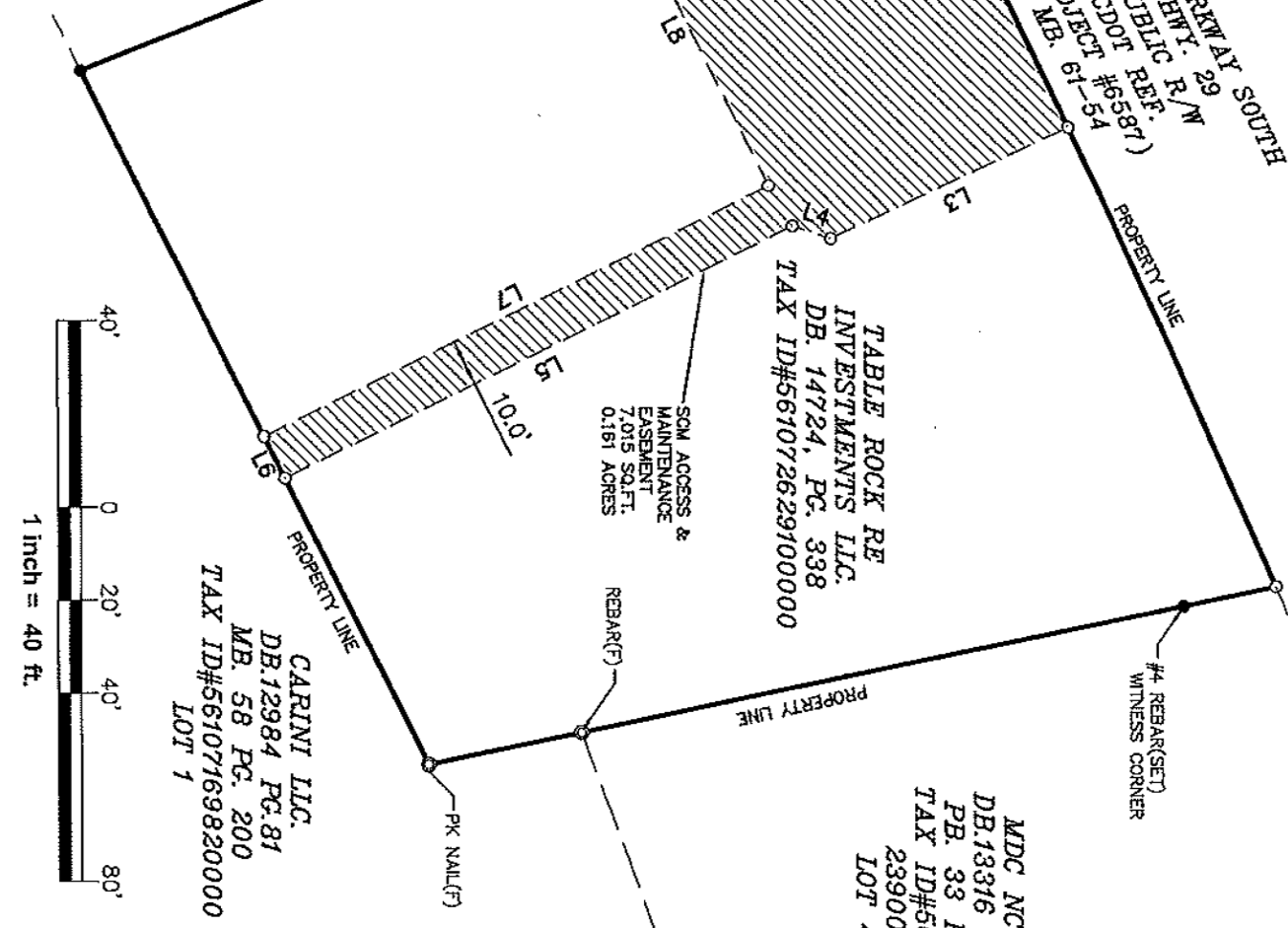
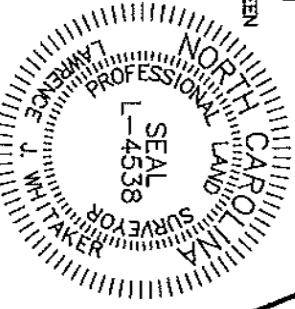


TABLE ROCK RE INVESTMENTS LLC.
 DB. 14724, PG. 338
 TAX ID#5610726291000000

CARINI LLC.
 DB.12984 PG.81
 MB. 58 PG. 200
 TAX ID#56107169820000
 LOT 1

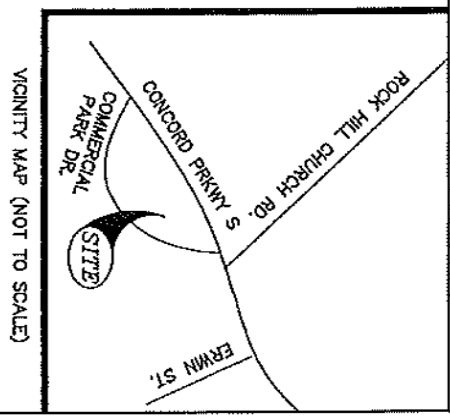
MDC NCI LP
 DB.13316 PG.211
 PB. 33 PG. 41
 TAX ID#5610728
 2390000
 LOT 4A

LINE	BEARING	DISTANCE
L1	S 21°49'15" E	19.96'
L2	S 63°40'26" W	2.55'
L3	N 24°58'01" W	55.71'
L4	N 18°39'54" E	8.59'
L5	N 26°20'06" W	120.81'
L6	S 63°39'54" W	10.00'
L7	S 26°20'06" E	120.00'
L8	S 63°39'54" W	77.63'
L9	S 21°49'15" E	43.92'

NOTES

1. ALL DISTANCES SHOWN ARE HORIZONTAL GROUND DISTANCES.
2. THE PURPOSE OF THIS MAP IS TO SHOW STORM DRAINAGE EASEMENT.
3. THIS SURVEY WAS PREPARED FROM A FIELD RUN SURVEY PERFORMED BY GPA DURING JANUARY OF 2020.
4. IMPROVEMENTS NOT SHOWN FOR REASONS OF CLARITY.

TITLE REFERENCE:
 TABLE ROCK RE INVESTMENTS LLC.
 DB 14724, PG 338
 PARCEL #5610726291000000



GPA
 PROFESSIONAL LAND SURVEYORS OF CHARLOTTE NC, INC.
 NC LICENSE C-2693
 694 OF CHARLOTTE, NC
 695 PHILIP DAVIS DRIVE
 CHARLOTTE NC 28226-6916
 OFFICE (704) 333-8600

OWNER:
 TABLE ROCK RE INVESTMENTS LLC
 PIN#5610726291000000
 CITY CONCORD, NC.

EASEMENT EXHIBIT FOR STORM DRAINAGE EASEMENT

JOB NO. 2000032 DATE 06/21/2021



Sand Filter Inspection and Maintenance Plan

Grantor agrees to keep a maintenance record on this SCM. This maintenance record will be kept in a log in a known set location. Any deficient SCM elements noted in the inspection will be corrected, repaired or replaced immediately. These deficiencies can affect the integrity of structures, safety of the public, and the removal efficiency of the SCM.

Important maintenance procedures:

- The drainage area will be carefully managed to reduce the sediment load to the sand filter.
- Once a year, sand media will be skimmed.
- The sand filter media will be replaced whenever it fails to function properly after vacuuming.

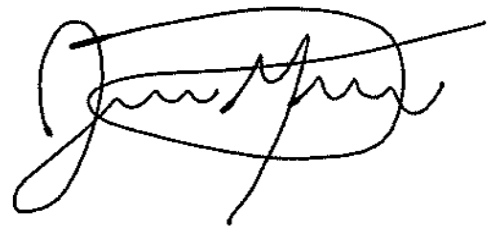
The sand filter will be inspected **quarterly and within 24 hours after every storm event greater than 1.0 inches**. Records of inspection and maintenance will be kept in a known set location and will be available upon request.

Inspection activities shall be performed as follows. Any problems that are found shall be repaired immediately.

SCM element:	Potential problem:	How I will remediate the problem:
The entire SCM	Trash/debris is present.	Remove the trash/debris.
The adjacent pavement (if applicable)	Sediment is present on the pavement surface.	Sweep or vacuum the sediment as soon as possible.
The perimeter of the sand filter	Areas of bare soil and/or erosive gullies have formed.	Regrade the soil if necessary to remove the gully, and then plant a ground cover and water until it is established. Provide lime and a one-time fertilizer application.
	Vegetation is too short or too long.	Maintain vegetation at a height of approximately six inches.
The flow diversion structure	The structure is clogged.	Unclog the conveyance and dispose of any sediment off-site.
	The structure is damaged.	Make any necessary repairs or replace if damage is too large for repair.

The pretreatment area	Sediment has accumulated to a depth of greater than six inches.	Search for the source of the sediment and remedy the problem if possible. Remove the sediment and dispose of it in a location where it will not cause impacts to streams or the SCM.
	Erosion has occurred.	Provide additional erosion protection such as reinforced turf matting or riprap if needed to prevent future erosion problems.
	Weeds are present.	Remove the weeds, preferably by hand. If a pesticide is used, wipe it on the plants rather than spraying.

SCM element:	Potential problem:	How I will remediate the problem:
The filter bed and underdrain collection system	Water is ponding on the surface for more than 24 hours after a storm.	Check to see if the collector system is clogged and flush if necessary. If water still ponds, remove the top few inches of filter bed media and replace. If water still ponds, then consult an expert.
The outflow spillway and pipe	Shrubs or trees have started to grow on the embankment.	Remove shrubs and trees immediately.
	The outflow pipe is clogged.	Provide additional erosion protection such as reinforced turf matting or riprap if needed to prevent future erosion problems.
	The outflow pipe is damaged.	Repair or replace the pipe.
The receiving water	Erosion or other signs of damage have occurred at the outlet.	Contact Stormwater Services at 704-920-5360.



Joseph Marin
Member/Manager
Table Rock RE Investments LLC

Consent of Lienholder

First National Bank of Pennsylvania ("Lienholder"), hereby consents to the grant of the foregoing Stormwater Control Measure (SCM), Access Easement and Maintenance Agreement by Table Rock RE Investments, LLC, a North Carolina limited liability company, filed in Deed Book _____ at Page _____, and joins in the execution hereof solely as Lienholder and hereby does agree that in the event of the foreclosure of the Construction Deed of Trust Securing Future Advances and any amendments thereto recorded in Deed Book 14724, Page 341 and the Assignment of Rents recorded in Deed Book 14742, Page 357 both of the Cabarrus County Register of Deeds Office or other sale of said property described in the aforesaid documents under judicial or non-judicial proceedings, the same shall be sold subject to said Agreement and Easement.

SIGNED AND EXECUTED this 11th day of June, 2021.

First National Bank of Pennsylvania

By: [Signature]
Name: Blake W. Morris
Title: SUP

STATE OF North Carolina
COUNTY OF Mecklenburg

I, Kelli L. Holcombe, a Notary Public in and for Mecklenburg County and State of North Carolina do hereby certify that Blake W. Morris, as SUP of First National Bank of Pennsylvania personally appeared before me this day and acknowledged to me voluntarily signed the foregoing document for the purpose stated therein.

WITNESS my hand and Notarial Seal this the 11th day of June, 2021.

My Commission Expires: 09/04/2024 [Signature] Notary Public

KELLI L HOLCOMBE
NOTARY PUBLIC
Mecklenburg County
North Carolina
My Commission Expires 09/04/2024



MEMORADUM

DATE: Tuesday, June 08, 2021
 TO: Sue Hyde, Director of Engineering
 FROM: Gary Stansbury, Construction Manager
 SUBJECT: Infrastructure Acceptance
 PROJECT NAME: Campbell Farms Subdivision PH 1 MP 2
 PROJECT NUMBER: 2018-016
 DEVELOPER: River Rock Capital Partners, LLC
 FINAL CERTIFICATION - LOT NUMBERS: 24-43, 46-47,50-53, 24-43, 64-72, 115-124, 128-141
 INFRASTRUCTURE TYPE: Water and Sewer
 COUNCIL ACCEPTANCE DATE: Thursday, July 08, 2021
 ONE-YEAR WARRANTY DATE: Thursday, July 07, 2022

Water Infrastructure	Quantity
6-inch in LF	235.00
6-inch Valves	1
2-inch in LF	563.00
2-inch Valves	4
8-inch in LF	725.00
8-inch Valves	2
Hydrants	4

Sanitary Sewer Infrastructure	Quantity
8-inch in LF	1320.00
Manholes as EA	5



MEMORADUM

DATE: Tuesday, June 01, 2021
 TO: Sue Hyde, Director of Engineering
 FROM: Gary Stansbury, Construction Manager
 SUBJECT: Infrastructure Acceptance
 PROJECT NAME: Slatebrooks Sewer Extension- Midland
 PROJECT NUMBER: 2009-042
 DEVELOPER: R.L. Wallace Construction Co., Inc.
 FINAL CERTIFICATION - LOT NUMBERS: Site
 INFRASTRUCTURE TYPE: Water
 COUNCIL ACCEPTANCE DATE: Thursday, July 08, 2021
 ONE-YEAR WARRANTY DATE: Thursday, July 07, 2022

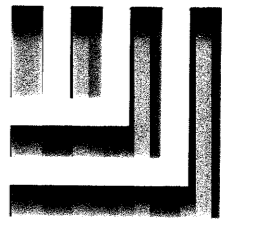
Water Infrastructure	Quantity
6-inch in LF	22.00
6-inch Valves	1



MEMORADUM

DATE: Thursday, June 8, 2021
 TO: Sue Hyde, Director of Engineering
 FROM: Gary Stansbury, Construction Manager
 SUBJECT: Roadway Acceptance
 PROJECT NAME: Wayforth at Concord PH 1, 2 & 3
 PROJECT NUMBER: 2008-061
 DEVELOPER: Wayforth at Concord, LLC
 COUNCIL ACCEPTANCE DATE: Thursday, July 8, 2021
 ONE-YEAR WARRANTY DATE: Thursday, July 7, 2022

Street	Length in LF	ROW Width	Plat
Wayforth Road NW	767 LF	60.00	PH 1
Villa Court NW	345 LF	50.00	PH 1
Wayforth Road NW	879 LF	60.00	PH 2
Woodward Way NW	852 LF	50.00	PH 3
Doan Drive NW	499 LF	50.00	PH 3
TOTAL	3,342 LF		



McADAMS

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

www.mcadamsco.com

OWNER

WAYFORTH AT CONCORD LLC 1111 KANE CONCOURSE SUITE 302 BAY HARBOR ISLANDS, FLORIDA 33154

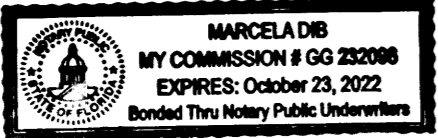
THE WAYFORTH AT CONCORD PITTS SCHOOL ROAD NW & WEDDINGTON ROAD NO. 2 TOWNSHIP CABARRUS COUNTY, CONCORD, NORTH CAROLINA

CERTIFICATE OF OWNERSHIP AND OFFER OF DEDICATION

I hereby certify that I am owner of the property shown and described hereon, which is located in the subdivision jurisdiction of the City of Concord, and that I hereby submit this plan of subdivision with my free consent, establish minimum building setback lines, and dedicate to public use all areas shown on this plan as streets, sidewalks, greenways, rights of way, easements, and/or open space and/or parks, except any of those uses specifically indicated as private, and I further dedicate all sanitary sewer, stormwater drainage and water lines that are located in any public utility easement or right of way and certify that I will maintain all such areas until accepted by the City of Concord, and further that I hereby guarantee that I will correct defects or failure of improvements in such areas for a period of one year commencing after final acceptance of required improvements. Any streets indicated as private shall be open to public use, but shall be privately maintained. Said dedication shall be irrevocable provided dedications of easements for storm drainage, whether indicated as private or public, are not made to the City of Concord but are irrevocably made to the subsequent owners of any and all properties shown hereon for their use and benefit unless specifically designated a drainage easement to the City of Concord.

