

AGENDA

Catawba County Board of Commissioners Meeting
Monday, September 8, 2014, 7:00 p.m.
Robert E. Hibbitts Meeting Room, 1924 Courthouse
30 North College Avenue, Newton, NC

1. Call to Order.
2. Pledge of Allegiance to the Flag.
3. Invocation.
4. Approval of the minutes from the Board's Regular Meeting of August 18, 2014.
5. Recognition of Special Guests.
6. Public Comment for Items Not on the Agenda.
7. Presentations:
 - a. Fire Prevention Week Proclamation. *Presented to Assistant Emergency Services Director Mark Pettit.*
8. Public Hearing:
Highway 150 Corridor Plan. Presented by Planning Director Jacky Eubanks.
9. Appointments.
10. Consent Agenda:
 1. *First Amendment to July 2009 Apple Economic Development Agreement for Clarification Purposes and Solar Considerations.*
 2. *Appropriation of \$30,000 in Existing Fund Balance to Bandys Crossroads Volunteer Fire Department.*
 3. *Allocation of Funds Accumulated in Cooperative Extension Liability Accounts.*
11. Departmental Reports:
 - A. Social Services:
Work First County Plan (October 2016 – September 2019). Presented by Karen Heffner, Social Worker Supervisor III.
 - B. Tax:
 1. *Report and Settlement of 2013 Tax. Presented by Tax Collector Lori Mathes.*
 2. *Formal Presentation of the Proposed Schedule of Values, Standards and Rules for the Catawba County 2015 Revaluation. Presented by Tax Administrator Mark Logan.*
12. Other Items of Business.
13. Attorneys' Report.
14. Manager's Report.

11. Adjournment.

PERSONS WITH DISABILITIES: Individuals needing assistance should contact the County Clerk at 828-465-8990 within a reasonable time prior to the meeting. Access to the 1924 Courthouse for individuals with disabilities is at the south side ("A" Street). The elevator is located at the north end of the building. Participation in public meetings is without regard to race, creed, religion, national origin, sex, age, color, or disability.

INFOTALK/INTERNET: The Catawba County Telephone Information System will allow you to use your touch tone telephone to obtain current information on Catawba County 24 hours a day. Information is updated on a regular basis. Dial 465-8468 and INFOTALK will direct your questions with easy to understand instructions. Reach Catawba County on the Internet at <http://www.catawbacountync.gov>.

CALENDAR: There will be no other Board of Commissioners Meetings in September. The October Board of Commissioners Meetings will take place on Monday, October 6, 2014 at 9:30 a.m. and on Monday, October 20, 2014 at 7:00 p.m. These meetings will in the Robert E. Hibbitts Meeting Room in the 1924 Courthouse in Newton.



**PREVIEW OF BOARD OF COMMISSIONERS AGENDA
MONDAY, SEPTEMBER 8, 2014, 7:00 P.M.
ROBERT E. HIBBITTS MEETING ROOM
1924 COURTHOUSE, NEWTON, N.C.**



The Catawba County Board of Commissioners will hold a public hearing on a proposed Highway 150 Corridor Plan, which was designed, after two public meetings were held to hear concerns and suggestions from citizens in the corridor area, to put strategies in place to manage the future growth of the corridor, when the Board meets at 7 p.m. on Monday, September 8, 2014, at the 1924 Courthouse at 30 North College Avenue in Newton.

The Board will be formally presented with the proposed 2015 Schedule of Values, a set of standards and rules created following the study of the county's current real estate market which, after final approval by the Board, will be used to set property values effective on January 1, 2015.

The Board will also consider a proposed new Work First Plan for October 2016 through September 2019. It will consider approving a first amendment to the 2009 Apple Economic Development Agreement, which would clarify specific parcels and improvements subject to the initial agreement that related to the Apple Data Center in Maiden, in light of Apple having developed other property in the county since the 2009 agreement. The Board will consider a request from the Bandys Crossroads Volunteer Fire Department to appropriate \$30,000 of the department's existing fund balance to replace a damaged pump and tank used on a brush truck. And the Board will consider appropriating \$54,633 in accumulated Cooperative Extension fund balance to support 4-H, agriculture/local foods and food safety programs.

The Board will receive a report from the County Tax Collector on the settlement of 2013 taxes. And the Board will issue a proclamation declaring the week of October 5-11, 2014, as Fire Prevention Week.

PRESENTATION

The Board will issue a proclamation recognizing October 5-11, 2014, as Fire Prevention Week, urging Catawba County citizens to protect their homes and families by installing smoke alarms, testing those alarms every month and by having a home fire escape plan in place. This year's theme, "Working Smoke Alarms Save Lives: Test Yours Every Month" is to remind the public that they need working smoke alarms to give them time to get out safely if a fire occurs.

PUBLIC HEARING

The Board will conduct a public hearing to receive citizens' comments on the Highway 150 Corridor Plan and consider approval of the Plan and accompanying maps as recommended by the Planning Board, with the exception of not including all of the approved Village Center in the Mixed Use Corridor-Overlay.

Over the past fifteen years, Catawba County has adopted long-range planning initiatives for the purpose of providing the framework for coordinated growth and development. These plans included a countywide comprehensive plan, referred to as VisionQuest 2010 (1996), Future Forward (2003), and smaller focused plans referred to as "Small Area Plans" or SAPs. The plan most associated with the Highway 150 corridor is the Sherrills Ford SAP (February 2003).

The purpose of the Highway 150 Corridor Plan is to build on the foundation of the existing plans and develop a more detailed set of implementation strategies with measurable outcomes and timelines. The planning process also allows for reexamination of policies, given current economic conditions and recent developments within the plan boundary. Most notably is the increased activity around the Highway 150 corridor as a major link between Charlotte and Hickory. Similarly, the area between Denver and Terrell will most likely experience high growth in the next several decades. The Highway 150 Corridor plan is divided into five different topic areas including: economic development, land use and community design, transportation, public services and community facilities, natural/cultural resources and open space. Each area highlights current conditions, plan principles (carried over from the Sherrills Ford Small Area Plan), plan goals, and Plan Actions Strategies, which are the implementation components of the Plan.

Following are some of the key goals highlighted in the Highway 150 Plan based on existing plans and citizens' input: pursue well planned developments offering amenities, services, and jobs designed to attract a wide ranging population at strategic locations within the corridor; modify land area for mixed use, commercial, and multi-family development so it is clustered at strategic intersections to allow for increased access to goods and services, while minimizing associated traffic

congestion; allow for additional flexibility within the Mixed Use Corridor-Overlay, through additional uses, roof design and placement of structures within developments; promote the route for Highway 150 through the Terrell Historic District, and the intersection alignments of Sherrills Ford Road/Slanting Bridge Road, Highway 150/Mt. Pleasant Road, and Highway 150/Greenwood Road; construct a multi-purpose lane and bike path during the widening of the Highway 150 corridor; request that the North Carolina Department Of Transportation (NCDOT) consider designing an elevated Lake Norman bridge in order to provide greater access to larger boats; work with Iredell County and Mooresville to coordinate Highway 150 development regulations; and include the Community Oriented Schools concept, which uses a collaborative process that involves the community, key stakeholders, planning, and school officials as one of the factors in new school facility site selection; preserve open space by encouraging farmers to participate in the Voluntary Agricultural District program and work with developers to include open space within their projects; and encourage and support the Catawba County Historical Association and North Carolina Historical Society to preserve historic properties and help identify adaptive reuse opportunities to ensure sustainability.

The Highway 150 Corridor Plan includes a future land use map that reflects the recent development within the plan boundary and identifies areas that may be appropriate for future development. The map is broken down into several categories: Residential-High Density (R-20), Residential-Medium Density (R-30), Office-Institutional, Mixed use/Commercial/Multi-family, and Industrial/Infrastructure. Residential-Medium density areas (R-30) are located near the lake to help protect the environmental quality of the area and allows for 1.33 dwelling units per acre and limited non-residential development (churches, schools). Residential-High Density (R-20) applies to areas with proximity to commercial districts and amenities, but farther from the lake. The mixed-use areas are limited to properties adjacent to or within a short distance from the intersections of Highway 150/16, Highway 150/Mt. Pleasant Road, Highway 150/Slanting Bridge Road, Highway 150/Sherrills Ford Road, and where existing commercial uses exist near the lake on the eastern end of the corridor. Mixed-use development can include higher density residential, commercial, and office-institutional uses. The industrial areas are limited to areas currently zoned Industrial.

The Plan was drafted by the Catawba County Planning staff with information from several agencies in Catawba County and regional information from Lincoln County, City of Mooresville, and Iredell County which touch the study areas. A public informational forum was held on November 21, 2013, to gather public comments on the plan. Approximately 250 people attended the meeting. There were several written comments received from the attendees. Generally speaking, most wanted commercial activities along the corridor, but wanted them somewhat consolidated with joint access to avoid commercial sprawl and congestion. Most wanted bike lanes; many felt infrastructure should be installed before more development occurred. Plan strategies were considered by the Catawba County Planning Board at its February 24, 2014 meeting.

A follow-up forum was held on May 8, 2014, to give the public an opportunity to view the draft plan and offer comments. The majority of comments were consistent with those expressed at the November 21 forum. Additional comments included consideration for connection of Highway 150 with Burris Road to help with emergency traffic. Raising the proposed Highway 150 bridge over the lake to allow for larger boat access was expressed as well. Approximately 80 people attended the meeting.

The Planning Board held a public hearing on May 27, 2014, to consider the plan. No one from the public was present to speak for or against the plan. Board discussion after the public hearing included the following observations/requests: it would be advantageous to reserve additional right-of-way during the Highway 150 design phase to include space for a multi-modal path, even if trails cannot be built at this time; revise the Public Facilities & Utilities Map to show which of the sewer lines are gravity fed (if applicable) versus pressurized lines; request that NCDOT look at possible realignment or warrant study for a signal light at the Grassy Creek Road/Highway 150 and Mt. Pleasant intersection; and request that NCDOT consider the costs and benefits of raising the main Highway 150 bridge at Lake Norman. (Note: Each of these observations/requests are covered in the proposed Plan.)

By a vote of 9-0, the Planning Board recommended the Highway 150 Corridor Plan and accompanying maps to the Board of Commissioners for its consideration for approval. Since the Planning Board public hearing, staff prepared a comparison chart reflecting current requirements and proposed changes to Mixed Use Corridor-Overlay (MUC-O) standards for the Board of Commissioners. Staff also revised the map entitled Highway 150 Corridor Study Future Zoning Overlay by removing the expanded MUC-O for the proposed Village Center and leaving the existing 500-foot MUC-O on both sides of Highway 150 through the Village Center properties. Any future development of the Village Center must meet MUC-O standards within the existing 500-foot area (either side of right-of-way) as required in the development conditions specified

in the 2007 rezoning of the properties. Also, the expanded MUC-O for the Village Center is not recommended because NCDOT has yet to determine if a re-route to Highway 150 is necessary. In addition to MUC-O standards applying to a portion of the Village Center, a Planned Development-Conditional Zoning was approved on April 7, 2007, for the entire 192 acres with a set of standards, conditions, amenities, public spaces, open space, and passive recreational facilities.

Staff recommends the Highway 150 Corridor Plan as recommended by the Planning Board, with modifications to the map entitled Highway 150 Corridor Study Future Overlay by removing the expanded MUC-O for the proposed Village Center and leaving the existing 500-foot MUC-O on both sides of Highway 150 through the Village Center properties.

CONSENT AGENDA

A. The Board will consider approval of a First Amendment to the County's Economic Development Agreement with Apple. The initial agreement with Apple, dated July 6, 2009, was very specific in outlining projects directly related to the development of a data center in Maiden. Since that time, Apple has developed other properties in Catawba County, particularly for the installation of green energy assets.

The amendment: (1) clarifies specific parcels and improvements subject to the initial agreement; (2) provides a grant for only solar improvements at the Claremont facility, but only if the State stopped providing its grant on solar equipment (no property at the Conover location is subject to the original agreement or this amendment); (3) states the County is desirous and supportive of Apple's development and utilization of green energy sources in order to offset new energy demands created by specific, identified, and announced building and personal property investments and new job creation in Catawba County; and (4) clarifies that investments on those parcels will qualify for Economic Development grants as categorized in the proposed Amendment.

The proposed amendment clarifies that the addition of solar energy equipment will not be recognized for economic development grants by the County unless the current State exemption for grants is repealed, and would only then grant an amount equal to the current State exemption for qualifying solar equipment under North Carolina General Statutes 105-275(45), holding the County harmless. The County would receive the same amount of net taxes on the solar properties even if the current State exemption was to be repealed. The Board's Finance and Personnel Subcommittee recommends approval of this amendment.

B. The Board will consider a request to appropriate existing fund balance in the amount of \$30,000 for the Bandys Crossroads Volunteer Fire Department, which would use these funds to replace a skid unit (pump and tank) on a currently owned brush truck. The Fire Department has a 1989 brush truck that has a rusted tank and the rust has damaged the pump. The new skid unit contains both a new tank and new pump and is estimated to cost approximately \$35,000. The cost to replace the entire truck is approximately \$100,000. The Department feels the truck is mechanically sound enough to continue operational usage once the skid unit is replaced.

Historically, each department has its own fund balance carried from year to year unless the department makes a request to appropriate it. The fund balance is created through tax revenue collections exceeding the projections established by the Budget Department prior to the fiscal year. The Fire Department can utilize 90% of the existing fund balance to address major projects such as buildings, building additions, truck replacement and other non-recurring needs such as equipment items. Ten percent of each department's fund balance is held for unforeseen expenditures during the budget year. Bandys Crossroads Volunteer Fire Department has an available fund balance of \$46,225. The Board's Finance and Personnel Subcommittee recommends the appropriation of these funds.

C. The Board will consider a budget revision to allocate fund balance in the amount of \$54,633 to Cooperative Extension and Public Health to support 4-H, agriculture/local foods, and food safety programming. Over the last several years, Cooperative Extension accumulated \$54,633 in its liability accounts through program revenue over-collection. These revenues were used to fund departmental initiatives such as ServSafe, Voluntary Agricultural District, Camisole Project, and 4-H programming. The decision was made to modify the way the accounting for these funds occurs by closing out the liability accounts with the end of Fiscal Year 2013/14. Closing the accounts resulted in the revenues falling to General Fund Fund Balance. In order for this \$54,633 in funds to be spent in the current year, it needs to be allocated to the operating budget. Cooperative Extension will need \$42,633 to support its programs during Fiscal Year 2014/15, and Public Health's Environmental Health Division will need \$12,000 to support its delivery of the ServSafe training. These funds will be used to train current staff and administer the program formerly run through Cooperative Extension. The Board's

Finance and Personnel Subcommittee recommends approval of this budget revision.

DEPARTMENTAL REPORTS

SOCIAL SERVICES

The Board will consider approval of a Work First Plan for submission to the North Carolina Department of Human Resources. This Plan must be submitted to the State prior to September 30, 2014. In 1996, Congress ended the national welfare program known as AFDC (Aid to Families with Dependent Children) and crafted legislation to allow states to implement their own welfare programs. This federal devolution of authority enabled the North Carolina General Assembly to go even further with welfare reform. The legislature took the next step, allowing counties to compete for Electing County status – in essence offering a limited number of counties the opportunity to have greater control over local welfare policies as well as greater control over available funding.

On July 21, 2014, the Board voted to pursue “Electing County” status and appointed a committee to assist in the development of the county’s Work First Plan. The draft plan was available for public review and comments from August 11-15, 2014. Copies of the plan were placed at the Department of Social Services and on the Social Services Web Page.

The philosophy of the Work First Plan incorporates quality values and organizational standards that reflect respect for the worth and dignity of each and every citizen. Catawba County’s plan takes personal responsibility to the next level, as well as modeling the plan after the “real world of work”. The plan is to have long-term successful family and child well-being outcomes for the entire Work First population.

Highlights of the plan include: (1) **Benefit Diversion Requirements:** Catawba County will follow established policies implemented by the State regarding benefit diversion with the following exceptions: applicant must cooperate with Child Support, apply for or be receiving Food Assistance, and must register with the Employment Security Commission if not already employed or job being held for the applicant and, if monetarily eligible for Unemployment Benefits (UIB), must apply for the UIB prior to approval of the Benefit Diversion application. (2) **Cooperation with Child Support is an eligibility requirement:** Applicant must cooperate with child support within 12 calendar days of applying for Work First Family Assistance (WFFA). If the applicant fails or refuses to do so without good cause, deny the application for WFFA and notify the Medicaid worker (applicants must apply for Medicaid before applying for WFFA). (3) **Evaluate for or be receiving Food Assistance:** Applicant must be receiving Food Assistance or be evaluated for Food Assistance within 12 calendar days of applying for WFFA. If the applicant fails or refuses to do so without good cause, deny the application for WFFA and notify the Medicaid worker (applicants must apply for Medicaid before applying for WFFA). (4) **Vocational Rehabilitation:** All Work First applicants and recipients referred to Vocational Rehabilitation must complete an application and comply with all recommendations. Failure or refusal to comply without good cause will result in the case being denied or terminated. Future eligibility is contingent upon completing the application and cooperating with Vocational Rehabilitation. (5) **Substance Abuse/Mental Health Initiative for all cases:** Caretakers in child only cases will be required to comply with the policy outlined in Section 104B of the Work First manual – Substance Abuse/Mental Health Initiative as a condition of eligibility. This is an effort to ensure child wellbeing. (6) **Job Quit:** Job quit will be applied to individuals that have been informed of the Job Quit Policy at any time in their history of receiving Work First and who voluntarily quit a job, refuse to accept a bona fide job offer, request a reduction in hours, all without good cause or are terminated with cause.

“Electing County” status continues to be preferred for Catawba County, because it allows greater flexibility in program administration and the possibility to be financially advantageous, although it would certainly be less advantageous than in past years. On August 19, 2014, the Catawba County Social Services Board approved the Work First Electing Plan. The Board’s Policy and Public Works Subcommittee recommends the submission of this Plan.

TAX

1. In accordance with North Carolina General Statutes, the Board will be asked to approve the Fiscal Report and Settlement of taxes for the fiscal year beginning July 1, 2013, and ending June 30, 2014. The report is expected to reflect that \$82,236,986 (97.34%) in real estate and personal property tax has been collected as of June 30, 2014, with \$2,247,183 outstanding in real estate and personal property tax.

2. The Board is expected to receive the proposed Schedule of Values, Standards, and Rules for Catawba County’s 2015 Revaluation and consider a recommended timeline for ultimate adoption of the proposed Schedule of Values, Standards,

and Rules that meets statutory requirements.

Pursuant to a resolution adopted by the Board on October 3, 2011, Catawba County's next countywide revaluation will become effective January 1, 2015. Catawba County has approximately 87,000 separate parcels of land which are required by State law to be appraised at 100% of market value as of the effective revaluation date. To that end, Catawba County staff has worked for many months analyzing data derived from real estate sales, building cost data, and income and expense statements from income producing properties in the County. This has culminated in the formulation of a proposed Schedule of Values, Standards, and Rules to be utilized to generate market value appraisals for all real property in Catawba County.

The Schedule of Values is a set of standards and rules that are used as an appraisal manual by the County appraisal staff to assure properties are valued in an accurate and consistent manner. The schedule contains information on methods used to determine land and building values based on criteria such as: location, age, type of construction, zoning, income potential, cost, etc.

Also included in the proposed Schedule of Values is a special schedule for appraising eligible agricultural, horticultural, and forest land at its "present use" value. This is a statewide schedule formulated by the North Carolina Department of Revenue. Properties whose owners qualify for "present use" assessment will receive two values: a market value mandated by law and a "present use" value.

Adoption of the proposed Schedule of Values is an important step in the revaluation process. Because of its importance, the Machinery Act of North Carolina requires the Board of Commissioners to only adopt it after holding a public hearing and then publicizing that it has done so. After the adoption, property owners will have 30 days to challenge the Schedule of Values by appeal to the North Carolina State Property Tax Commission. In accordance with North Carolina General Statute 105-317(c), the proposed Schedule of Values must be formally presented to the Board of Commissioners not less than 21 days before the meeting at which it will be considered. After the formal presentation, the Board of Commissioners must notify the public through newspapers of general circulation that it has received the proposed Schedule of Values and that it is open for inspection at the Assessor's office. The notice must also inform the public that a public hearing will be held, giving the specific date, time, and place. This public hearing must be at least seven days before the Board of Commissioners' adoption of the proposed Schedule of Values. Staff has recommended the public hearing be scheduled for October 6, 2014, at 9:30 a.m., in the Robert E. Hibbitts Meeting Room of the 1924 Courthouse.