BY: _____ Owner _____ Date _____

NORTH CAROLINA PROBATE CABARRUS COUNTY ... I, Marcela Dib, a NOTARY PUBLIC for said county and state, do hereby certify that ... My commission expires: 10/25/22

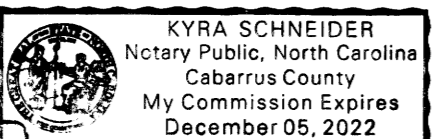


CERTIFICATE OF CONFORMITY WITH PLANS AND SPECIFICATIONS

The Wayforth at Concord ... I hereby certify, to the best of my knowledge and belief, that all street, storm drainage, water and sewer work to be performed on this subdivision has been checked by me or my authorized representative and conforms with lines, grades, cross-sections, dimensions, and material requirements which are shown on and indicated in the plans which have been reviewed and approved by the Concord Subdivision Administrator or the North Carolina Department of Transportation.

I also acknowledge that falsification of the above certifications may subject me to civil suit and/or criminal prosecution under the General Statutes, including but not limited to, G.S. 136-102.6 and the Code of Ordinances of the City of Concord.

REGISTERED PROFESSIONAL ENGINEER ... NORTH CAROLINA CABARRUS COUNTY ... I, Kyra Schneider, a NOTARY PUBLIC for said county and state, do hereby certify that Robert M. Reddick, Jr. personally appeared before me this day and acknowledged the due execution of the foregoing instrument.



FILED Aug 15, 2019 03:17 pm ... EXCISE TAX \$0.00

I, KEVIN S. BAUCOM, CERTIFY THAT THIS PLAN WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAN WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. ... I HEREBY CERTIFY THAT THIS PLAN IS OF THE FOLLOWING TYPE: G.S. 47-30 (f)(11)(a). THIS SURVEY CREATES SUBDIVISION OF LAND WITHIN THE AREA OF A COUNTY OR MUNICIPALITY THAT HAS AN ORDINANCE THAT REGULATES PARCELS OF LAND.



CERTIFICATE OF FINAL PLAT APPROVAL

I hereby certify that this plat is in compliance with the City of Concord Code of Ordinances. This final plat for the Wayforth Subdivision was approved by the Concord Planning & Zoning Commission / Administrator with the concurrence of the Development Review Committee at their meeting on August 24, 2019. 8/14/19 Date

CERTIFICATE OF ACCEPTANCE OF OFFER OF DEDICATION

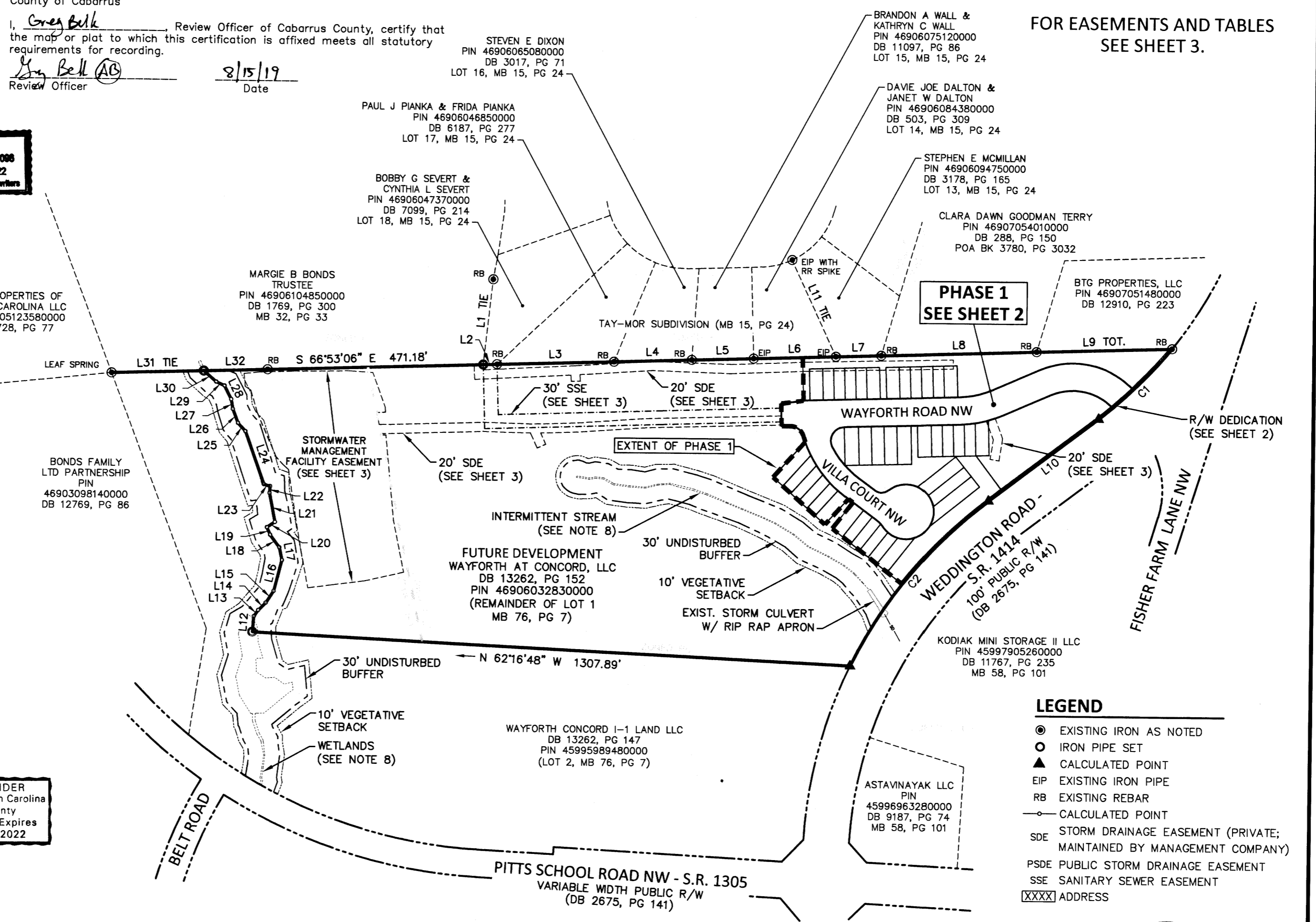
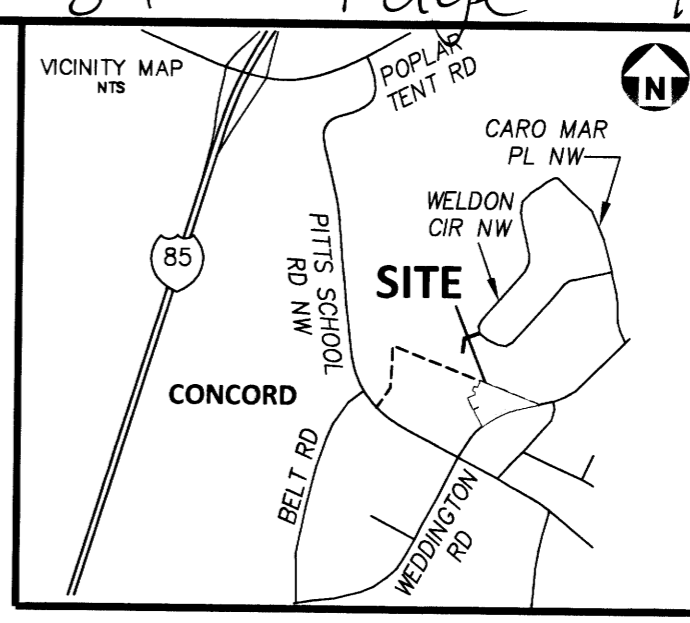
I hereby certify that the City Council accepted the offers of dedication shown on this plat by resolution at a meeting of the City Council held on June 13, 2019. 8/15/2019 Date

PLAT REVIEW OFFICER CERTIFICATE

State of North Carolina County of Cabarrus ... I, Greg Bell, Review Officer of Cabarrus County, certify that the map or plat to which this certification is affixed meets all statutory requirements for recording. 8/15/19 Date

GENERAL NOTES

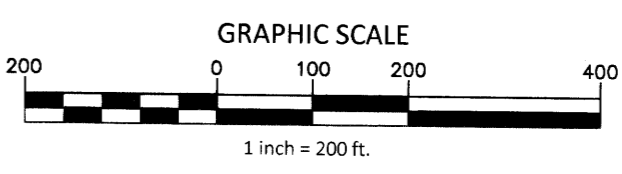
- 1.) THIS IS A SURVEY OF AN EXISTING PARCEL OF LAND. THIS IS A SUBDIVISION PLAT.
2.) BEARINGS FOR THIS SURVEY ARE BASED ON NC GRID NAD83 (2011).
3.) ALL DISTANCES ARE HORIZONTAL GROUND DISTANCES.
4.) ZONING: PUD
BUILDING SET BACKS: FRONT 25 (MAJOR ROAD); 20' (MINOR ROAD) UNLESS OTHERWISE NOTED
SIDE 20' MINIMUM BUILDING SEPARATION
REAR 10' MINIMUM
MAX. BUILDING HEIGHT: 35'
5.) FLOOD NOTE: THIS PROPERTY IS NOT LOCATED IN A SPECIAL FLOOD HAZARD ZONE. IT IS LOCATED IN ZONE "X" AS DEFINED BY FEMA F.I.R.M. MAP NUMBER 3710469000J, DATED NOVEMBER 5, 2008.
6.) REFERENCES: ALTA/NSPS LAND TITLE SURVEY ENTITLED "VILLAS AT CONCORD," PREPARED BY THE JOHN R. McADAMS COMPANY INC., DATED NOVEMBER 9, 2018; DEED BOOK 13262, PAGE 152; PLAT BOOK 76, PAGE 7, BOTH OF THE CABARRUS COUNTY REGISTRY. PIN: 46906032830000
7.) NO GRID MONUMENTS FOUND WITHIN 2000' OF SITE
8.) JURISDICTIONAL STREAMS/WETLANDS WERE MARKED BY CAROLINA WETLAND SERVICES ON DECEMBER 12, 2017.



FOR EASEMENTS AND TABLES SEE SHEET 3.

PHASE 1 SEE SHEET 2

LEGEND table with symbols for existing iron, iron pipe set, calculated points, easements, etc.



CERTIFICATE OF STREETS, WATER, AND SEWER SYSTEM APPROVAL AND OTHER IMPROVEMENTS ... I hereby certify that all publicly maintained streets, storm drainage systems, water and sewer systems and other publicly maintained improvements and any privately maintained water quality 'Best Management Practice' shown on this plan have been designed and installed, or their installation guaranteed, in an acceptable manner and according to specification and standards of Concord and the State of North Carolina. 8/14/19 Date

CERTIFICATE OF FEE PAYMENT ... I hereby certify that all fees for The Wayforth at Concord subdivision have been paid, or that the fees are not applicable. 8/15/19 Date

REVISIONS

Table with columns for NO., DATE, and description of revisions.

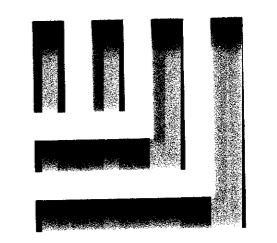
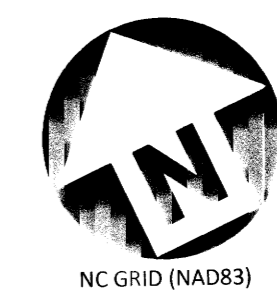
PLAN INFORMATION

Table with project details: PROJECT NO., FILENAME, CHECKED BY, DRAWN BY, SCALE, DATE.

SHEET

TOWNHOME PLAT PHASE 1

1-3

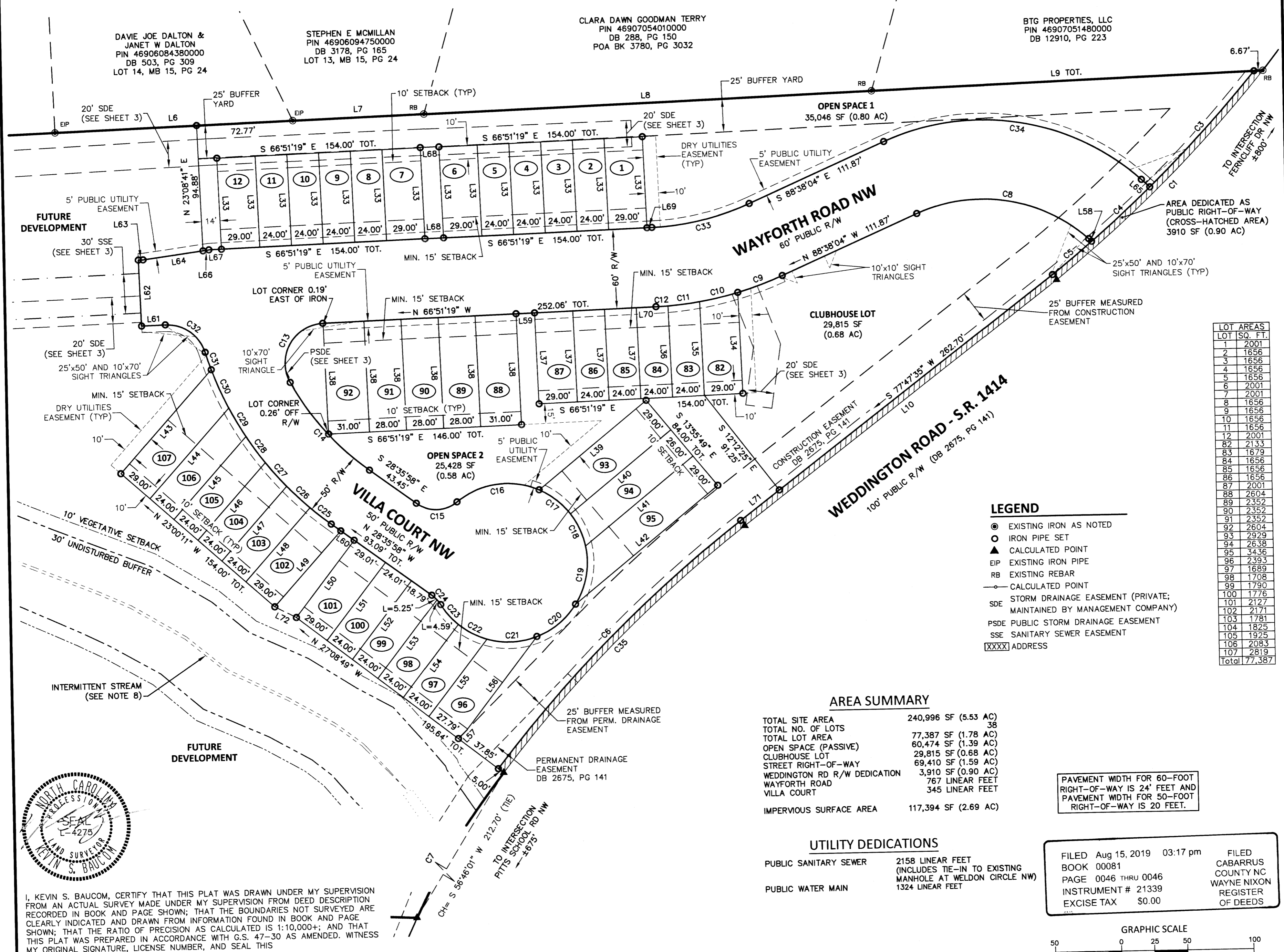


McADAMS

The John R. McAdams Company, Inc.
 3430 Toringdon Way
 Suite 110
 Charlotte, NC 28277
 phone 704.527.0800
 fax 919.361.2269
 license number: C-0293
 www.mcadamsco.com