Staff recommended the vote for formal adoption occur at the October 20, 2014, meeting in the Robert E. Hibbitts Meeting Room of the 1924 Courthouse. Afterwards, a newspaper notice must be published stating that the Schedule of Values has been adopted and that property owners have 30 days from the date of the first publication to challenge the Schedule of Values by appeal to the North Carolina State Property Tax Commission on grounds that the Schedule of Values does not adhere to the appropriate statutory valuation standard (that it will produce values that are too high, too low or inconsistent). The North Carolina State Property Tax Commission has the power to order the Board of Commissioners to revise the Schedule of Values if they do not adhere to the statutory valuation standard. The North Carolina State Property Tax Commission's decision may be appealed to the North Carolina Court of Appeals. Assuming an October 20, 2014, adoption of the Schedule of Value, property owners would have until Wednesday, November 19, 2014, to challenge the Schedule of Values.

CONTACT: DAVE HARDIN, PUBLIC INFORMATION OFFICER 465-8464

Government of Catawba County, North Carolina

"Keeping the Spirit Alive Since 1842!"

PROCLAMATION

Fire Prevention Week

October 5-11, 2014

WHEREAS, Catawba County is committed to ensuring the safety and security of all those living in and visiting Catawba County; and

WHEREAS, fire is a serious public safety concern, both locally and nationally, and homes are the locations where people are at greatest risk from fire; and

WHEREAS, home fires killed more than 2,300 people in the United States in 2012, according to the latest research from the nonprofit National Fire Protection Association (NFPA), and fire departments in the United States responded to more than 365,000 home fires; and

WHEREAS, working smoke alarms cut the risk of dying in reported home fires in half; and

WHEREAS, three out of five home fire deaths result from fires in properties without working smoke alarms and in one-fifth of all homes with smoke alarms, none were working; and

WHEREAS, residents should install smoke alarms in every sleeping room, outside each separate sleeping area, and on every level of the home; and

WHEREAS, residents should install smoke alarms and alert devices that meet the needs of people who are deaf or hard of hearing; and

WHEREAS, residents who have planned and practiced a home fire escape plan are more prepared and will therefore be more likely to survive a fire; and

WHEREAS, Catawba County first responders are dedicated to reducing the occurrence of home fires and home fire injuries through prevention and protection education; and

WHEREAS, Catawba County residents are responsive to public education measures and are able to take personal steps to increase their safety from fire, especially in their homes; and

WHEREAS, the 2014 Fire Prevention Week theme, "Working Smoke Alarms Save Lives: Test Yours Every Month!" effectively serves to remind us that we need working smoke alarms to give us the time to get out safely.

THEREFORE, THE CATAWBA COUNTY BOARD OF COMMISSIONERS, does hereby proclaim October 5-11, 2014, as Fire Prevention Week in Catawba County, and urges all the citizens of Catawba County to test their smoke alarms at least every month and to support the many public safety activities during Fire Prevention Week 2014.

This the 8th day of September, 2014.

Katherine W. Barnes, Chair
Catawba County Board of Commissioners

MEMORANDUM

TO: Catawba County Board of Commissioners

FROM: Jacky Eubanks, Planning and Parks Director

DATE: September 8, 2014

IN RE: Highway 150 Corridor Plan

REQUEST

Conduct a public hearing on the Highway 150 Corridor Plan and consider approving the Plan and accompanying maps.

BACKGROUND

Over the past 15 years, Catawba County has adopted/accepted long-range planning initiatives for the purpose of providing the framework for coordinated growth and development. These plans included a county-wide comprehensive plan, referred to as VisionQuest 2010 (1996), Future Forward (2003), and smaller focused plans referred to as "Small Area Plans" (SAP). The plan most associated with the Highway 150 corridor is the Sherrills Ford SAP (February 2003).

The purpose of the Highway 150 Corridor Plan is to build upon the foundation of the existing plans and to develop a more detailed set of implementation strategies with measurable outcomes and timelines. The planning process also allows for reexamination of policies, given current economic conditions and recent developments within the plan boundary. Most notably is the increased activity around the Highway 150 corridor as a major link between Charlotte and Hickory. Similarly, the area between Denver and Terrell will most likely experience high growth in the next several decades.

The Highway 150 Corridor plan is divided into five different topic areas including: economic development, land use and community design, transportation, public services and community facilities, natural/cultural resources and open space. Each area highlights current conditions, plan principles (carried over from the Sherrills Ford Small Area Plan), plan goals, and Plan Actions Strategies (PASs), which are the implementation components of the Plan.

Following are some of the key goals highlighted in the Highway 150 Plan based upon existing plans and citizens' input:

- 1) Pursue well planned developments offering amenities, services, and jobs designed to attract a wide ranging population at strategic locations within the corridor.
- 2) Modify land area for mixed use, commercial, and multi-family development so they are clustered at strategic intersections to allow for increased access to goods and services, while minimizing associated traffic congestion.
- 3) Allow for additional flexibility within the Mixed use Corridor-Overlay, through additional uses, roof design and placement of structures within developments.
- 4) Evaluate the route for Highway 150 through the Terrell Historic District, and the intersection

alignments of Sherrills Ford Road/Slanting Bridge Road, Highway 150/Mt. Pleasant Road, and Highway 150/Greenwood Road.

- 5) Construct a multi-purpose lane and bike path during the widening of the Highway 150 corridor.
- 6) Request NCDOT to consider designing an elevated Lake Norman bridge in order to provide greater access to larger boats.
- 7) Work with Iredell County and Mooresville to coordinate Highway 150 development regulations.
- 8) Include the Community Oriented Schools approach as one of the factors in consideration for new school facility site selections. Utilize a collaborative process involving the community, key stakeholders, planning, and school officials.
- 9) Preserve open space by encouraging farmers to participate in the Voluntary Agricultural District program, and work with developers to include open space within their projects.
- 10) Encourage and support the Catawba County Historical Association and NC Historical Society to preserve historic properties and help identify adaptive reuse opportunities to ensure sustainability.

The Highway 150 Corridor Plan includes a future land use map that reflects the recent development within the plan boundary and also identifies areas that may be appropriate for future development. The future land use map is broken down into several categories: Residential-High Density (R-20), Residential-Medium Density (R-30), Office-Institutional, Mixed use/Commercial/Multi-family, and Industrial/Infrastructure. Residential-Medium density areas (R-30) are located near the lake to help protect the environmental quality of the area and allows for 1.33 dwelling units per acre and limited non-residential development (churches, schools). Residential-High Density (R-20) applies to areas with proximity to commercial districts and amenities, but farther from the lake. The mixed-use areas are limited to properties adjacent to or within a short distance from the intersections of Highway 150/16, Highway 150/Mt. Pleasant Road, Highway 150/Slanting Bridge Road, Highway 150/Sherrills Ford Road, and where existing commercial uses exist near the lake on the eastern end of the corridor. Mixed-use development can include higher density residential, commercial, and office-institutional uses. The industrial areas are limited to areas currently zoned Industrial.

The Plan was drafted by the Catawba County Planning staff with regional information obtained from Lincoln County, City of Mooresville, and Iredell County which touch the study areas. Technical assistance was provided by: Catawba County Utilities and Engineering, Catawba County GIS, Western Piedmont Council of Governments, Economic Development Commission, NCDOT, and the Catawba County Historical Association.

A public informational forum was held on November 21, 2013 to gather public comments on the plan. Approximately 250 people attended the meeting. There were several written comments received from the attendees. Generally speaking, most wanted commercial activities along the corridor, but wanted them somewhat consolidated with joint access to avoid commercial sprawl and congestion. Most wanted bike lanes; many felt infrastructure should be installed before more development occurred. Plan strategies were considered by the Planning Board in a workshop at its February 24, 2014 meeting.

A follow-up forum was held on May 8, 2014 to give the public an opportunity to view the draft plan and offer comments. The majority of comments were consistent with those expressed at the November 21

forum. Additional comments included consideration for connection of Highway 150 with Burris Road to help with emergency traffic. Raising the proposed Highway 150 bridge over the lake to allow for larger boat access was expressed as well. Approximately 80 people attended the meeting.

STAFF RECOMMENDATION

Staff recommends the Highway 150 Corridor Plan and accompanying maps as presented to the Planning Board.

Public Hearing and Board Discussion

The Planning Board held a public hearing on May 27, 2014 to consider the plan. No one from the public was present to speak for or against the plan. Board discussion after the public hearing included the following observations/requests:

- 1) It would be advantageous to reserve additional ROW during the Highway 150 design phase to include space for a multi-modal path, even if trails cannot be built at this time.
- 2) Revise Map 9 – Public Facilities & Utilities, to show which of the sewer lines are gravity fed (if applicable) versus pressurized lines. This would be beneficial to potential developers.
- 3) Request NCDOT look at possible realignment or warrant study for a signal light at Grassy Creek Road Highway 150 and Mt. Pleasant intersection.
- 4) Request NCDOT to consider the costs and benefits of raising the main Highway 150 bridge at Lake Norman.

(Note: Each of these observations/requests are covered in the proposed Plan.)

PLANNING BOARD RECOMMENDATION

By a vote of 9-0, the Planning Board recommended the Highway 150 Corridor Plan and accompanying maps to the Catawba County Board of Commissioners for their consideration for approval.

Post Planning Board Public Hearing Discussions

Since the Planning Board Public Hearing, staff prepared a comparison chart reflecting current requirements and proposed changes to Mixed Use Corridor-Overlay (MUC-O) standards for the Board of Commissioners. Staff also revised Map 7 entitled Hwy 150 Corridor Study Future Zoning Overlay removing the expanded MUC-O for the proposed Village Center and leaving the existing 500-foot MUC-O on both sides of Highway 150 through the Village Center properties.

POST PLANNING BOARD RECOMMENDATION

A motion to consider:

1. The Highway 150 Corridor Plan as recommended by the Planning Board;
2. Modifications to Map 7 reflecting the removal of the expanded MUC-O for the proposed Village Center; and
3. Leaving the existing 500-foot MUC-O on both sides of Highway 150 through the Village Center properties.

Highway 150 Corridor Plan



“Where Yesterday Meets Tomorrow”

Catawba County

Adopted (Date)

Table of Contents

Chapter 1: Introduction

Map 1: Plan Area Boundary

Chapter 2: Economic Development

Map 2: Approved Development Projects

Chapter 3: Land Use and Community Design

Map 3: Current Land Use

Map 4: Current Zoning

Map 5: Current Zoning Overlay

Map 6: Future Land Use & Economic Opportunity

Map 7: Future Zoning Overlay

Chapter 4: Transportation

Map 8: Transportation / Multi-modal Recommendations

Chapter 5: Public Services and Community Facilities

Map 9: Public Facilities & Utilities

Chapter 6: Natural/Cultural Resources and Open Space

Map 10: Natural and Cultural Resources

Map 11: Terrell Historic District

Highway 150 Corridor Plan

Highway 150 Corridor Plan

Introduction	1
Purpose	1
Plan Area	2
Background	2
Process	5

INTRODUCTION

Over the past 15 years, Catawba County has undertaken a series of long-range planning initiatives to assist coordinated growth and development of the County. These plans included a county-wide comprehensive plan, referred to as VisionQuest 2010 (1996), a Strategic Growth Plan (1999) and smaller focused plans referred to as “Small Area Plans” (SAP).

Within the last several years, there has been noticeable activity in and around the Hwy. 150 corridor as it is a vital connector between Hwy. 16 and I-77. The Corridor links the Charlotte and Hickory metro areas. The past two decades have also seen considerable growth in the area north of Charlotte along I-77. This growth trend will most likely take place between the Terrell and Denver areas within the next decade and beyond.



US Highway 150

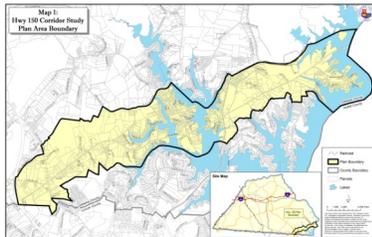
PURPOSE

The purpose of the Hwy. 150 Corridor Plan, hereafter referred to as the “Plan”, is to: (1) develop a set of goals based upon applicable principles in the Sherrills Ford SAP , and (2) prepare a series of Plan Action Strategies (PASs) with measurable outcomes, and realistic timelines. See Table 1: Plan Action Strategy (PASs) Legend prior to this chapter and each Plan Action Strategy (PASs) table at the end of their respective chapters. The legend explains the symbols, prioritization, and timelines associated with each PASs. The appendix also has a consolidated PAS table for convenience. The plans described in the Background sec-

tion are still valid and serve as the foundation for this Plan.

More specifically, the Plan addresses a series of issues focusing upon:

- A smaller geographic area than what was previously defined within the Future Forward Plan, and the Sherrills Ford SAP;
- The identification of potential economic and educational opportunities;
- An improved transportation network;
- A more harmonious development approach for the County and other jurisdictions along Hwy. 150; and
- Modifying land use recommendations and design standards.



Study Area

PLAN AREA

The boundary of the corridor extends approximately one-half to one-mile north of Highway 150, following the Seaboard Coast Railroad right-of-way, running along Mt. Pleasant Road, along property lines to Highway 16 Business, and then to the new Highway 16. To the south, the corridor extends approximately one-half mile and follows the edges of Lake Norman and property lines. The corridor runs from the Catawba River to the Lincoln County line. See *Map 1: Hwy. 150 Corridor Study Plan Area Boundary*.

BACKGROUND

As noted in the *Introduction* above, several plans have been adopted/accepted which include components relative to the Hwy. 150 corridor. Following is an overview of those plans and key components, several of which are incorporated into this Plan.

FUTURE FORWARD (2003) – In the Summer of 2002, a committee of business, government, and academic leaders was formed to include twelve counties in North Carolina’s 10th and 11th Congressional District. The Fu-

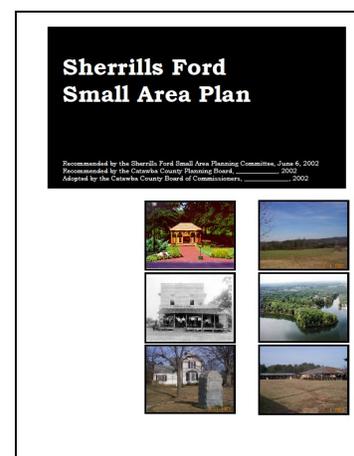
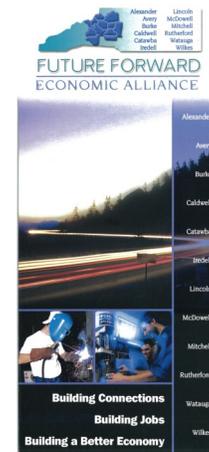
Chapter 1 Introduction

ture Forward Committee set out to create a regional economic development strategy which would serve as a guide to the future and identify critical public and private investments in response to significant economic challenges in the area. This plan identified key elements of the “Future Forward Vision” by focusing upon:

- Improving education and skills of the workforce
- Encouraging a renewed sense of entrepreneurship and innovation
- Promoting a more diverse economy
- Developing and protect the outdoor amenities/environment
- Encouraging teamwork of local governments

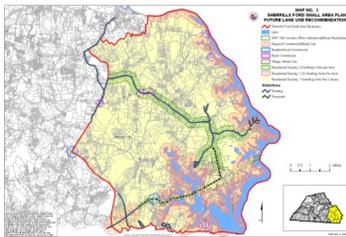
SHERRILLS FORD SMALL AREA PLAN (2003) - This plan is one of seven plans prepared for the unincorporated areas of the County resulting from one of the sixteen strategies identified the County’s Long Range Strategic Growth Plan. The plan addresses a host of recommendations some of which are listed below:

- Land Use and Community Design
 - A village center should be designated at the intersection of Hwy. 150 and Sherrills Ford Road, with other commercial nodes along the corridor;
 - Where utilities are available, commercial uses and high density single family and multi-family developments are recommended in the area of the village center at Terrell;
 - Developments along the lake should be of a lower density to protect the lake environment;
 - Development standards should be applied to address access management, setbacks, landscaping, interconnectivity, signage, mixed density and small neighborhood uses; and
 - Industrial uses should be limited to those areas currently zoned for industry.



Chapter 1 Introduction

- Transportation
 - Perform a feasibility study for widening and/or relocating Hwy. 150, including alternatives through Historic Terrell. The SAP Committee favored a four-lane divided highway with landscaped median;
 - Implement measures to preserve enough right-of-way for highway widening;
 - Pursue funding for pedestrian and bicycle paths;
 - Explore mass transit connections;
 - Pursue funding for “gateway” improvements; and
 - Review Hwy. 150 and Slanting Bridge Road intersections for safety improvements.
- Community Facilities and Public Services
 - Provide recreational opportunities, and offer water access areas on Lake Norman.
 - Obtain a larger library to allow for increased offerings to patrons. Include a public meeting/community room.
 - Explore the possibilities of public water and sewer on a regional basis.
- Economic Development
 - Direct large-scale mixed use commercial developments to the Hwy. 150 corridor, the Hwy. 150/16 regional commercial center and the village center at Terrell.
 - Designate neighborhood commercial centers at the intersections of Hwy. 150. and Mt. Pleasant Road and Hwy. 16.
 - Heavy industrial uses should be limited to currently zoned industrial sites. Light industrial uses should be developed in an attractive park-like setting.



*Future Land Use
Sherrills Ford SAP*

Chapter 1 Introduction

- Natural and Cultural Resources
 - Establish voluntary agricultural districts as a means of protecting the rights of farmers to continue to farm.
 - Encourage the County to partner with local organizations/corporations to increase recreation opportunities.
 - Consider strategic land purchases or development right purchases to preserve wildlife habitats and provide community recreation opportunities.

PROCESS

Staff met with the jurisdictions of Lincoln County, City of Mooresville, and Iredell County which touch the study area.

A drop-in session was held at the Sherrills Ford-Terrell Fire and Rescue facility on November 21, 2013 to gain public input for the County's Highway 150 Corridor Plan. Approximately 256 people signed in for the event. Large scale maps were displayed showing the Corridor Area Study Boundary, Current Land Use, Current Zoning, Current Zoning Overlays, Public Facilities/Utilities, Natural/Cultural Resources, Volunteer Agricultural Districts, and a location map of development projects approved along the corridor. An NCDOT representative displayed maps showing alternative routes for the Terrell area of Hwy.150. A summary of attendees comments on the plan can be seen in the appendix.

The Plan was drafted by the Catawba County Planning staff with technical assistance from the following:

- Catawba County Utilities and Engineering
- Catawba County GIS
- Western Piedmont Council of Governments
- Economic Development Commission
- NCDOT
- Catawba County Historical Association



Terrell



Public Forum

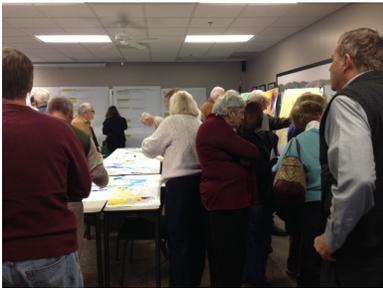
Chapter 1 Introduction

The draft plan strategies were considered by the Planning Board in a workshop at its February 24, 2014 meeting.

The draft plan strategies and maps were presented to the public in a drop-by session at the Sherrills Ford-Terrell Fire and Rescue facility on May 8, 2014. Approximately 80 people attended.

The Planning Board conducted a public hearing on the plan at its May 27, 2014 meeting.