OWNER
 WAYFORTH AT CONCORD LLC
 1111 KANE CONCOURSE
 SUITE 302
 BAY HARBOR ISLANDS, FLORIDA 33154

THE WAYFORTH AT CONCORD PITTS SCHOOL ROAD NW & WEDDINGTON ROAD NO. 2 TOWNSHIP CABARRUS COUNTY, CONCORD, NORTH CAROLINA



LOT	SQ. FT.
1	2001
2	1656
3	1656
4	1656
5	1656
6	2001
7	2001
8	1656
9	1656
10	1656
11	1656
12	2001
13	2133
14	1679
15	1656
16	1656
17	2001
18	2604
19	2352
20	2352
21	2352
22	2604
23	2929
24	2638
25	3436
26	2393
27	1689
28	1708
29	1790
30	1776
31	2127
32	2171
33	1781
34	1825
35	1925
36	2083
37	2819
Total	77,387

LEGEND

- EXISTING IRON AS NOTED
- IRON PIPE SET
- ▲ CALCULATED POINT
- EIP EXISTING IRON PIPE
- RB EXISTING REBAR
- CALCULATED POINT
- SDE STORM DRAINAGE EASEMENT (PRIVATE; MAINTAINED BY MANAGEMENT COMPANY)
- PSDE PUBLIC STORM DRAINAGE EASEMENT
- SSE SANITARY SEWER EASEMENT
- XXXX ADDRESS

AREA SUMMARY

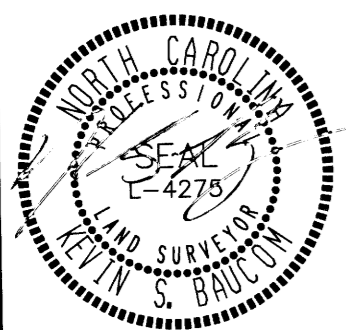
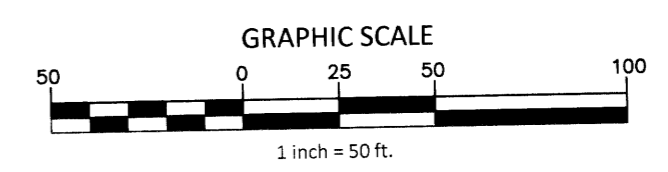
TOTAL SITE AREA	240,996 SF (5.53 AC)
TOTAL NO. OF LOTS	38
TOTAL LOT AREA	77,387 SF (1.78 AC)
OPEN SPACE (PASSIVE)	60,474 SF (1.39 AC)
CLUBHOUSE LOT	29,815 SF (0.68 AC)
STREET RIGHT-OF-WAY	69,410 SF (1.59 AC)
WAYFORTH RD R/W DEDICATION	3,910 SF (0.90 AC)
VILLA COURT	767 LINEAR FEET
IMPERVIOUS SURFACE AREA	117,394 SF (2.69 AC)

UTILITY DEDICATIONS

PUBLIC SANITARY SEWER	2158 LINEAR FEET (INCLUDES TIE-IN TO EXISTING MANHOLE AT WELDON CIRCLE NW)
PUBLIC WATER MAIN	1324 LINEAR FEET

PAVEMENT WIDTH FOR 60-FOOT RIGHT-OF-WAY IS 24' FEET AND PAVEMENT WIDTH FOR 50-FOOT RIGHT-OF-WAY IS 20 FEET.

FILED Aug 15, 2019 03:17 pm FILED CABARRUS COUNTY NC
 BOOK 00081 WAYNE NIXON REGISTER OF DEEDS
 PAGE 0046 THRU 0046
 INSTRUMENT # 21339
 EXCISE TAX \$0.00



I, KEVIN S. BAUCUM, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER, AND SEAL THIS

24th DAY OF July, A.D. 2019.
 KEVIN S. BAUCUM, PLS L-4275

FOR VICINITY MAP, NOTES AND CERTIFICATIONS SEE SHEET 1.
 FOR EASEMENTS AND TABLES SEE SHEET 3.

CERTIFICATE OF OWNERSHIP AND OFFER OF DEDICATION

I hereby certify that I am owner of the property shown and described hereon, which is located in the subdivision jurisdiction of the City of Concord, and that I hereby submit this plan of subdivision with my free consent, establish minimum building setback lines, and dedicate to public use all areas shown on this plan as streets, sidewalks, greenways, rights of way, easements, and/or open space and/or parks, except any of those uses specifically indicated as private, and I further dedicate all sanitary sewer, stormwater drainage and water lines that are located in any public utility easement or right of way and certify that I will maintain all such areas until accepted by the City of Concord, and further that I hereby guarantee that I will correct defects or failure of improvements in such areas for a period of one year commencing after final acceptance of required improvements. Any streets indicated as private shall be open to public use, but shall be privately maintained. Said dedication shall be irrevocable provided dedications of easements for storm drainage, whether indicated as private or public, are not made to the City of Concord but are irrevocably made to the subsequent owners of any and all properties shown hereon for their use and benefit unless specifically designated a drainage easement to the City of Concord.

By: [Signature] Owner Date 11/19/19

NORTH CAROLINA CABARRUS COUNTY, Kyra Schneider, a NOTARY PUBLIC for said county and state, do hereby certify that John Balchus personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

WITNESS my hand and official seal, this the 20th day of November, 2019.

My commission expires: December 5, 2022. Notary Public Kyra Schneider

CERTIFICATE OF FINAL PLAT APPROVAL

I hereby certify that this plat is in compliance with the City of Concord Code of Ordinances. This final plat for the Wayforth at Concord Subdivision was approved by the Concord Planning & Zoning Commission / Administrator with the concurrence of the Development Review Committee at their meeting on 12/19/19.

12/19/19 Date Planning and Neighborhood Services Director or Designee

CERTIFICATE OF ACCEPTANCE OF OFFER OF DEDICATION

I hereby certify that the City Council accepted the offers of dedication shown on this plat by resolution at a meeting of the City Council held on 12-9-19.

12-9-19 Date City Clerk

PLAT REVIEW OFFICER CERTIFICATE

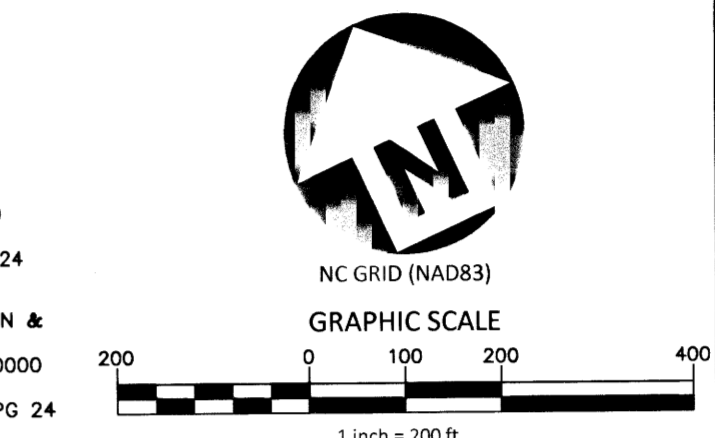
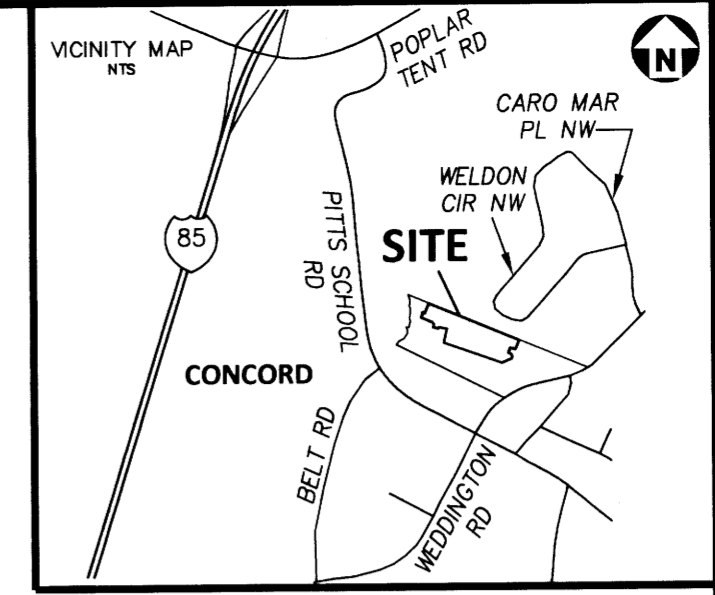
State of North Carolina County of Cabarrus

I, Greg Belk, Review Officer of Cabarrus County, certify that the map or plat to which this certification is affixed meets all statutory requirements for recording.

12/10/19 Date Review Officer

GENERAL NOTES

- 1.) THIS IS A SURVEY OF AN EXISTING PARCEL OF LAND. THIS IS A SUBDIVISION PLAT.
2.) BEARINGS FOR THIS SURVEY ARE BASED ON NC GRID NAD83 (2011).
3.) ALL DISTANCES ARE HORIZONTAL GROUND DISTANCES.
4.) ZONING: PUD
BUILDING SET BACKS: FRONT 25 (MAJOR ROAD); 20' (MINOR ROAD) UNLESS OTHERWISE NOTED
SIDE 20' MINIMUM BUILDING SEPARATION
REAR 10' MINIMUM
..... 35'
MAX. BUILDING HEIGHT:
5.) FLOOD NOTE: THIS PROPERTY IS NOT LOCATED IN A SPECIAL FLOOD HAZARD ZONE. IT IS LOCATED IN ZONE 'X' AS DEFINED BY FEMA F.I.R.M. MAP NUMBERS 3710469000K AND 3710459900K, DATED NOVEMBER 16, 2018.
6.) REFERENCES: ALTA/NSPS LAND TITLE SURVEY ENTITLED 'VILLAS AT CONCORD,' PREPARED BY THE JOHN R. MCADAMS COMPANY INC., DATED NOVEMBER 9, 2018; DEED BOOK 13262, PAGE 152; PLAT BOOK 76, PAGE 7; PLAT BOOK 81, PAGE 45, ALL OF THE CABARRUS COUNTY REGISTRY. PIN: 46906032830000
7.) NO GRID MONUMENTS FOUND WITHIN 2000' OF SITE
8.) JURISDICTIONAL STREAMS/WETLANDS WERE MARKED BY CAROLINA WETLAND SERVICES ON DECEMBER 12, 2017.



CERTIFICATE OF CONFORMITY WITH PLANS AND SPECIFICATIONS

The Wayforth at Concord Name of Subdivision
Wayforth Road NW Name of Streets in Subdivision
Wayforth at Concord LLC Subdivider

I hereby certify, to the best of my knowledge and belief, that all street, storm drainage, water and sewer work to be performed on this subdivision has been checked by me or my authorized representative and conforms with lines, grades, cross-sections, dimensions, and material requirements which are shown on and indicated in the plans which have been reviewed and approved by the Concord Subdivision Administrator or the North Carolina Department of Transportation.

I also acknowledge that falsification of the above certifications may subject me to civil suit and/or criminal prosecution under the General Statutes, including but not limited to, G.S. 14-100 and G.S. 136-102.6 and the Code of Ordinances of the City of Concord.

REGISTERED PROFESSIONAL ENGINEER #085742 DATE 11/19/19

NORTH CAROLINA CABARRUS COUNTY, Kyra Schneider, a NOTARY PUBLIC for said county and state, do hereby certify that Robert M. Reddick, Jr. personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

WITNESS my hand and official seal, this the 20th day of November, 2019.

My commission expires: December 5, 2022. Notary Public Kyra Schneider

I, KEVIN S. BAUCOM, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER, AND SEAL THIS 4th DAY OF November, A.D. 2019.

KEVIN S. BAUCOM, PLS L-4275

I HEREBY CERTIFY THAT THIS PLAT IS OF THE FOLLOWING TYPE: G.S. 47-30 (f)(1)(a). THIS SURVEY CREATES SUBDIVISION OF LAND WITHIN THE AREA OF A COUNTY OR MUNICIPALITY THAT HAS AN ORDINANCE THAT REGULATES PARCELS OF LAND.