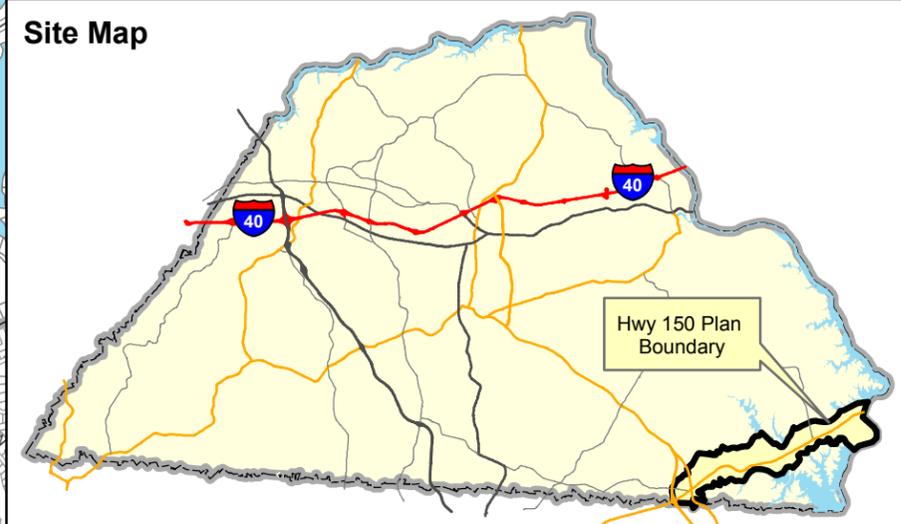
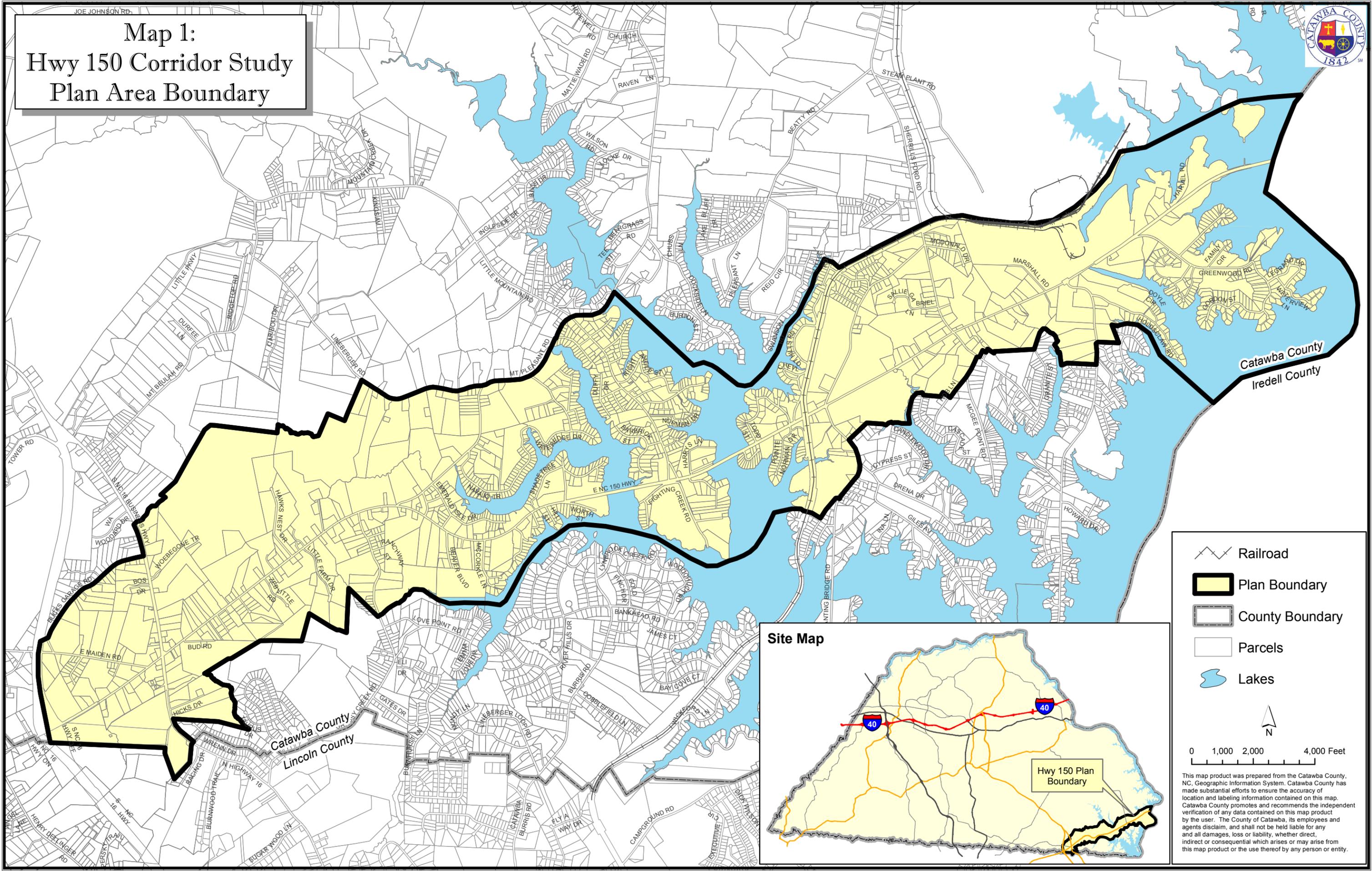
The Board of Commissioners conducted a public hearing on the plan at its _____ meeting.



Public Forum



**Map 1:
Hwy 150 Corridor Study
Plan Area Boundary**



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Economic Development

CURRENT CONDITIONS AND TRENDS

Catawba County’s economy continues to move away from its historic reliance upon traditional manufacturing industries such as textile, hosiery and furniture. As Catawba County’s economy has become more diverse over the last decade, a shift from the production of goods to the provision of services in sectors such as: health care, finance, retail, food, and administration has occurred.

The Hickory MSA continues to suffer under a high unemployment rate. The current rate as of May 2014 is 7.1% as compared to 10.1% in July 2013. The overall labor force decreased from 153,301 in July 2013 to 151,345 in January 2014. These trends are at a level that contributes to an anemic local economy.

Economic Development

Current Conditions and Trends	1
Guiding Principles	2
Plan Goals	2

It is imperative to aggressively pursue economic opportunities that will help turn these negative economic indicators around. One opportunity centers around the growth along Lake Norman on the I-77 Corridor from Charlotte to Mooresville and extends on NC 150 across the lake into Catawba County. Factors which make this corridor so attractive are its accessibility to major transportation arteries, close proximity to a major international airport, a regional airport, and two metropolitan areas.

Are there recent developments within the Plan area which offer reason for hope and optimism? The answer is yes. Three examples within the NC 150 corridor area that have great potential to foster economic development are:

Sherrills Ford

Village Center — The 200 acre site located at the intersection of NC 150 and Slanting Bridge Road was approved in 2007 as a mixed use development including single and multi-family residential, retail, office, and public facility space.

Crosland's Bridgewater — The 44 acre development located at the intersection of NC 150 and NC 16 Bypass was approved in 2008. The master planned development should provide over 200,000 square feet of commercial opportunities.

Lowe's Home Improvement — The 22 acre site located north of the Crosland site on NC 150 was originally approved for a home improvement center and remains a high priority opportunity site for retail or mixed use adjacent to the NC 150/ NC 16 Bypass interchange.

GUIDING PRINCIPLES

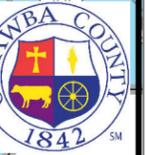
- EP-1 Facilitate and encourage new well-planned economic investments in the Sherrills Ford area.
- EP-2 Provide more opportunities for a variety of job types in an effort to improve the employment base in Sherrills Ford, reduce travel trips outside the County, and redirect consumer spending from the Charlotte region to the NC 150 corridor.

PLAN GOALS

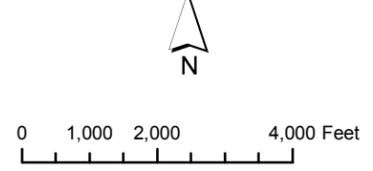
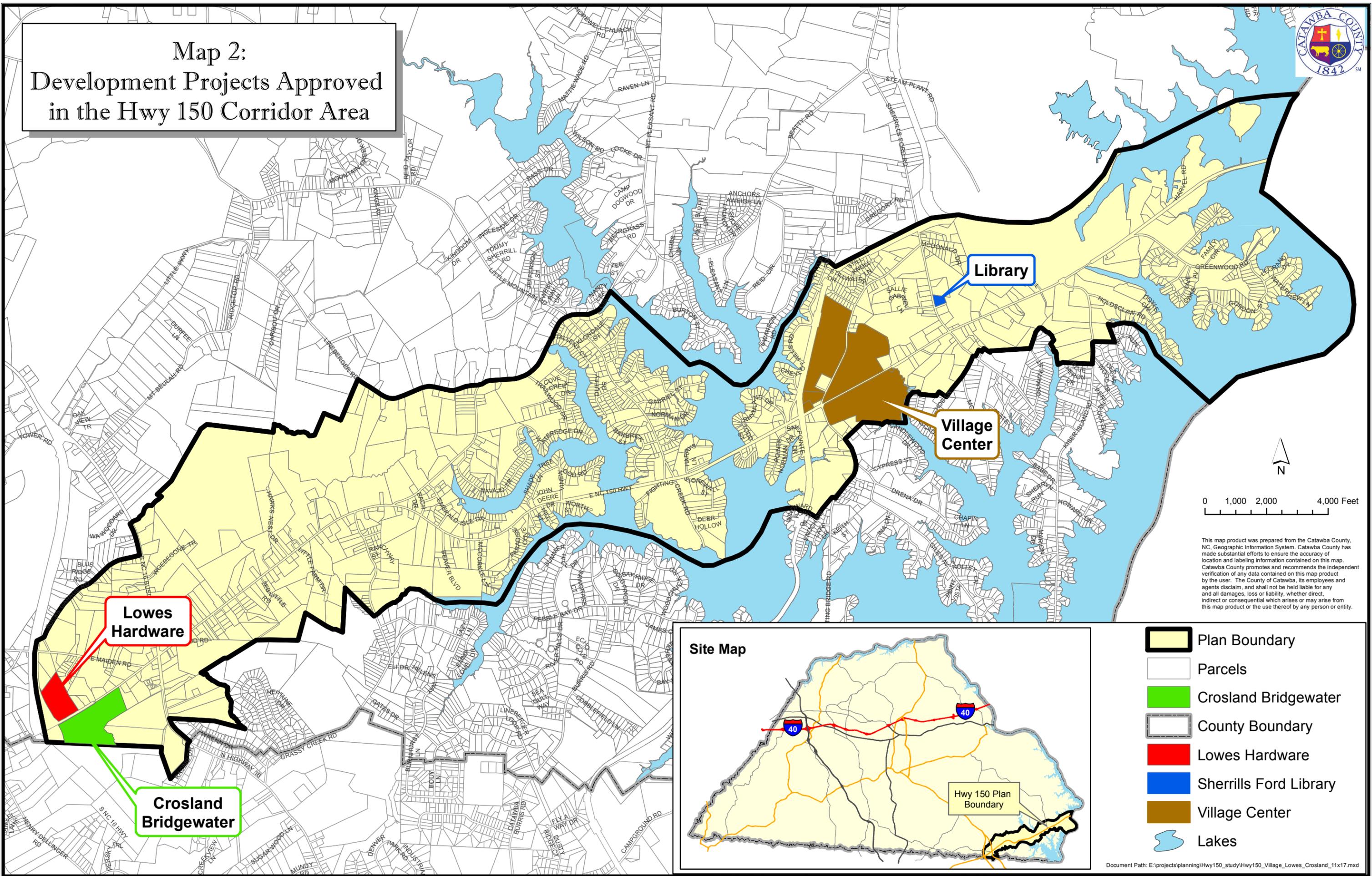
- EG-1 Pursue the development of well-planned development offering amenities, services, and jobs designed to attract a wide ranging population at strategic locations within the corridor. *See Map 2: Development Projects Approved in the Hwy 150 Corridor Area.*

**Plan Action Strategies (PASs)
Economic Development**

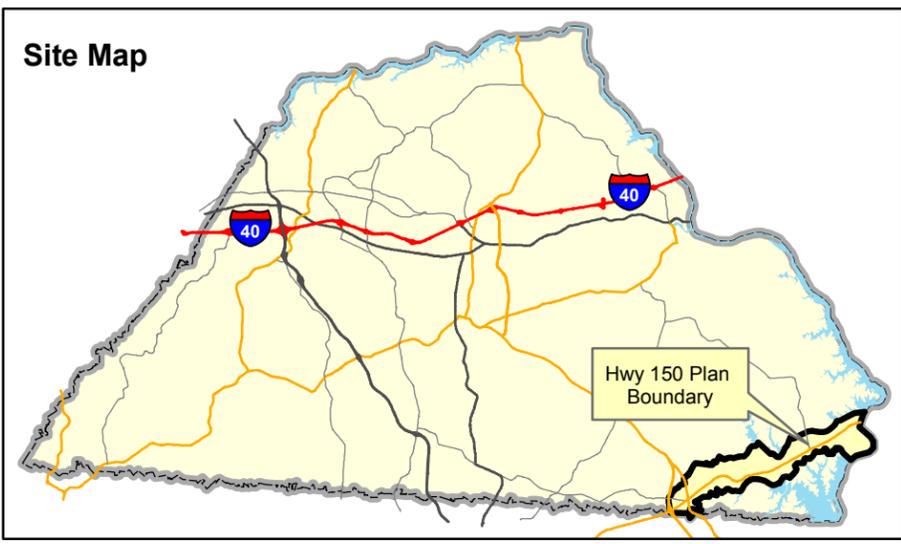
PASs #	CATEGORY	GOAL	LEAD AGENCY	ACTION STEPS	CHAPTER #	PRINCIPAL #	GOAL #	TIMEFRAME	PRIORITY
1	Economic Development	Pursue the development of well-planned development offering amenities, services, and jobs designed to attract a wide ranging population at strategic locations within the corridor.	Planning and Utilities and Engineering	Coordinate efforts between the County and private developers in achieving necessary project approvals and permits.	2	EP-1 EP-2	EG-1	Ongoing	H



Map 2: Development Projects Approved in the Hwy 150 Corridor Area



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-  Plan Boundary
-  Parcels
-  Crosland Bridgewater
-  County Boundary
-  Lowes Hardware
-  Sherrills Ford Library
-  Village Center
-  Lakes

LAND USE AND COMMUNITY DESIGN

CURRENT LAND USE

Residential uses and open space occupy the vast majority of land in the Plan boundaries. The majority of manufacturing/industrial uses in the Plan are located east of Sherrills Ford Road. Commercial and office-institutional uses are dispersed throughout the Plan area. *See Map 3: Current Land Uses.*

Land Use And Community Design

Current Land Use	1
Current Zoning	2
Existing Zoning Overlay Districts	4
Site Development Patterns and Land Design Trends	5
Future Land Use Classifications	5
Guiding Principles	6
Plan Goals	7

Forty-five percent (45%) of the land is used for residential purposes, while 41% remains vacant (open space). Industrial and manufacturing uses occupy 6% of the land area and commercial and office-institutional uses occupy 5% and 3% each respectively. *See Table 2: Acreage by Use.*

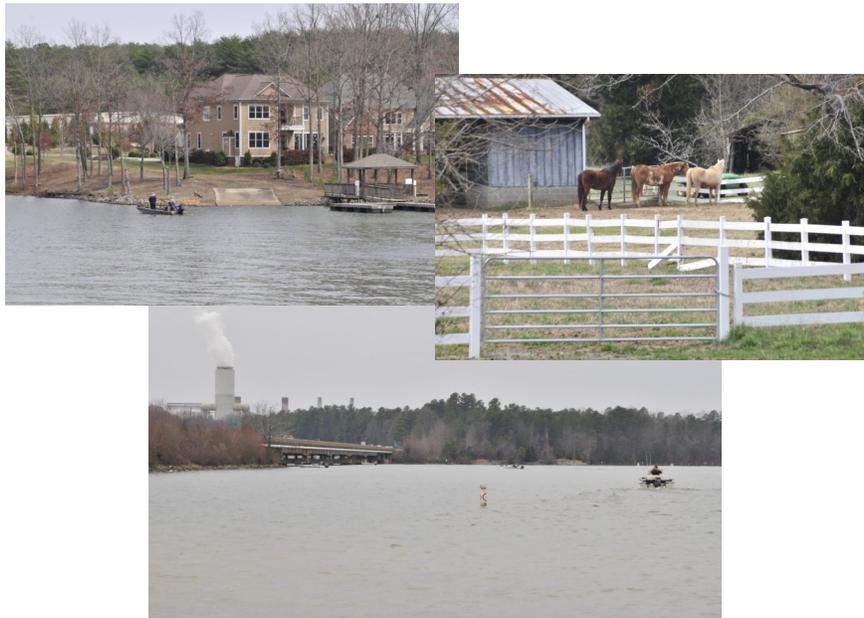


Table 2: Acreage by Use		
LAND USE	Acreage	% of Total
Open Space	2,096	45%
Residential	1,920	41%
Office-Institutional	128	3%
Commercial	234	5%
Industrial/Manufacturing	263	6%
Total Acreage	4,642	100%

Source: Catawba County GIS, 2014

CURRENT ZONING

There are 4,642 acres within the Plan boundary. Residential zoning occupies 3,707 acres and non-residential (office-institutional, commercial, and industrial) zoning encompasses the remaining acres. *See Table 3: Acreage by Zoning District.*

Source: Catawba County GIS, 2014

Table 3: Acreage by Zoning District					
ZONING DISTRICT	Acreage	Occupied Acreage	Vacant Acreage	% Occupied	% Vacant
Residential (R-40, R-30, R-20)	3,707	3,560	147	96%	4%
Office-Institutional (O-I)	6	6	0	100%	0%
Commercial (RC, HC, HC-CD, PD, PD-CD)	609	433	176	71%	29%
Industrial (I)	320	299	21	94%	6%
Total	4,642	4,298	344	93%	7%

Chapter 3 Land Use and Community Design

Residential properties located near the lake are predominately classified as R-30 which is intended to accommodate medium-density (one house 3/4 acre) single-family development and agricultural uses. Residential properties located along Hwy. 150 and at the intersection of Hwy. 150 and Sherrills Ford Road are predominately classified as R-20 which is intended to accommodate higher-density (two houses per acre) single-family development and agricultural uses. The R-40 zoning (one house per acre) applies to most of the larger tracts of land west of Lake Norman near the plan boundary.

Residential growth in the Lake Norman area began increasing in this area and within the corridor soon after construction of Cowans Ford Dam in 1963 and the subsequent creation of Lake Norman. This area of Catawba County is projected to see the largest population growth for the foreseeable future.

Property zoned for General Industrial development (GI) is concentrated at Duke Energy's Marshall Steam Station. There are also several other GI properties in the corridor located on Mt. Pleasant Road (sewer treatment), Hwy. 150 (Steele Rubber Products), and Hwy. 16 Business (rock quarry). The GI district allows for intensive manufacturing, processing, and assembly uses.

Property zoned for mixed-use development (PD-CD) exists at the Hwy. 150 and Hwy. 16 Bypass interchange and at the intersection of Hwy. 150 and Slanting Bridge Road. The PD-CD zoning district is specific to a development proposal. The development proposed to the east (Village Center) allows for a combination of retail, commercial, office-institutional and residential components while the one to the west (Bridgewater) allows for retail, commercial, and office uses.

The majority of existing Rural Commercial RC property is located near the intersection Hwy. 150 and Mt. Pleasant Road. The RC district allows for offices, services, and retail uses designed in scale with residential uses. There is some Highway Commercial HC zoning near this intersection; however, the majority is located in the proximity of the Hwy. 150/Hwy. 16 Business intersection. This district provides for regional highway-oriented businesses, office, service, and civic uses.