FILED Dec 10, 2019 08:57 am BOOK 00082 PAGE 0067 THRU 0067 INSTRUMENT # 34282 EXCISE TAX \$0.00

FILED CABARRUS COUNTY NC WAYNE NIXON REGISTER OF DEEDS

TCB PROPERTIES OF NORTH CAROLINA LLC DB 46905123580000 DB 6728, PG 77

MARGIE B BONDS TRUSTEE DB 1769, PG 300 MB 32, PG 33

BOBBY G SEVERT & CYNTHIA L SEVERT DB 7099, PG 214 LOT 18, MB 15, PG 24

STEVEN E DIXON DB 3017, PG 71 LOT 16, MB 15, PG 24

PAUL J PIANKA & FRIDA PIANKA DB 6187, PG 277 LOT 17, MB 15, PG 24

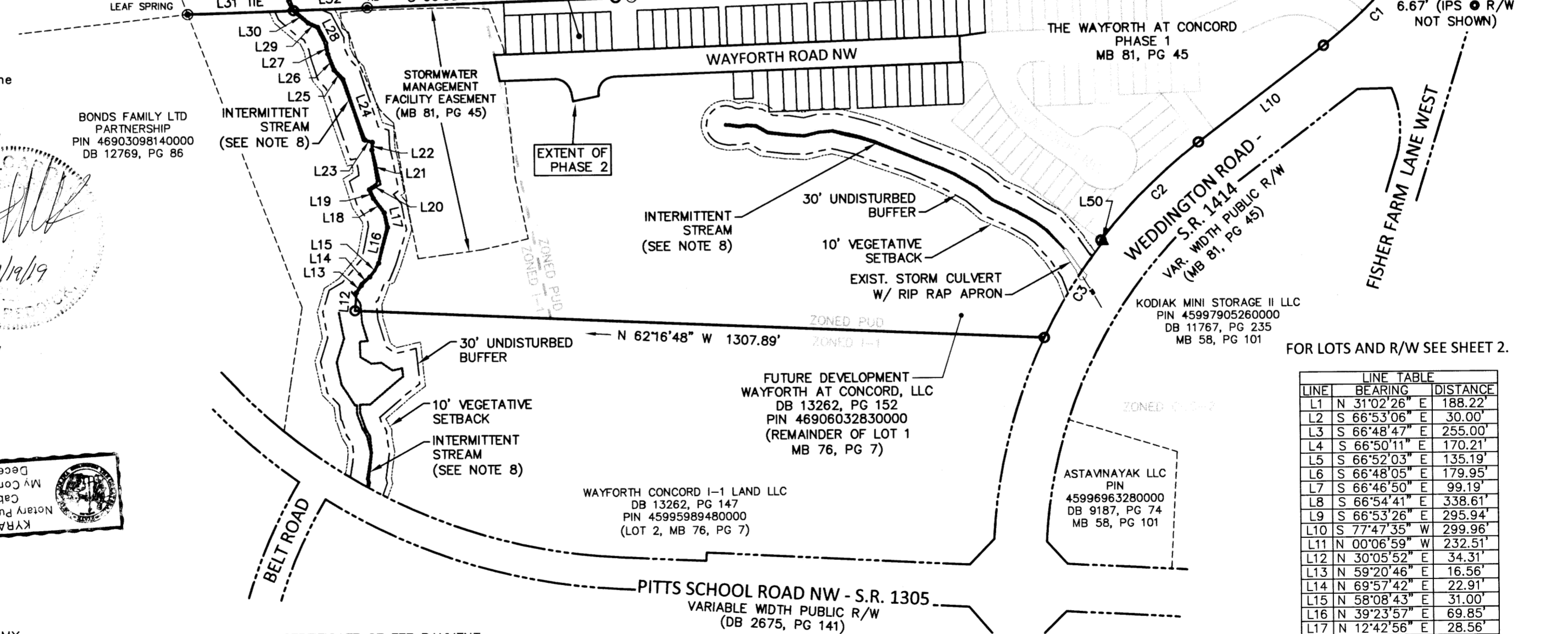
BRANDON A WALL & KATHRYN C WALL DB 11097, PG 86 LOT 15, MB 15, PG 24

DAVE JOE DALTON & JANET W DALTON DB 503, PG 309 LOT 14, MB 15, PG 24

STEPHEN E MCMILLAN DB 3178, PG 165 LOT 13, MB 15, PG 24

CLARA DAWN GOODMAN TERRY DB 288, PG 150 POA BK 3780, PG 3032

BTG PROPERTIES, LLC DB 12910, PG 223



FOR LOTS AND R/W SEE SHEET 2.

LINE TABLE with columns: LINE, BEARING, DISTANCE. Lists lines L1 through L32 with their respective bearings and distances.

CURVE TABLE with columns: CURVE, LENGTH, RADIUS, CHORD BEARING, CHORD. Lists curves C1, C2, and C3 with their respective dimensions.

CERTIFICATE OF FEE PAYMENT

I hereby certify that all fees for The Wayforth at Concord subdivision have been paid, or that the fees are not applicable.

12/9/19 Date Finance Director

CERTIFICATE OF STREETS, WATER, AND SEWER SYSTEM APPROVAL AND OTHER IMPROVEMENTS

I hereby certify that all publicly maintained streets, storm drainage systems, water and sewer systems and other publicly maintained improvements and any privately maintained water quality Best Management Practice shown on this plat have been designed and installed, or their installation guaranteed, in an acceptable manner and according to specification and standards of Concord and the State of North Carolina.

12/15/19 Date Director of Engineering

LEGEND

- EXISTING IRON AS NOTED
IRON PIPE SET
CALCULATED POINT
EXISTING IRON PIPE
EXISTING REBAR
CALCULATED POINT
STORM DRAINAGE EASEMENT (PRIVATE-MAINTAINED BY MANAGEMENT COMPANY)
PUBLIC STORM DRAINAGE EASEMENT
SANITARY SEWER EASEMENT
ADDRESS
DRY UTILITIES EASEMENT

McADAMS logo and contact information for The John R. McAdams Company, Inc. including address, phone, and website.

OWNER WAYFORTH AT CONCORD LLC 1111 KANE CONCOURSE SUITE 302 BAY HARBOR ISLANDS, FLORIDA 33154

THE WAYFORTH AT CONCORD CONCORD NORTH CAROLINA
PITTS SCHOOL ROAD NW & WEDDINGTON ROAD
NO. 2 TOWNSHIP
CABARRUS COUNTY, CONCORD, NORTH CAROLINA

REVISIONS table, PLAN INFORMATION (PROJECT NO. SLO-17000, FILENAME SLO17000-F3-Rev), and SHEET TOWNHOME PLAT PHASE 2 1-2.



NC GRID (NAD83)

MARGIE B BONDS TRUSTEE
PIN 46906104850000
DB 1769, PG 300
MB 32, PG 33

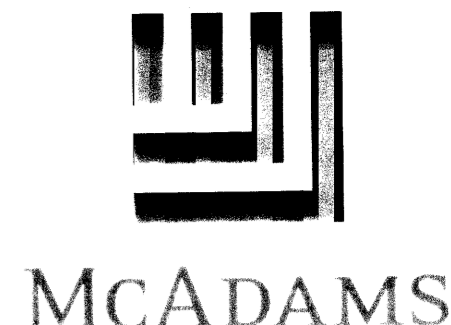
BOBBY G SEVERT &
CYNTHIA L SEVERT
PIN 46906047370000
DB 7099, PG 214
LOT 18, MB 15, PG 24

PAUL J PIANKA & FRIDA PIANKA
PIN 46906046850000
DB 6187, PG 277
LOT 17, MB 15, PG 24

STEVEN E DIXON
PIN 46906065080000
DB 3017, PG 71
LOT 16, MB 15, PG 24

BRANDON A WALL &
KATHRYN C WALL
PIN 46906075120000
DB 11097, PG 86
LOT 15, MB 15, PG 24

DAVIE JOE DALTON &
JANET W DALTON
PIN 46906084380000
DB 503, PG 309
LOT 14, MB 15, PG 24



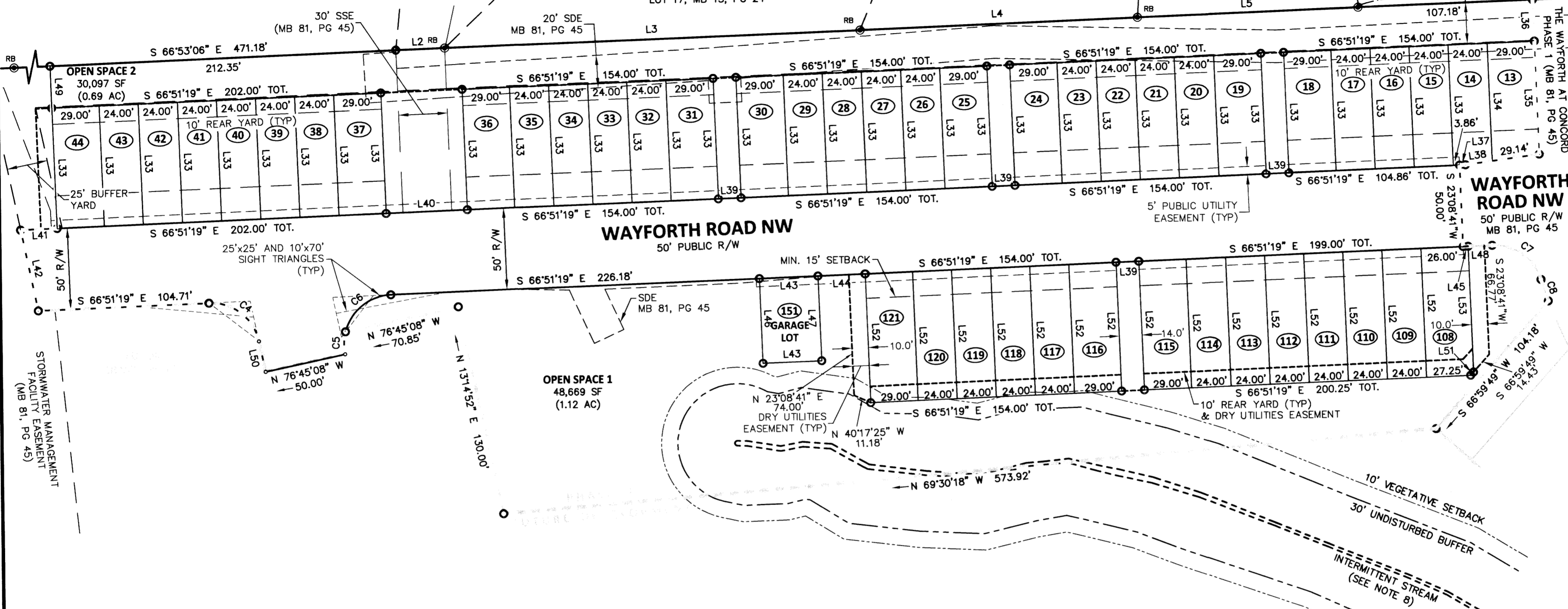
The John R. McAdams Company, Inc.
3430 Toringdon Way
Suite 110
Charlotte, NC 28277
phone 704.527.0800
fax 919.361.2269
license number: C-0293

www.mcadamsco.com

OWNER

WAYFORTH AT CONCORD LLC
1111 KANE CONCOURSE
SUITE 302
BAY HARBOR ISLANDS, FLORIDA 33154

**THE WAYFORTH AT
CONCORD**
PITTS SCHOOL ROAD NW &
WEDDINGTON ROAD
NO. 2 TOWNSHIP
CABARRUS COUNTY, CONCORD, NORTH CAROLINA



LEGEND

- EXISTING IRON AS NOTED
- IRON PIPE SET
- ▲ CALCULATED POINT
- EIP EXISTING IRON PIPE
- RB EXISTING REBAR
- CALCULATED POINT
- SDE STORM DRAINAGE EASEMENT (PRIVATE-MAINTAINED BY MANAGEMENT COMPANY)
- PSDE PUBLIC STORM DRAINAGE EASEMENT
- SSE SANITARY SEWER EASEMENT
- XXXX ADDRESS
- DRY UTILITIES EASEMENT

LINE	BEARING	DISTANCE
L33	S 23°08'41" W	74.00'
L34	S 23°08'41" W	72.35'
L35	S 23°08'41" W	69.45'
L36	S 23°08'41" W	25.43'
L37	S 66°51'19" E	3.61'
L38	S 72°33'57" E	16.61'
L39	S 66°51'19" E	14.00'
L40	S 66°51'19" E	49.92'
L41	S 66°51'19" E	22.38'
L42	S 13°14'52" W	50.76'
L43	S 66°51'19" E	36.00'
L44	S 66°51'19" E	28.87'
L45	S 66°51'19" E	3.00'
L46	S 23°08'41" W	52.00'
L47	N 23°08'41" E	52.00'
L49	N 23°08'41" E	25.62'
L50	N 13°14'52" E	19.19'
L51	N 66°59'49" E	2.53'
L52	S 23°08'41" W	79.00'
L53	S 23°08'41" W	77.18'

LOT	SQ. FT.	LOT	SQ. FT.
13	2,056	108	2,289
14	1,762	109	1,896
15	1,776	110	1,896
16	1,776	111	1,896
17	1,776	112	1,896
18	2,146	113	1,896
19	2,146	114	1,896
20	1,776	115	2,291
21	1,776	116	2,291
22	1,776	117	1,896
23	1,776	118	1,896
24	2,146	119	1,896
25	2,146	120	1,896
26	1,776	121	2,291
27	1,776	122	2,291
28	1,776	123	1,896
29	1,776	124	1,896
30	2,146	125	1,896
31	2,146	126	1,896
32	1,776	127	1,896
33	1,776	128	1,896
34	1,776	129	1,896
35	1,776	130	1,896
36	2,146	131	1,896
37	2,146	132	1,896
38	1,776	133	1,896
39	1,776	134	1,896
40	1,776	135	1,896
41	1,776	136	1,896
42	1,776	137	1,896
43	1,776	138	1,896
44	2,146	139	1,896

CURVE	LENGTH	RADIUS	CHORD	BEARING	CHORD
C4	41.94'	30.00'	S 26°48'14" E	38.61'	
C5	13.91'	30.00'	N 26°31'36" E	13.78'	
C6	38.40'	30.00'	N 76°28'31" E	35.83'	
C7	39.34'	30.00'	S 29°17'24" E	36.58'	
C8	13.92'	255.00'	S 06°42'41" W	13.92'	

AREA SUMMARY

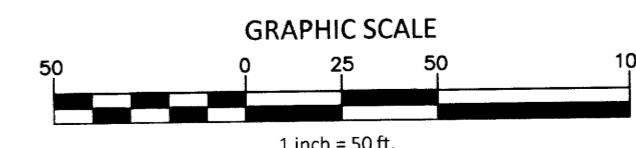
TOTAL SITE AREA	215,543 SF (4.95 AC)
TOTAL NO. OF LOTS	47
TOTAL LOT AREA	90,422 SF (2.08 AC)
OPEN SPACE (PASSIVE)	78,766 SF (1.81 AC)
STREET RIGHT-OF-WAY	446,356 SF (1.06 AC)
WAYFORTH ROAD	879 LINEAR FEET

IMPERVIOUS SURFACE AREA 98,538 SF (2.26 AC)

PAVEMENT WIDTH FOR 60-FOOT RIGHT-OF-WAY IS 24' FEET AND PAVEMENT WIDTH FOR 50-FOOT RIGHT-OF-WAY IS 20 FEET.

UTILITY DEDICATIONS

PUBLIC SANITARY SEWER	252 LINEAR FEET
PUBLIC WATER MAIN	964 LINEAR FEET



I, KEVIN S. BAUCOM, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER, AND SEAL THIS



DAY OF November, A.D. 2019.

KEVIN S. BAUCOM, PLS L-4275

FILED Dec 10, 2019 08:57 am
BOOK 00082
PAGE 0068 THRU 0068
INSTRUMENT # 34283
EXCISE TAX \$0.00

FILED
CABARRUS COUNTY NC
WAYNE NIXON
REGISTER OF DEEDS

FOR VICINITY MAP, NOTES AND CERTIFICATIONS SEE SHEET 1.