Very little property is zoned Office-Institutional (O-I) which provides for office, institutional, civic, or other low intensity commercial uses. *See Map 4: Current Zoning.*

EXISTING ZONING OVERLAY DISTRICTS

The Watershed Protection-Overlay establishes watersheds designed to protect sources of water supply for public water systems by regulating density and built-upon area. The WS-IV Watershed Protected Area exists in the western portion of the corridor. Development is limited in the WS-IV Protected Area as required by the NC Water Supply Watershed legislation. The Protected Area requires 20,000 square feet (approximately two dwellings per acre) for each single-family residential lot or 15,000 square feet (approximately 3 dwellings per acre) with public water or sewer. All other residential and non-residential development in the Protected Area is limited to 24% lot coverage if curb and gutter systems are installed or 36% lot coverage without curb and gutter systems. The WS-IV Critical Area which exists closest to the lakeshore allows less development, requiring 20,000 square feet (approximately 2 dwellings per acre) for each single-family residential lot. All other residential and non-residential development in the Critical Area is limited to 24% lot coverage.

The Catawba River Corridor-Overlay exists to protect the aesthetic qualities of the lake as well as the natural resource. It extends 500 feet inland from the high water elevation of Lake Norman. Minimum lot sizes within the corridor are 30,000 square feet (approximately 1.33 dwellings per acre). Accessory structures must be setback a minimum of 30 feet from the high water mark. Low impact development (LID) techniques must be incorporated in all non-residential and multi-family development.

The Rural Preservation-Overlay is established to protect the viewshed along Hwy. 16 Bypass. It requires a 100-foot setback for all new structures adjacent to the right-of-way.

The Mixed Use Corridor-Overlay exists along Hwy. 150 with exception of a small residential area just west of Slanting Bridge Road. The overlay provides standards relating to building design, signage, access manage-

ment, and landscaping. The overlay aims at providing walkable mixed use developments designed at a pedestrian scale compatible with the historical character of the area. See *Map 5: Current Zoning Overlay Map*.

SITE DEVELOPMENT PATTERNS AND LAND DESIGN TRENDS

Historically, rural and agricultural uses were the most dominant land use in the Plan boundary. In recent decades, housing developments have been built throughout the area. The majority of residential developments have occurred along and within close proximity to the lake. Additional residential developments are anticipated near the lake and more growth is expected in areas where public water and sewer lines are extended.

Non-residential developments (Terrell Village Center, Lowe's, and Bridgewater) were approved in 2007 and 2008 near the intersection of Hwy. 150 and Slanting Bridge Road and Hwy. 150 and Hwy. 16 Bypass. The economic downturn slowed development activity within the corridor. Growth within the corridor is anticipated to exceed trends in other areas of the County due to proximity of nearby urban areas, transportation facility improvements, and installation of public sewer.

FUTURE LAND USE CLASSIFICATIONS

In order to guide development in the Plan area, future land use classifications have been depicted on *Map 6: Future Land Use & Economic Opportunity*. The map is separated by classifications of differing land uses based upon an analysis of existing land uses, economic potential, future utilities, road projects, environmental conditions and input from public participation meetings. Following is a description of the land use classifications:

RESIDENTIAL—MEDIUM DENSITY

The medium density residential classification applies to areas around the lake where there is existing residential development and land areas near the corridor boundary to the west of the lake where agricultural uses and residential development exists. These areas are generally

developed with residential uses, are within the Catawba River Corridor-Overlay, or located farther from public utilities. The medium density residential area would allow single-family residential uses on three quarter-acre lots (30,000 sq. ft.) or larger. Non-residential uses (excluding churches, schools and public facilities) should not be permitted.

RESIDENTIAL— HIGH DENSITY

The high density residential classification applies to the land area near the corridor boundary on Sherrills Ford Road and adjacent to Hwy. 150 in a limited area to the west of the lake. Residential uses exist in these locations and greater access to public utilities exist. High density residential area would allow single-family residential uses on half-acre lots (20,000 sq. ft.) or larger. Non-residential uses (excluding churches, schools and public facilities) should not be permitted.

MIXED-USE/COMMERCIAL/MULTI-FAMILY

The mixed-use/commercial/multi-family classification is shown in areas around the intersections of Hwy. 150/Hwy. 16, Hwy. 150/Mt. Pleasant Road, Hwy. 150/Slanting Bridge Road/Sherrills Ford Road, and where existing commercial uses exist near the lake in the eastern corridor. These areas contain the largest amount of existing non-residential uses and have greater access to existing public utilities. The uses are concentrated near the intersections and separated along Hwy. 150 where residential uses exist in an effort not to promote strip development along the full extent of Hwy. 150. Within this classification, higher density residential, commercial and office-institutional uses are allowed but never exclusively single-family homes. The mixed-use classification supports the economic development goals of this Plan.

INDUSTRIAL

The industrial classification is located where there are existing industrial uses within the corridor. Industrial growth is not anticipated within the corridor.

GUIDING PRINCIPLES

- LP-1 Continue to recognize the significant variation in current and future land use patterns and growth demands in different parts of the plan boundary.

Chapter 3 Land Use and Community Design

- LP-2 Establish a balanced land use pattern which includes a good mixture of housing, shopping, employment and civic uses (such as schools and religious facilities).
- LP-3 Encourage development of well-planned integrated retail centers of varying sizes and functions where adequate traffic carrying capacity is available. Such centers should be limited to the intersection of major highways. Stand-alone strip commercial development between intersections should be discouraged.
- LP-4 Regulations should be as flexible as possible to offer the most opportunities for creative land design.

PLAN GOALS

The following goals make recommendations for future land uses aiding in the rezoning process of individual properties upon request. The Plan goals do not proactively rezone those privately-owned properties.

- LG-1 Expand the land area for mixed use, commercial, and multi-family development at the following intersections. *See Map 6: Future Land Use & Economic Opportunity.*
 - Hwy. 150 and Hwy. 16
 - Hwy. 150 and Mt. Pleasant Road
 - Hwy. 150, Slanting Bridge Road, and Sherrills Ford Road
 - Properties just west of the main stem of Lake Norman
- LG-2 Modify the Mixed Use Corridor-Overlay (MUC-O) to include the areas identified for future mixed use, commercial, and multi-family development. *See Map 7: Future Zoning Overlay.*
- LG-3 Allow additional permitted uses within the MUC-O district.
- LG-4 Allow increased flexibility in roof design within the MUC-O district.
- LG-5 Provide greater flexibility in placement of struc-

tures within developments in the MUC-O.

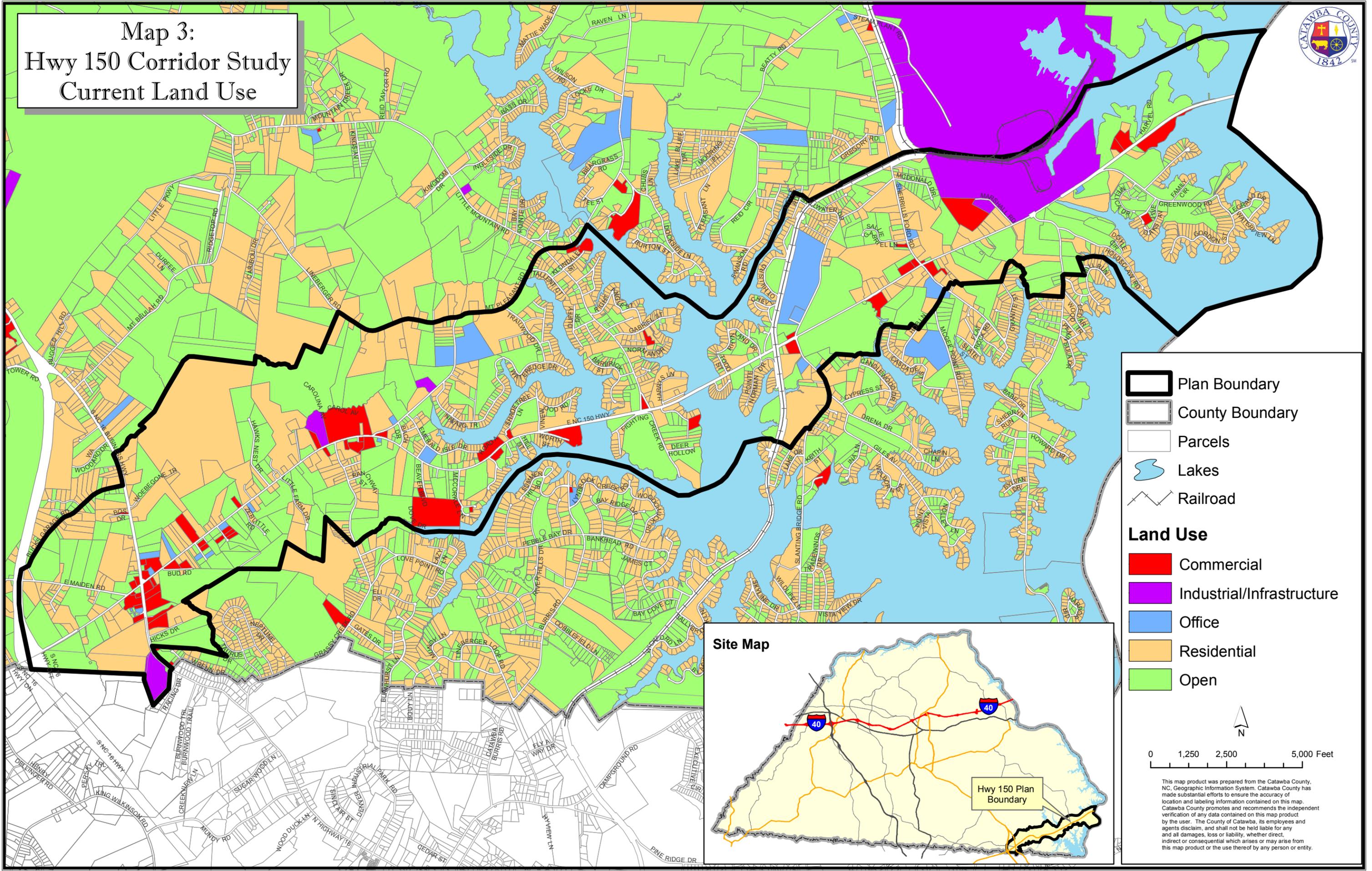
- LG-6 Allow greater opportunity for multi-family residential development in the Mixed Use Corridor-Overlay.
- LG-7 Allow business owners greater flexibility of commercial vehicle parking within the Mixed Use Corridor-Overlay.