CERTIFICATE OF FEE PAYMENT

I hereby certify that all fees for The Wayforth at Concord subdivision have been paid, or that the fees are not applicable.

Finance Director

CERTIFICATE OF OWNERSHIP AND OFFER OF DEDICATION

I hereby certify that I am an owner of the property shown and described hereon, which is located in the subdivision jurisdiction of the City of Concord, and that I hereby submit this plan of subdivision with my free consent, establish minimum building setback lines, and dedicate to public use all areas shown on this plat as streets, sidewalks, greenways, rights of way, easements, and/or open space and/or parks, except any of those uses specifically indicated as private, and I further dedicate all sanitary sewer, stormwater drainage and water lines that are located in any public utility easement or right of way and certify that I will maintain all such areas until accepted by the City of Concord, and further that I hereby guarantee that I will correct defects or failure of improvements in such areas for a period of one year commencing after final acceptance of required improvements.

BY: [Signature] Date: 01/03/20

NORTH CAROLINA CABARRUS COUNTY

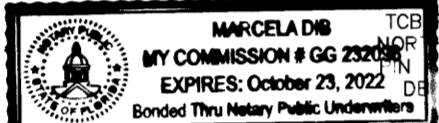
I, MARCELA DIS, a NOTARY PUBLIC for said county and state, do hereby certify that

MOELLS KAPLAN personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

WITNESS my hand and official seal, this the 3rd day of April, 2020

My commission expires: 10/23/22

Notary Public



CERTIFICATE OF CONFORMITY WITH PLANS AND SPECIFICATIONS

THE WAYFORTH AT CONCORD Name of Subdivision

DOAN DRIVE NW AND WOODARD WAY NW Name of Streets in Subdivision

THE WAYFORTH AT CONCORD LLC Subdivider

I hereby certify, to the best of my knowledge and belief, that all street, storm drainage, water and sewer work to be performed on this subdivision has been checked by me or my authorized representative and conforms with lines, grades, cross-sections, dimensions, and material requirements which are shown on and indicated in the plans which have been reviewed and approved by the Concord Subdivision Administrator or the North Carolina Department of Transportation.

I also acknowledge that falsification of the above certifications may subject me to civil suit and/or criminal prosecution under the General Statutes including but not limited to, G.S. 14-100 and G.S. 136-102.6 and the Code of Ordinances of the City of Concord.

REGISTERED PROFESSIONAL ENGINEER #035742 DATE 4/1/2020 REGISTRATION NO. DATE

NORTH CAROLINA CABARRUS COUNTY

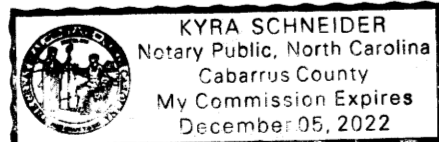
I, KYRA SCHNEIDER, a NOTARY PUBLIC for said county and state,

do hereby certify that [Signature] personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

WITNESS my hand and official seal, this the 1st day of April, 2020

My commission expires: December 5, 2022

Notary Public



I, KEVIN S. BAUCOM, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER, AND SEAL THIS

3/5 DAY OF March A.D. 2020.

KEVIN S. BAUCOM, PLS L-4275

CERTIFICATE OF FINAL PLAT APPROVAL

I hereby certify that this plat is in compliance with the City of Concord Code of Ordinances.

This final plat for the Wayforth Subdivision was approved by the Concord Zoning Commission / Administrator with the concurrence of the Development Review Committee at their meeting on

Apr 14 2020 Planning and Neighborhood Services Director or Designee Date

CERTIFICATE OF ACCEPTANCE OF OFFER OF DEDICATION

I hereby certify that the City Council accepted the offers of dedication shown on this plat by resolution at a meeting of the City Council held on

Jan. 9 2020 City Clerk Date

PLAT REVIEW OFFICER CERTIFICATE

State of North Carolina County of Cabarrus

I, Greg Bell, Review Officer of Cabarrus County, certify that the map or plat to which this certification is affixed meets all statutory requirements for recording.

Greg Bell Date 04/22/2020 Review Officer Date

CERTIFICATE OF STREETS, WATER, AND SEWER SYSTEM APPROVAL AND OTHER IMPROVEMENTS

I hereby certify that all publicly maintained streets, storm drainage systems, water and sewer systems and other publicly maintained improvements and any privately maintained water quality Best Management Practices shown on this plat have been designed and installed, or their installation guaranteed, in an acceptable manner and according to specification and standards of Concord and the State of North Carolina.

M. Sue Hyde Date 4/20/2020 Director of Engineering Date

PROPERTIES OF CAROLINA LLC DB 1905123580000 E: 1,495,437.60'

CERTIFICATE OF CONFORMITY WITH PLANS AND SPECIFICATIONS

THE WAYFORTH AT CONCORD Name of Subdivision

DOAN DRIVE NW AND WOODARD WAY NW Name of Streets in Subdivision

THE WAYFORTH AT CONCORD LLC Subdivider

I hereby certify, to the best of my knowledge and belief, that all street, storm drainage, water and sewer work to be performed on this subdivision has been checked by me or my authorized representative and conforms with lines, grades, cross-sections, dimensions, and material requirements which are shown on and indicated in the plans which have been reviewed and approved by the Concord Subdivision Administrator or the North Carolina Department of Transportation.

I also acknowledge that falsification of the above certifications may subject me to civil suit and/or criminal prosecution under the General Statutes including but not limited to, G.S. 14-100 and G.S. 136-102.6 and the Code of Ordinances of the City of Concord.

REGISTERED PROFESSIONAL ENGINEER #035742 DATE 4/1/2020 REGISTRATION NO. DATE

NORTH CAROLINA CABARRUS COUNTY

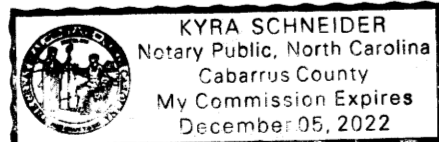
I, KYRA SCHNEIDER, a NOTARY PUBLIC for said county and state,

do hereby certify that [Signature] personally appeared before me this day and acknowledged the due execution of the foregoing instrument.

WITNESS my hand and official seal, this the 1st day of April, 2020

My commission expires: December 5, 2022

Notary Public



I, KEVIN S. BAUCOM, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER, AND SEAL THIS

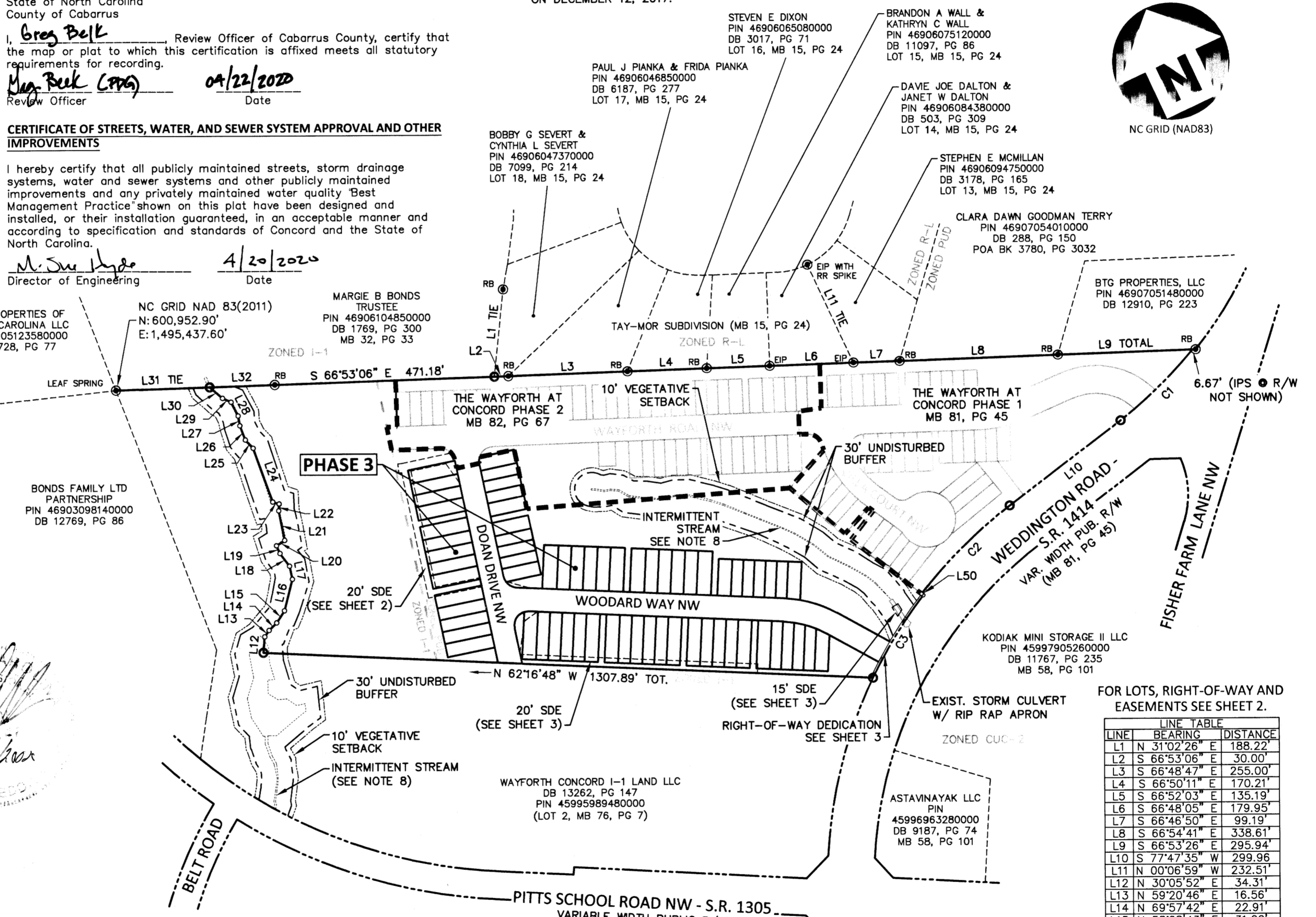
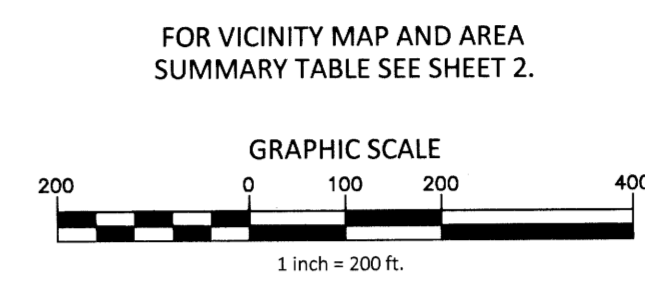
3/5 DAY OF March A.D. 2020.

KEVIN S. BAUCOM, PLS L-4275

GENERAL NOTES

- 1.) THIS IS A SURVEY OF AN EXISTING PARCEL OF LAND. THIS IS A SUBDIVISION PLAT.
2.) BEARINGS FOR THIS SURVEY ARE BASED ON NC GRID NAD83 (2011).
3.) ALL DISTANCES ARE HORIZONTAL GROUND DISTANCES.
4.) ZONING: PUD
BUILDING SET BACKS: FRONT 25 (MAJOR ROAD); 20' (MINOR ROAD) UNLESS OTHERWISE NOTED
SIDE 20' MINIMUM BUILDING SEPARATION
REAR 10' MINIMUM
..... 35'
MAX. BUILDING HEIGHT:
FLOOD NOTE: THIS PROPERTY IS NOT LOCATED IN A SPECIAL FLOOD HAZARD ZONE. IT IS LOCATED IN ZONE 'X' AS DEFINED BY FEMA F.I.R.M. MAP NUMBERS 371046900K AND 3710459900K, DATED NOVEMBER 16, 2018.
REFERENCES:
ALTA/NSPS LAND TITLE SURVEY ENTITLED 'VILLAS AT CONCORD,' PREPARED BY THE JOHN R. MCADAMS COMPANY INC., DATED NOVEMBER 9, 2018; DEED BOOK 13262, PAGE 152; PLAT BOOK 76, PAGE 7, BOTH OF THE CABARRUS COUNTY REGISTRY. PIN: 46906032830000
7.) NO GRID MONUMENTS FOUND WITHIN 2000' OF SITE
8.) JURISDICTIONAL STREAMS WERE MARKED BY CAROLINA WETLAND SERVICES ON DECEMBER 12, 2017.

NC DEPARTMENT OF TRANSPORTATION DIVISION OF HIGHWAYS
I HEREBY CERTIFY THAT THE RIGHT OF WAY DEDICATION ALONG THE EXISTING STATE MAINTAINED ROADWAY(S) SHOWN ON THIS PLAT IS APPROVED AND ACCEPTED AS PUBLIC RIGHT OF WAY BY THE NORTH CAROLINA DEPARTMENT OF TRANSPORTATION, DIVISION OF HIGHWAYS.
DISTRICT ENGINEER [Signature] DATE 4/9/2020
ONLY NORTH CAROLINA DEPARTMENT OF TRANSPORTATION APPROVED STRUCTURES ARE TO BE CONSTRUCTED ON PUBLIC RIGHT-OF-WAY



FOR LOTS, RIGHT-OF-WAY AND EASEMENTS SEE SHEET 2.

Table with columns: LINE, BEARING, DISTANCE. Lists line data for L1 through L32.

Table with columns: CURVE, LENGTH, RADIUS, CHORD, BEARING, CHORD. Lists curve data for C1, C2, C3.

FILED Apr 22, 2020 01:14 pm BOOK 00084 PAGE 0007 THRU 0007 INSTRUMENT # 12007 EXCISE TAX \$0.00

FILED CABARRUS COUNTY NC WAYNE NIXON REGISTER OF DEEDS

LEGEND

- EXISTING IRON AS NOTED
IRON PIPE SET
CALCULATED POINT
EXISTING IRON PIPE
EXISTING REBAR
STORM DRAINAGE EASEMENT (PRIVATE; MAINTAINED BY MANAGEMENT COMPANY)
PUBLIC STORM DRAINAGE EASEMENT
SANITARY SEWER EASEMENT
DRY UTILITIES EASEMENT
STORM DRAINAGE EASEMENT

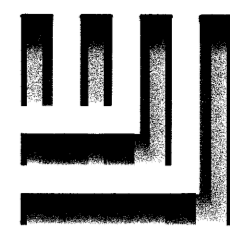


McADAMS The John R. McAdams Company, Inc. 3430 Toringdon Way Suite 110 Charlotte, NC 28277 phone 704. 527. 0800 fax 919. 361. 2269 license number: C-0293 www.mcadamsco.com

OWNER WAYFORTH AT CONCORD LLC 1111 KANE CONCOURSE SUITE 302 BAY HARBOR ISLANDS, FLORIDA 33154

THE WAYFORTH AT CONCORD CONCORD PITTS SCHOOL ROAD NW & WEDDINGTON ROAD NO. 2 TOWNSHIP CABARRUS COUNTY, CONCORD, NORTH CAROLINA

REVISIONS NO. DATE
PLAN INFORMATION PROJECT NO. SLO-17000 FILENAME SLO17000-F4 CHECKED BY KSB DRAWN BY JC SCALE 1"=200' DATE 3.4.2020 SHEET TOWNHOME PLAT PHASE 3 1-3



McADAMS

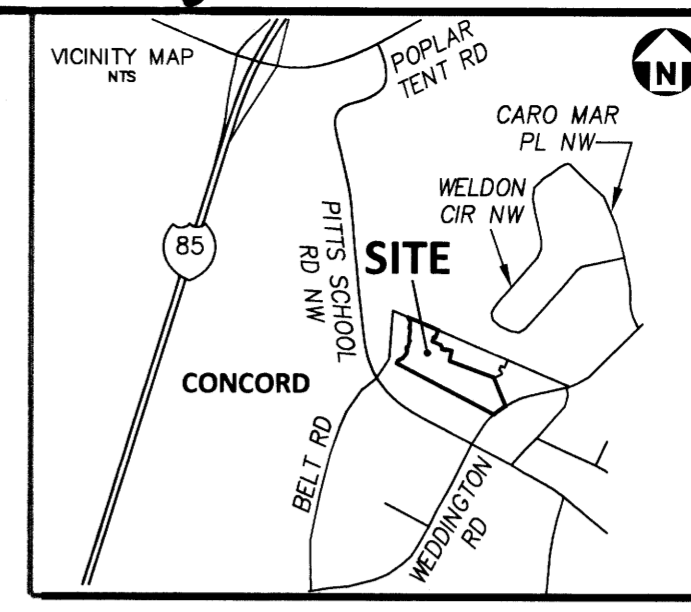
The John R. McAdams Company, Inc.
 3430 Toringdon Way
 Suite 110
 Charlotte, NC 28277
 phone 704. 527. 0800
 fax 919. 361. 2269
 license number: C-0293

www.mcadamsco.com

OWNER

WAYFORTH AT CONCORD LLC
 1111 KANE CONCOURSE
 SUITE 302
 BAY HARBOR ISLANDS, FLORIDA 33154

**THE WAYFORTH AT
 CONCORD**
 PITTS SCHOOL ROAD NW &
 WEDDINGTON ROAD
 NO. 2 TOWNSHIP
 CABARRUS COUNTY, CONCORD, NORTH CAROLINA



LOT NO.	LOT AREA (SQ. FT.)	LOT NO.	LOT AREA (SQ. FT.)
45	2,987	122	2,277
46	2,678	123	1,896
47	2,678	124	1,896
48	2,987	125	1,896
49	2,987	126	2,291
50	2,678	127	2,291
51	2,678	128	1,896
52	2,678	129	1,896
53	2,987	130	1,896
54	2,987	131	2,280
55	2,678		
56	2,678		
57	2,678		
58	2,987		

LEGEND

- EXISTING IRON AS NOTED
- IRON PIPE SET
- ▲ CALCULATED POINT
- EIP EXISTING IRON PIPE
- RB EXISTING REBAR
- SDE STORM DRAINAGE EASEMENT (PRIVATE; MAINTAINED BY MANAGEMENT COMPANY)
- PSDE PUBLIC STORM DRAINAGE EASEMENT
- SSE SANITARY SEWER EASEMENT
- DRY UTILITIES EASEMENT
- STORM DRAINAGE EASEMENT

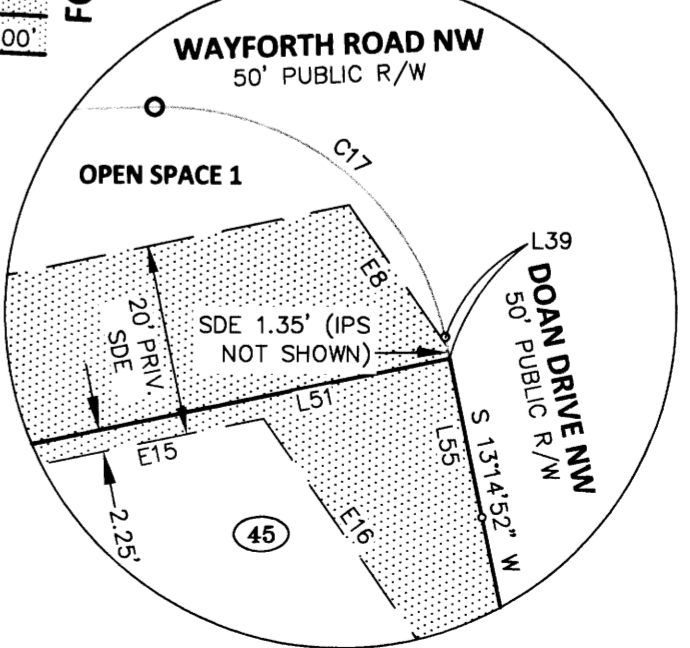
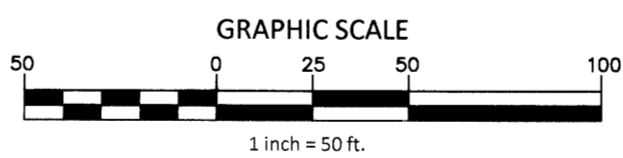
AREA SUMMARY

TOTAL SITE AREA	563,690 SF (12.94 AC)
TOTAL NO. OF LOTS	66
TOTAL LOT AREA	169,075 SF (3.88 AC)
OPEN SPACE (PASSIVE)	331,189 SF (7.60 AC)
STREET RIGHT-OF-WAY	63,427 SF (1.46 AC)
WEDDINGTON RD R/W DEDICATION	1,048 SF (0.02 AC)
WOODARD WAY NW	852 LINEAR FEET
DOAN DRIVE NW	499 LINEAR FEET
IMPERVIOUS SURFACE AREA	178,088 SF (4.09 AC)

UTILITY DEDICATIONS

PUBLIC SANITARY SEWER	1181 LINEAR FEET
PUBLIC WATER MAIN	1396 LINEAR FEET

PAVEMENT WIDTH FOR 60-FOOT RIGHT-OF-WAY IS 24' FEET AND PAVEMENT WIDTH FOR 50-FOOT RIGHT-OF-WAY IS 20 FEET.



FILED Apr 22, 2020 01:14 pm
 CABARRUS COUNTY, NC
 WAYNE NIXON REGISTER OF DEEDS
 BOOK 00084
 PAGE 0008 THRU 0008
 INSTRUMENT # 12008
 EXCISE TAX \$0.00

REVISIONS

NO.	DATE

PLAN INFORMATION

PROJECT NO.	SLO-17000
FILENAME	SLO17000-F4
CHECKED BY	KSB
DRAWN BY	JC
SCALE	AS SHOWN
DATE	3.4.2020

SHEET

**TOWNHOME PLAT
 PHASE 3**

2-3

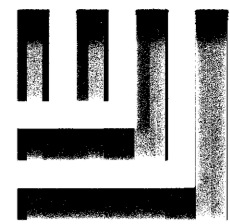
I, KEVIN S. BAUCOM, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER, AND SEAL THIS

3/15 DAY OF March A.D. 2020.

KEVIN S. BAUCOM, PLS L-4275



FOR NOTES AND CERTIFICATIONS SEE SHEET 1.
 FOR TABLES SEE SHEET 3.



McADAMS

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

www.mcadamsco.com

OWNER
WAYFORTH AT CONCORD LLC
1111 KANE CONCOURSE
SUITE 302
BAY HARBOR ISLANDS, FLORIDA 33154

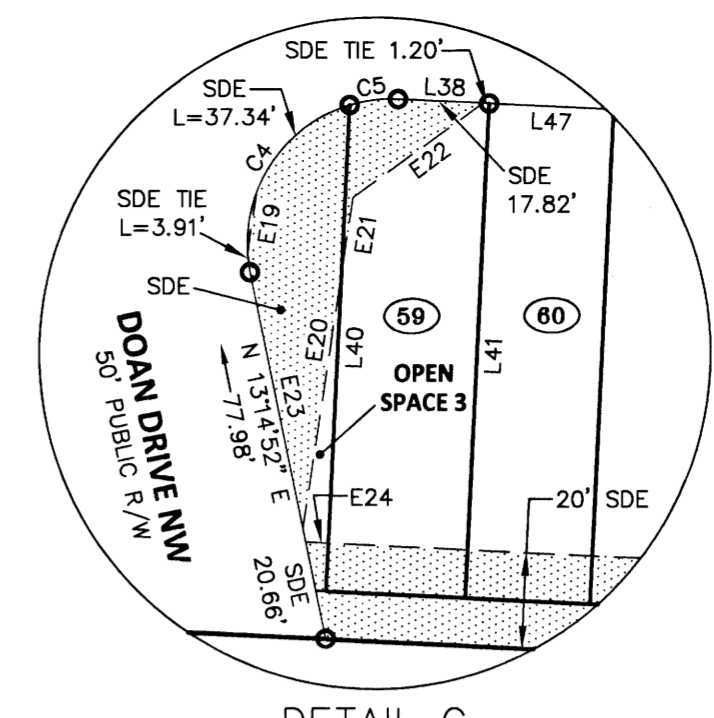
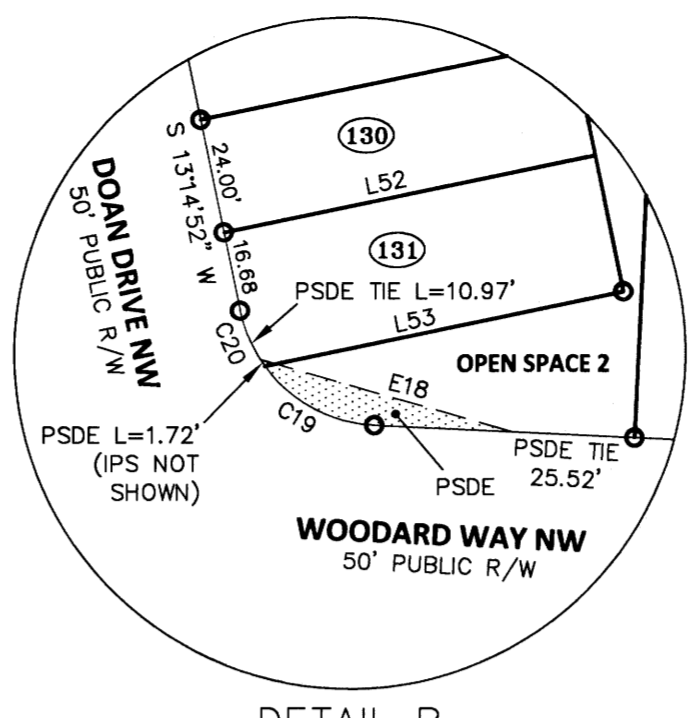
THE WAYFORTH AT CONCORD
CONCORD
PITTS SCHOOL ROAD NW &
WEDDINGTON ROAD
NO. 2 TOWNSHIP
CABARRUS COUNTY, CONCORD, NORTH CAROLINA

REVISIONS
NO. DATE

PLAN INFORMATION
PROJECT NO. SLO-17000
FILENAME SLO17000-F4
CHECKED BY KSB
DRAWN BY JC
SCALE AS SHOWN
DATE 3.4.2020

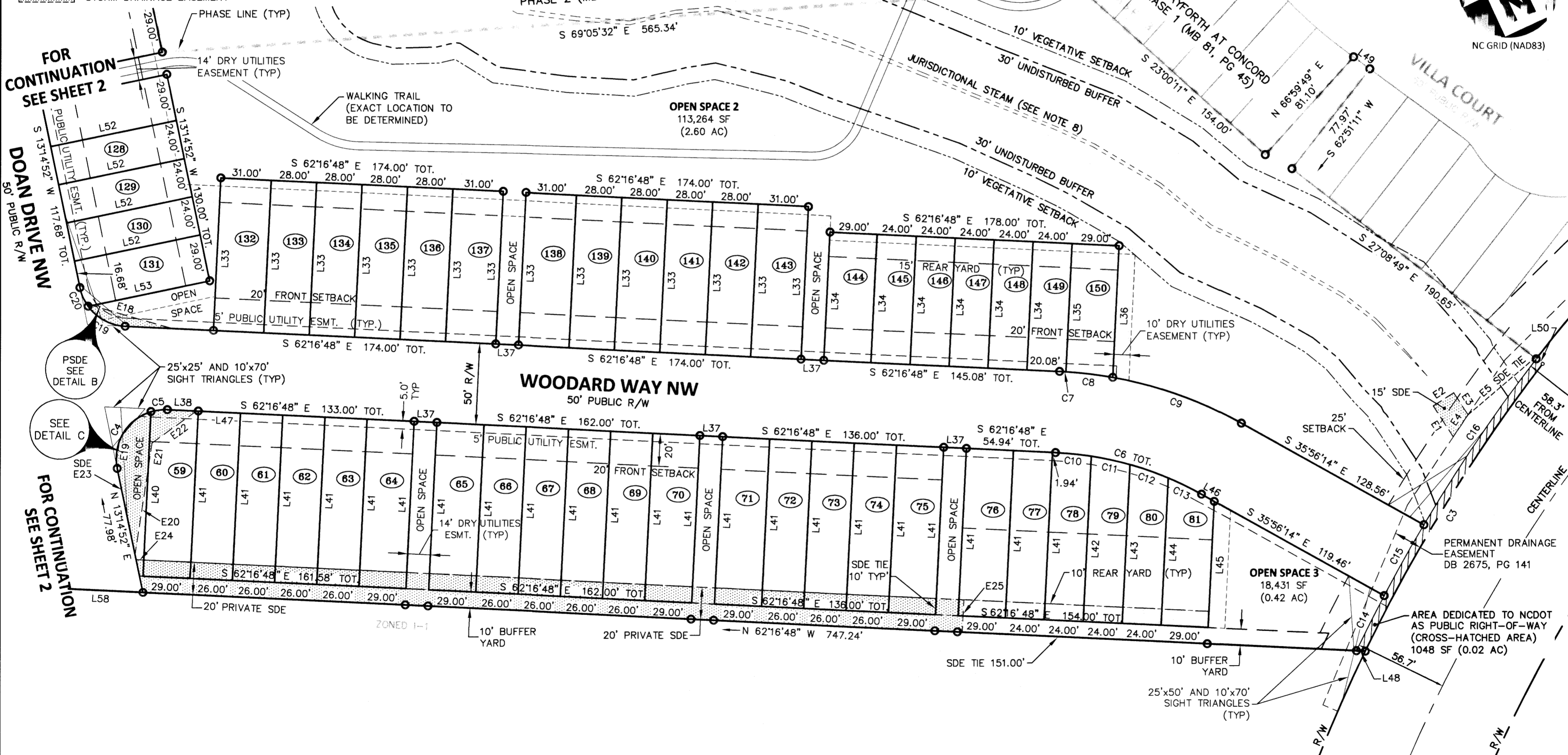
TOWNHOME PLAT
PHASE 3
3-3

LOT AREAS		LOT AREAS		LINE TABLE			CURVE TABLE					EASEMENT LINE TABLE			
LOT	SQ. FT.	LOT	SQ. FT.	LINE	BEARING	DISTANCE	CURVE	LENGTH	RADIUS	CHORD	BEARING	CHORD	LINE	BEARING	DISTANCE
59	2,981	132	2,914	L33	N 27°43'12" E	94.00'	C4	44.53'	30.00'	N 55°46'15" E	40.55'	E1	N 07°53'17" W	22.59'	
60	2,678	133	2,632	L34	N 27°43'12" E	79.00'	C5	10.17'	30.00'	S 71°59'35" E	10.12'	E2	N 82°06'43" E	15.00'	
61	2,678	134	2,632	L35	N 27°43'12" E	79.00'	C6	94.25'	205.00'	S 49°06'31" E	93.42'	E3	S 07°53'17" E	16.15'	
62	2,678	135	2,632	L36	N 27°43'12" E	81.13'	C7	3.92'	255.00'	S 61°50'20" E	3.92'	E4	S 58°52'15" W	16.32'	
63	2,678	136	2,632	L37	S 62°16'48" E	14.00'	C8	29.09'	255.00'	S 58°07'47" E	29.08'	E5	N 74°38'14" E	59.06'	
64	2,987	137	2,914	L38	S 62°16'48" E	19.02'	C9	84.22'	255.00'	S 45°23'58" E	83.84'	E6	S 71°24'17" E	9.25'	
65	2,987	138	2,914	L39	S 13°14'52" W	2.25'	C10	22.11'	205.00'	S 59°11'27" E	22.09'	E7	S 76°45'08" E	104.96'	
66	2,678	139	2,632	L40	N 27°43'12" E	101.29'	C11	24.35'	205.00'	S 52°41'54" E	24.34'	E8	S 09°59'45" E	17.85'	
67	2,678	140	2,632	L41	N 27°43'12" E	103.00'	C12	25.04'	205.00'	S 45°47'43" E	25.03'	E9	S 19°18'35" W	20.00'	
68	2,678	141	2,632	L42	N 27°43'12" E	101.81'	C13	22.75'	205.00'	S 39°06'59" E	22.74'	E10	S 71°24'17" E	6.35'	
69	2,678	142	2,632	L43	N 27°43'12" E	97.76'	C14	37.96'	1009.93'	N 51°38'55" E	37.96'	E11	S 13°14'52" W	275.13'	
70	2,987	143	2,914	L44	N 27°43'12" E	90.66'	C15	50.01'	1009.93'	N 54°08'37" E	50.00'	E12	S 76°45'08" E	14.00'	
71	2,987	144	2,291	L45	N 27°43'12" E	77.70'	C16	123.32'	1009.93'	N 59°03'37" E	123.23'	E13	S 76°45'08" E	103.00'	
72	2,678	145	1,896	L46	S 35°56'14" E	9.03'	C17	41.94'	30.00'	S 26°48'14" E	38.61'	E14	S 76°45'08" E	97.00'	
73	2,678	146	1,896	L47	S 62°16'48" E	19.14'	C18	13.91'	30.00'	N 26°31'36" E	13.78'	E15	S 76°45'08" E	76.78'	
74	2,678	147	1,896	L48	N 62°16'48" W	5.43'	C19	26.85'	30.00'	S 36°38'15" W	25.97'	E16	S 09°59'45" E	29.11'	
75	2,987	148	1,896	L49	S 28°35'58" E	12.41'	C20	12.69'	30.00'	S 01°07'35" W	12.60'	E17	S 09°59'45" E	22.13'	
76	2,987	149	1,896	L50	S 27°08'49" E	5.00'					E18	S 48°56'53" E	54.68'		
77	2,472	150	2,314	L51	S 76°45'08" E	103.00'					E19	N 33°33'30" E	13.34'		
78	2,463			L52	N 76°45'08" W	79.00'					E20	N 33°33'30" E	53.80'		
79	2,401			L53	N 76°45'08" W	76.35'					E21	N 33°33'30" E	15.85'		
80	2,267			L54	N 66°51'19" W	22.38'					E22	N 79°08'36" E	33.50'		
81	2,452			L55	S 13°14'52" W	16.94'					E23	N 13°14'52" E	54.41'		
				L56	S 13°14'52" W	14.00'					E24	S 62°16'48" E	4.74'		
				L57	S 13°14'52" W	33.91'					E25	S 27°43'12" W	20.00'		
				L58	N 62°16'48" W	51.64'									

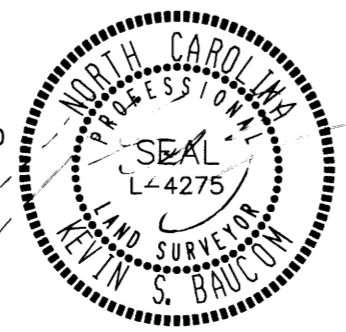


- LEGEND**
- EXISTING IRON AS NOTED
 - IRON PIPE SET
 - ▲ CALCULATED POINT
 - EIP EXISTING IRON PIPE
 - RB EXISTING REBAR
 - SDE STORM DRAINAGE EASEMENT (PRIVATE; MAINTAINED BY MANAGEMENT COMPANY)
 - PSDE PUBLIC STORM DRAINAGE EASEMENT
 - SSE SANITARY SEWER EASEMENT
 - DRY UTILITIES EASEMENT
 - STORM DRAINAGE EASEMENT

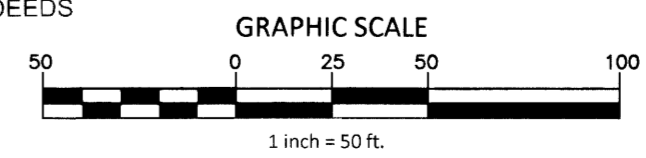
PAVEMENT WIDTH FOR 60-FOOT RIGHT-OF-WAY IS 24' FEET AND PAVEMENT WIDTH FOR 50-FOOT RIGHT-OF-WAY IS 20' FEET.



I, KEVIN S. BAUCOM, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION FROM DEED DESCRIPTION RECORDED IN BOOK AND PAGE SHOWN; THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AND DRAWN FROM INFORMATION FOUND IN BOOK AND PAGE SHOWN; THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; AND THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER, AND SEAL THIS
3/5 DAY OF March A.D. 2020.
KEVIN S. BAUCOM, PLS L-4275



FILED Apr 22, 2020 01:14 pm
BOOK 00084
PAGE 0009 THRU 0009
INSTRUMENT # 12009
EXCISE TAX \$0.00
FILED CABARRUS COUNTY NC
WAYNE NIXON
REGISTER OF DEEDS



FOR NOTES AND CERTIFICATIONS SEE SHEET 1.

AN ORDINANCE TO AMEND FY 2021-2022 BUDGET ORDINANCE

WHEREAS, the City Council of the City of Concord, North Carolina did on the 10th day of June, 2021, adopt a City budget for the fiscal year beginning July 1, 2021 and ending on June 30, 2022, as amended; and

WHEREAS, it is appropriate to amend the expense/expenditures and the revenue accounts in the funds listed for the reason stated;

NOW, THEREFORE, BE IT ORDAINED by the City Council of the City of Concord that in accordance with the authority contained in G.S. 159-15, the following accounts are hereby amended as follows:

		<u>Revenues</u>		
<u>Account</u>	<u>Title</u>	<u>Current Budget</u>	<u>Amended Budget</u>	<u>(Decrease) Increase</u>
215-4703210	EHV Funding	\$0	\$223,308	223,308
<i>Total Revenue Increase (Decrease)</i>				<u>223,308</u>

		<u>Expenses/Expenditures</u>		
<u>Account</u>	<u>Title</u>	<u>Current Budget</u>	<u>Amended Budget</u>	<u>(Decrease) Increase</u>
2150-5471506	EHV Expenditure	\$0	\$223,308	223,308
<i>Total Exp Increase (Decrease)</i>				<u>223,308</u>

Reason: For the award of Emergency Housing Vouchers.

Adopted this 8th day of July, 2021.

CITY COUNCIL
CITY OF CONCORD
NORTH CAROLINA

William C. Dusch, Mayor

ATTEST: _____
Kim Deason, City Clerk

Valerie Kolczynski, City Attorney

**Outstanding Debt of the City of Concord
30-Jun-21**

Series	Revenue Bonds Description	6/30/2021 Principal Outstanding	Final Maturity	Avg Coupon	Use of Proceeds	FYE 2022 Principal Due	FYE 2022 Interest Due
Series 2012	Utility System Revenue Bonds-Refunding	\$9,865,000	12/1/2028	4.080%	Water/Electric	\$1,060,000	\$341,956
Series 2019	Utility System Revenue Bonds-Refunding	\$4,418,000	12/1/2022	1.670%	Water/Electric/Sewer	\$2,191,000	\$55,486
Series 2016	Utility System Revenue Bonds-Refunding	\$17,560,000	12/1/2035	4.684%	Water/Electric/Sewer	\$820,000	\$812,500
TOTAL		<u>\$31,843,000</u>		<u>4.337%</u>		<u>\$4,071,000</u>	<u>\$1,209,942</u>

Series	Non General Obligation Debt Description	6/30/2021 Balance Outstanding	Final Maturity	Interest Rates	Use of Proceeds	FYE 2022 Principal Due	FYE 2022 Interest Due
Series 2014A	Limited Obligation	\$20,675,000	6/1/2034	2.0% to 5%	**Building/Telecommunication	\$1,495,000	\$863,781
11/10/2015	Installment Purchase	\$3,919,000	5/1/2030	2.420%	Parking Facility-Aviation	\$395,000	\$94,840
10/11/2017	Installment Purchase Refunding 07 IPA	\$4,081,874	6/30/2028	2.040%	***Aviation/Fire Station	\$670,912	\$79,822
10/8/2019	Installment Purchase	\$819,000	10/1/2029	2.630%	Airport Hangar	\$91,000	\$20,343
3/10/2021	Installment Purchase	\$6,200,000	3/1/1931	1.430%	Fire Station 12	\$620,000	\$86,444
11/15/2004	Installment Purchase	\$768,750	11/15/2024	5.010%	Aviation-Hendrick Hangar	\$225,000	\$33,348
TOTAL		<u>\$36,463,624</u>				<u>\$3,496,912</u>	<u>\$1,178,578</u>
		<u>\$68,306,624</u>				<u>\$7,567,912</u>	<u>\$2,388,520</u>

* Streets, Aviation, Parks, Fire Building, Parking, Equipment

** City Hall, Police HQ, Telecommunication Equip.

*** Land, Hangar, N Taxiway, Fuel Farm, Fire Station 9

Notes

2014 LOBS refunded the 2005 COPS

2017 IPA refunding 2008 IPA

2016 Utility Revenue Bonds refunded 2008 bonds

2019 Utility Revenue Bonds refunded 2009B bonds

Tax Report for Fiscal Year 2020-2021**FINAL REPORT****May****Property Tax Receipts- Munis**

2020 BUDGET YEAR	139,992.93
2019	40,821.57
2018	5,066.27
2017	1,097.57
2016	344.87
2015	352.42
2014	352.42
2013	352.42
2012	352.42
2011	360.70
Prior Years	341.80
Interest	19,196.48
Refunds	
	<hr/>
	208,631.87

Vehicle Tax Receipts- County

2020 BUDGET YEAR	432,668.43
2019	
2018	
2017	
2016	
2015	
2014	
Prior Years	90.35
Penalty & Interest	4,558.12
Refunds	
	<hr/>
	437,316.90

Fire District Tax - County

2019 BUDGET YEAR	2030.71
------------------	---------

Less: Collection Fee from County

Net Ad Valorem Collections	<hr/>
	647,979.48

423:Vehicle Tag Fee-Transportation Impr Fund 34,830.83

100:Vehicle Tag Fee 34,830.82

292:Vehicle Tag Fee-Transportation Fund 141,388.35

Less Collection Fee - Transit

Net Vehicle Tag Collection	<hr/>
	211,050.00

Privilege License 390.00

Prepaid Privilege Licenses

Privilege License interest

Total Privilege License	<hr/>
	390.00

Oakwood Cemetery current 3,850.00

Oakwood Cemetery endowment -

Rutherford Cemetery current 4,500.01

Rutherford Cemetery endowment 799.99

West Concord Cemetery current 6,849.98

West Concord Cemetery endowment 500.02

Total Cemetery Collections	<hr/>
	16,500.00

Total Collections	<hr/>
	\$ 875,919.48

Current Year	
Original Scroll	
Levy	
Penalty	
Adjustments	
Public Service	
Levy	
Penalty	
Discoveries/Annex	42,445.36
Discovery Penalty	5,719.71
Total Amount Invoiced - Monthly	<u>48,165.07</u>
Total Amount Invoiced - YTD	63,343,903.50

Current Year	
Less Abatements (Releases)	
Real	166.21
Personal	
Discovery	
Penalty - all	
Total Abatements	<u>166.21</u>

Adjusted Amount Invoiced - monthly	47,998.86
Adjusted Amount Invoiced - YTD	62,949,706.69

Current Levy Collected	139,992.93
Levy Collected from previous years	49,442.46
Penalties & Interest Collected	19,196.48
Current Month Write Off - Debit/Credit	-
Total Monthly Collected	<u>208,631.87</u>
Total Collected - YTD	63,320,046.94

Total Collected - net current levy -YTD 62,733,512.40

Percentage of Collected -current levy 99.66%

Amount Uncollected - current year levy 216,194.29

Percentage of Uncollected - current levy 0.34%

100.00%

CITY OF CONCORD

Summary of Releases, Refunds and Discoveries for the Month of May 2021

RELEASES		
CITY OF CONCORD	\$	166.21
CONCORD DOWNTOWN	\$	-

REFUNDS		
CITY OF CONCORD	\$	506.64
CONCORD DOWNTOWN	\$	-

DISCOVERIES							
CITY OF CONCORD							
TaxYear	Real	Personal	Total	Rate	Calculated	Penalties	
2016	0	204,084	204,084	0.0048	979.60	569.99	
2017	0	349,430	349,430	0.0048	1,677.26	813.30	
2018	1,395,730	531,290	1,927,020	0.0048	9,249.70	993.64	
2019	1,395,730	974,133	2,369,863	0.0048	11,375.34	1,238.57	
2020	1,486,320	2,506,067	3,992,387	0.0048	19,163.46	2,104.21	
2021	0	0	0	0.0048	0.00	0.00	
Total	4,277,780	4,565,004	8,842,784		\$ 42,445.36	\$ 5,719.71	
DOWNTOWN							
TaxYear	Real	Personal	Total	Rate	Calculated	Penalties	
2017	0	0	0	0.0023	0.00	0.00	
2018	0	0	0	0.0023	0.00	0.00	
2019	0	0	0	0.0023	0.00	0.00	
2020	0	106,350	106,350	0.0023	244.61	24.46	
Total	0	106,350	106,350		\$ 244.61	\$ 24.46	

City of Concord
Portfolio Holdings
Monthly Investments to Council
Report Format: By CUSIP / Ticker
Group By: Security Type
Average By: Cost Value
Portfolio / Report Group: All Portfolios
As of 5/31/2021

Description	CUSIP/Ticker	Face Amount/Shares	Cost Value	Maturity Date	YTM @ Cost	% of Portfolio	Settlement Date	Cost Price	Days To Maturity
Commercial Paper									
CP BCI MIAMI 0 9/20/2021	05990CWL4	5,000,000.00	4,993,611.10	9/20/2021	0.230	1.34	N/A	99.872222	112
CP CHESHAM 0 11/23/2021	16536HYP0	5,000,000.00	4,996,125.00	11/23/2021	0.150	1.34	N/A	99.9225	176
CP CHESHAM 0 7/29/2021	16536HUV1	5,000,000.00	4,994,972.20	7/29/2021	0.200	1.34	N/A	99.899444	59
CP CREDIT SUISSE 0 9/14/2021	2254EAWWE9	5,000,000.00	4,997,666.67	9/14/2021	0.140	1.34	N/A	99.953333	106
CP ING US FUNDING 0 2/14/2022	4497W1BE5	5,000,000.00	4,994,022.22	2/14/2022	0.160	1.34	N/A	99.880444	259
CP ING US FUNDING 0 6/10/2021	45685QTA7	5,000,000.00	4,994,972.22	6/10/2021	0.200	1.34	N/A	99.899444	10
CP JP MORGAN 0 10/18/2021	46640PXJ7	5,000,000.00	4,994,900.00	10/18/2021	0.170	1.34	N/A	99.898	140
CP LLOYDS BANK CORP 0 6/22/2021	53948ATN1	5,000,000.00	4,991,841.67	6/22/2021	0.220	1.34	N/A	99.836833	22
CP MACQUARIE BANK 0 8/17/2021	55607KVH6	5,000,000.00	4,995,525.00	8/17/2021	0.180	1.34	N/A	99.9105	78
CP NATIXIS NY 0 11/1/2021	63873JY12	5,000,000.00	4,995,038.90	11/1/2021	0.190	1.34	N/A	99.900778	154
CP SALVATION ARMY 0 10/14/2021	79584RXE3	5,000,000.00	4,993,875.00	10/14/2021	0.180	1.34	N/A	99.8775	136
CP TOYOTA MC0 7/23/2021	89233GUP9	5,000,000.00	4,998,181.94	7/23/2021	0.110	1.34	N/A	99.963639	53
CP TOYOTA MOTOR CREDIT 0 8/9/2021	89233GV94	5,000,000.00	4,993,648.61	8/9/2021	0.170	1.34	N/A	99.872972	70
Sub Total / Average Commercial Paper		65,000,000.00	64,934,380.53		0.177	17.40		99.899058	106
FFCB Bond									
FFCB 0.14 5/18/2023-21	3133EMZP0	5,000,000.00	4,997,000.00	5/18/2023	0.170	1.34	N/A	99.94	717
FFCB 0.19 9/22/2023-21	3133EMLE0	5,000,000.00	5,000,000.00	9/22/2023	0.190	1.34	N/A	100	844
FFCB 0.2 8/19/2022-21	3133EL4H4	5,000,000.00	5,000,000.00	8/19/2022	0.200	1.34	N/A	100	445
FFCB 0.22 7/21/2022-21	3133ELW67	5,000,000.00	4,997,500.00	7/21/2022	0.245	1.34	N/A	99.95	416
FFCB 0.23 1/19/2024	3133EMNG3	5,000,000.00	4,997,850.00	1/19/2024	0.244	1.34	N/A	99.957	963
FFCB 0.25 3/1/2024-21	3133EMSD5	5,000,000.00	4,990,000.00	3/1/2024	0.317	1.34	N/A	99.8	1,005
FFCB 0.31 11/30/2023-21	3133EMHL9	5,000,000.00	5,000,000.00	11/30/2023	0.310	1.34	N/A	100	913
FFCB 0.32 8/10/2023-21	3133EL3E2	5,000,000.00	5,000,000.00	8/10/2023	0.320	1.34	N/A	100	801
FFCB 0.43 9/10/2024-20	3133EL6V1	5,000,000.00	5,000,000.00	9/10/2024	0.430	1.34	N/A	100	1,198
FFCB 0.53 9/29/2025-21	3133EMBH4	5,000,000.00	5,000,000.00	9/29/2025	0.530	1.34	N/A	100	1,582
FFCB 0.625 6/16/2026-21	3133EMKV3	5,000,000.00	5,000,000.00	6/16/2026	0.625	1.34	N/A	100	1,842
FFCB 0.71 4/21/2025-22	3133EMWH1	5,000,000.00	5,000,000.00	4/21/2025	0.710	1.34	N/A	100	1,421
FFCB 1.04 1/25/2029-22	3133EMNL2	5,000,000.00	4,986,250.00	1/25/2029	1.076	1.34	N/A	99.725	2,796
FFCB 1.4 3/10/2028-22	3133EMSW3	5,000,000.00	5,000,000.00	3/10/2028	1.400	1.34	N/A	100	2,475
FFCB 1.5 3/23/2028-22	3133EMUB6	5,000,000.00	5,000,000.00	3/23/2028	1.500	1.34	N/A	100	2,488
FFCB 1.55 3/15/2029-22	3133EMSX1	5,000,000.00	4,960,000.00	3/15/2029	1.658	1.33	N/A	99.2	2,845
FFCB 1.55 3/30/2027-23	3133ELUN2	5,000,000.00	5,000,000.00	3/30/2027	1.550	1.34	N/A	100	2,129
FFCB 1.7 9/27/2022-21	3133EKS31	5,000,000.00	5,000,000.00	9/27/2022	1.700	1.34	N/A	100	484
FFCB 1.89 9/27/2024-21	3133EKU20	5,000,000.00	5,000,000.00	9/27/2024	1.890	1.34	N/A	100	1,215
Sub Total / Average FFCB Bond		95,000,000.00	94,928,600.00		0.793	25.44		99.925188	1,398
FHLB Bond									
FHLB 0.22 10/5/2023-21	3130AKAF3	5,000,000.00	4,992,500.00	10/5/2023	0.270	1.34	N/A	99.85	857
FHLB 0.3 11/27/2023-21	3130AKGL4	5,000,000.00	5,000,000.00	11/27/2023	0.300	1.34	N/A	100	910
FHLB 0.3 9/29/2023-21	3130AK3S3	5,000,000.00	5,000,000.00	9/29/2023	0.300	1.34	N/A	100	851
FHLB 0.375 5/24/2024-21	3130AMPB2	5,000,000.00	5,000,000.00	5/24/2024	0.375	1.34	N/A	100	1,089
FHLB 0.4 5/24/2024-21	3130AMEP3	5,000,000.00	5,000,000.00	5/24/2024	0.400	1.34	N/A	100	1,089
FHLB 0.4 7/15/2025-21	3130AKM29	5,000,000.00	4,999,000.00	7/15/2025	0.405	1.34	N/A	99.98	1,506
FHLB 0.45 4/29/2024-21	3130ALYE8	5,000,000.00	5,000,000.00	4/29/2024	0.450	1.34	N/A	100	1,064
FHLB 0.45 8/27/2024-20	3130AJZH5	5,000,000.00	5,000,000.00	8/27/2024	0.450	1.34	N/A	100	1,184
FHLB 0.5 10/20/2025-21	3130AKNK8	5,000,000.00	4,999,000.00	10/20/2025	0.504	1.34	N/A	99.98	1,603
FHLB 0.53 2/17/2026-21	3130AKWS1	5,000,000.00	4,995,000.00	2/17/2026	0.550	1.34	N/A	99.9	1,723
FHLB 0.8 3/10/2026-21	3130ALFS8	5,000,000.00	5,000,000.00	3/10/2026	0.800	1.34	N/A	100	1,744
FHLB 0.825 8/17/2027-21	3130AJXH7	5,000,000.00	4,986,250.00	8/17/2027	0.866	1.34	N/A	99.725	2,269
FHLB 1.02 3/30/2026-21	3130ALSX3	5,000,000.00	5,000,000.00	3/30/2026	1.020	1.34	N/A	100	1,764
FHLB 1.77 7/22/2024-21	3130AHWG4	5,000,000.00	5,000,000.00	7/22/2024	1.770	1.34	N/A	100	1,148
FHLB 2.32 11/1/2029-22	3130AHEU3	5,000,000.00	5,000,000.00	11/1/2029	2.320	1.34	N/A	100	3,076
FHLB 2.5 2/13/2024	3130AFW94	520,000.00	554,662.30	2/13/2024	0.225	0.15	N/A	106.665827	988

FHLB Step 1/29/2026-21	3130AKRA6	5,000,000.00	5,000,000.00	1/29/2026	1.002	1.34	N/A	100	1,704
FHLB Step 12/30/2025-21	3130AKLH7	5,000,000.00	5,000,000.00	12/30/2025	0.765	1.34	N/A	100	1,674
FHLB Step 4/29/2026-21	3130ALZA5	5,000,000.00	5,000,000.00	4/29/2026	1.432	1.34	N/A	100	1,794
Sub Total / Average FHLB Bond		90,520,000.00	90,526,412.30		0.773	24.26		100.009696	1,499
FHLMC Bond									
FHLMC 0.25 6/26/2023	3137EAES4	3,220,000.00	3,219,567.60	6/26/2023	0.254	0.86	N/A	99.986726	756
FHLMC 0.25 7/28/2022-21	3134GWAP1	5,000,000.00	5,000,000.00	7/28/2022	0.250	1.34	N/A	100	423
FHLMC 0.25 9/8/2023	3137EAEW5	2,120,000.00	2,120,844.05	9/8/2023	0.236	0.57	N/A	100.039854	830
FHLMC 0.3 12/14/2023-21	3134GXEW0	5,000,000.00	5,000,000.00	12/14/2023	0.300	1.34	N/A	100	927
FHLMC 0.3 6/30/2022-21	3134GV2M9	5,000,000.00	5,000,000.00	6/30/2022	0.300	1.34	N/A	100	395
FHLMC 0.3 9/28/2023-21	3134GWTL0	5,000,000.00	5,003,190.00	9/28/2023	0.273	1.34	N/A	100.0638	850
FHLMC 0.375 4/20/2023	3137EAEQ8	1,290,000.00	1,291,301.24	4/20/2023	0.341	0.35	N/A	100.100871	689
FHLMC 0.8 7/14/2026-21	3134GV5T1	5,000,000.00	5,000,000.00	7/14/2026	0.800	1.34	N/A	100	1,870
FHLMC 2.375 1/13/2022	3137EADB2	1,105,000.00	1,100,448.65	1/13/2022	2.523	0.29	N/A	99.588116	227
FHLMC 2.75 6/19/2023	3137EAEN5	1,225,000.00	1,317,965.25	6/19/2023	0.244	0.35	N/A	107.589	749
Sub Total / Average FHLMC Bond		33,960,000.00	34,053,316.79		0.425	9.13		100.294833	841
FNMA Bond									
FNMA 0.25 11/27/2023	3135G06H1	3,705,000.00	3,707,833.90	11/27/2023	0.223	0.99	N/A	100.076557	910
FNMA 0.28 12/29/2023-21	3135GABN0	5,000,000.00	5,000,000.00	12/29/2023	0.280	1.34	N/A	100	942
FNMA 0.3 10/27/2023-21	3136G46A6	5,000,000.00	5,000,000.00	10/27/2023	0.300	1.34	N/A	100	879
FNMA 0.31 8/17/2023-22	3136G4K51	5,000,000.00	5,000,000.00	8/17/2023	0.310	1.34	N/A	100	808
FNMA 0.4 7/20/2023-21	3136G4ZS5	5,000,000.00	5,000,000.00	7/20/2023	0.400	1.34	N/A	100	780
FNMA 0.42 7/7/2023-21	3136G4YJ6	5,000,000.00	5,000,000.00	7/7/2023	0.420	1.34	N/A	100	767
FNMA 0.43 6/30/2023-21	3136G4XS7	5,000,000.00	5,000,000.00	6/30/2023	0.430	1.34	N/A	100	760
FNMA 0.455 8/27/2024-21	3136G4Y72	5,000,000.00	5,000,000.00	8/27/2024	0.455	1.34	N/A	100	1,184
FNMA 0.55 8/19/2025-22	3136G4H63	5,000,000.00	5,000,000.00	8/19/2025	0.550	1.34	N/A	100	1,541
FNMA 0.58 8/25/2025-22	3136G4J20	5,000,000.00	5,000,000.00	8/25/2025	0.580	1.34	N/A	100	1,547
FNMA 0.7 7/14/2025-21	3136G4YH0	5,000,000.00	5,000,000.00	7/14/2025	0.700	1.34	N/A	100	1,505
FNMA 0.73 10/29/2026-21	3136G46F5	5,000,000.00	5,000,000.00	10/29/2026	0.730	1.34	N/A	100	1,977
FNMA 0.8 11/4/2027-22	3135GA2L4	5,000,000.00	5,000,000.00	11/4/2027	0.800	1.34	N/A	100	2,348
FNMA 1.375 9/6/2022	3135G0W33	300,000.00	298,497.00	9/6/2022	1.568	0.08	N/A	99.499	463
FNMA 1.875 4/5/2022	3135G0T45	2,005,000.00	1,989,331.01	4/5/2022	2.147	0.53	N/A	99.223064	309
FNMA 2 10/5/2022	3135G0T78	3,805,000.00	3,857,482.35	10/5/2022	1.511	1.03	N/A	101.379763	492
FNMA 2.25 4/12/2022	3135G0V59	960,000.00	969,734.40	4/12/2022	1.871	0.26	N/A	101.014	316
FNMA 2.375 1/19/2023	3135G0T94	1,820,000.00	1,884,180.01	1/19/2023	1.134	0.50	N/A	103.531596	598
FNMA 2.875 9/12/2023	3135G0U43	1,170,000.00	1,263,483.00	9/12/2023	0.221	0.34	N/A	107.99	834
Sub Total / Average FNMA Bond		73,765,000.00	73,970,541.67		0.614	19.82		100.292601	1,132
Local Government Investment Pool									
NCCMT LGIP	NCCMT599	51,237.17	51,237.17	N/A	0.010	0.01	N/A	100	1
NCCMT LGIP	NCCMT481	4,415,617.36	4,415,617.36	N/A	0.010	1.18	N/A	100	1
NCCMT LGIP	NCCMT271	110,398.73	110,398.73	N/A	0.010	0.03	N/A	100	1
Sub Total / Average Local Government Investment Poo		4,577,253.26	4,577,253.26		0.010	1.23		100	1
Money Market									
PINNACLE BANK MM	PINNACLE	10,192,854.59	10,192,854.59	N/A	0.150	2.73	N/A	100	1
Sub Total / Average Money Market		10,192,854.59	10,192,854.59		0.150	2.73		100	1
Total / Average		373,015,107.85	373,183,359.14		0.585	100		100.050659	1,039