**Plan Action Strategies (PASs)
Land Use**

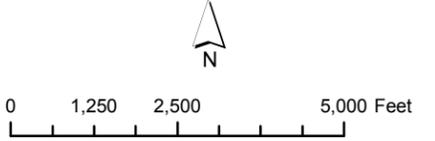
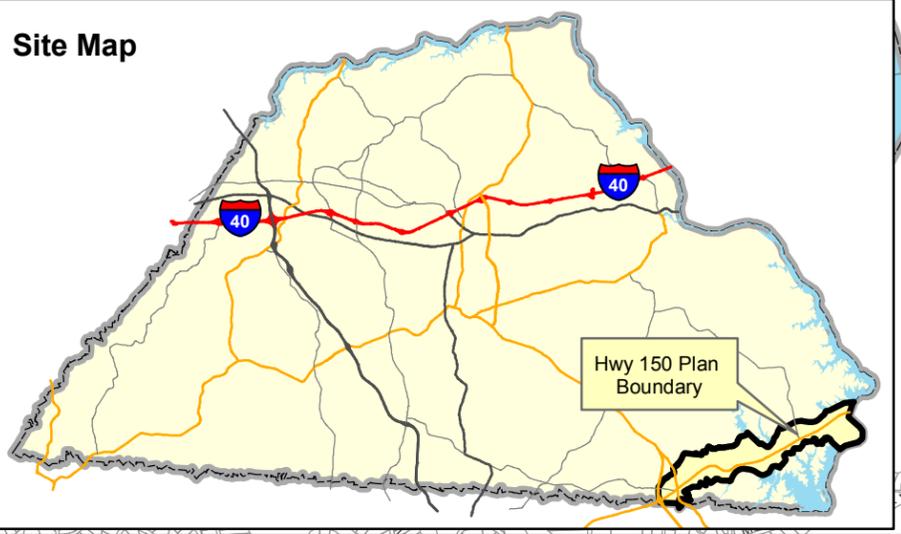
PASs #	CATEGORY	GOAL	LEAD AGENCY	ACTION STEPS	CHAPTER #	PRINCIPAL #	GOAL #	TIMEFRAME	PRIORITY
2	Land Use	Concentrate mixed-use, commercial, and multi-family development maintaining a high level of service along Hwy. 150 Highway and protect existing and future residential development.	Planning	Amend the Official Zoning Overlay Map by reconfiguring the Mixed Use Corridor-Overlay reflecting the areas designated for mixed-use, commercial, and multi-family development as depicted in Map 6, Future Land Use and Economic Opportunity and Map 7, Future Zoning Overlay.	3	LP-2 LP-3	LG-2	6 - 18 Months	H
3	Land Use	Allow additional uses, which are prohibited, in the Mixed Use Corridor-Overlay.	Planning	Amend Table 44-430.05.1 of the Unified Development Ordinance to allow wholesale distribution, industrial supply and equipment sales. Also, allow for high-density single family residential with connectivity to mixed use and commercial uses.	3	LP-4	LG-3	6 - 18 Months	M
4	Land Use	Allow increased flexibility in roof design within the Mixed Use Corridor-Overlay.	Planning	Amend Section 44-430.07(d) of the Unified Development Ordinance allowing for reduced roof pitches where facades in view of public roads do not contain metal or vinyl.	3	LP-4	LG-4	6 - 18 Months	M
5	Land Use	Provide greater flexibility in placement of structures within developments within the Mixed Use Corridor-Overlay.	Planning	Amend the Unified Development Ordinance by removing Table 44-430.06-1 and Figure 44-430.06-1.	3	LP-4	LG-5	6 - 18 Months	M
6	Land Use	Allow greater opportunity for multi-family residential development in the Mixed Use Corridor-Overlay.	Planning	Amend Section 44-430.08 of the Unified Development Ordinance to allow for multi-family developments even where commercial uses are not part of the development.	3	LP-1 LP-4	LG-6	6 - 18 Months	H
7	Land Use	Allow businesses owners greater flexibility of commercial vehicle parking within the Mixed Use Corridor-Overlay.	Planning	Remove Section 44-430.12(e) of the Unified Development Ordinance not restricting commercial vehicle parking in the Mixed Use Corridor-Overlay.	3	LP-4	LG-7	6 - 18 Months	L

Map 3: Hwy 150 Corridor Study Current Land Use



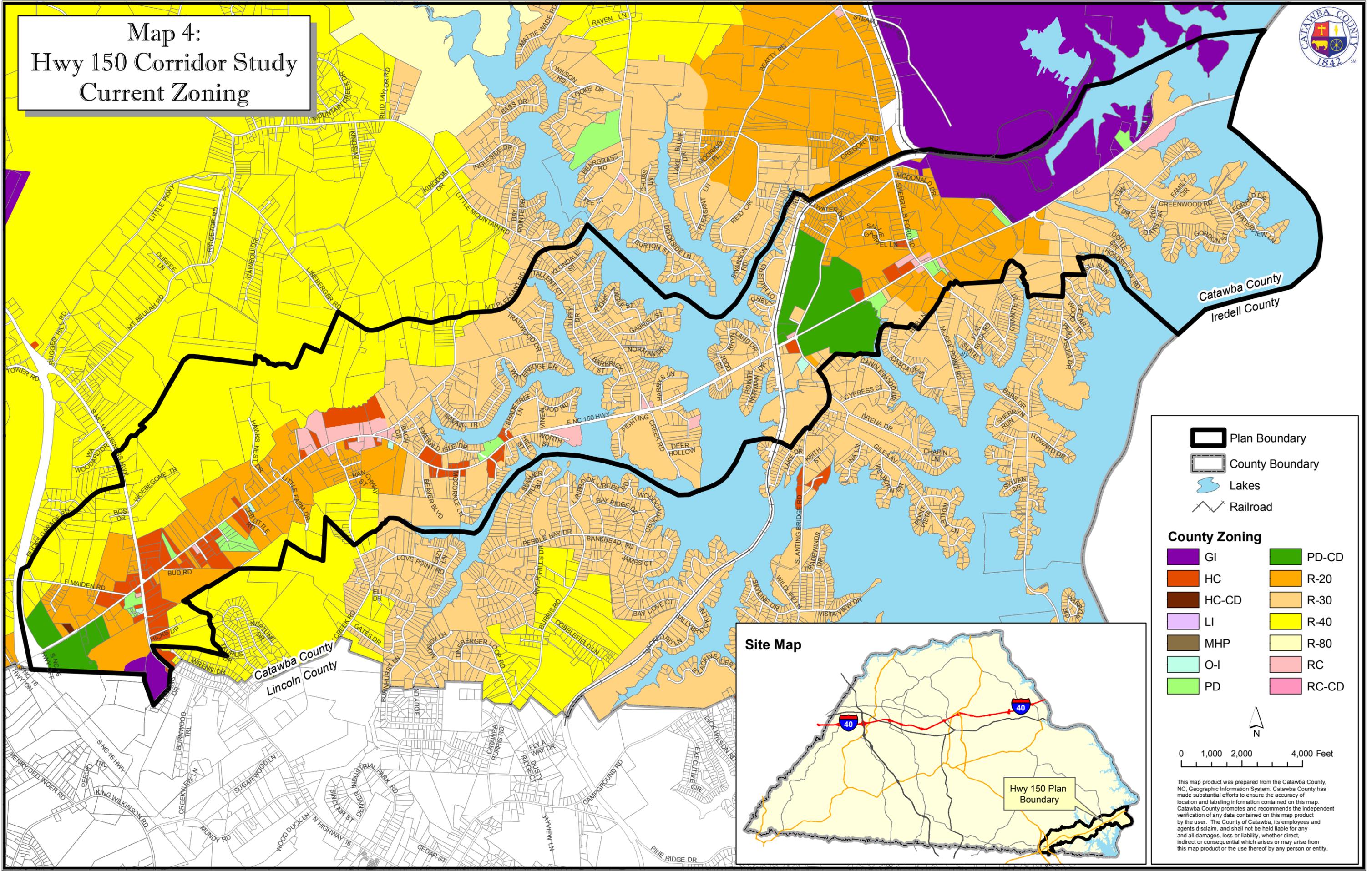
- Plan Boundary
- County Boundary
- Parcels
- Lakes
- Railroad
- Land Use**
- Commercial
- Industrial/Infrastructure
- Office
- Residential
- Open

Site Map



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Map 4: Hwy 150 Corridor Study Current Zoning



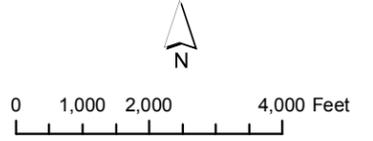
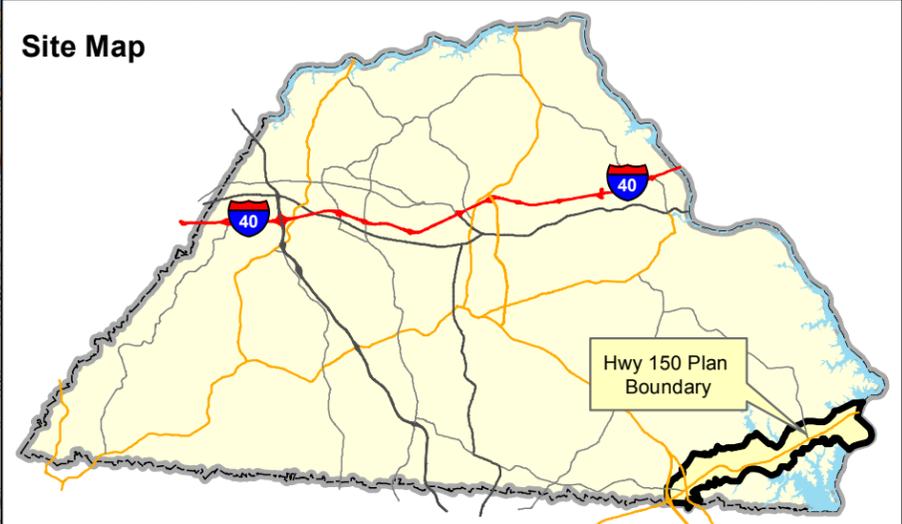
Catawba County
Iredell County

Catawba County
Lincoln County

- Plan Boundary
- County Boundary
- Lakes
- Railroad

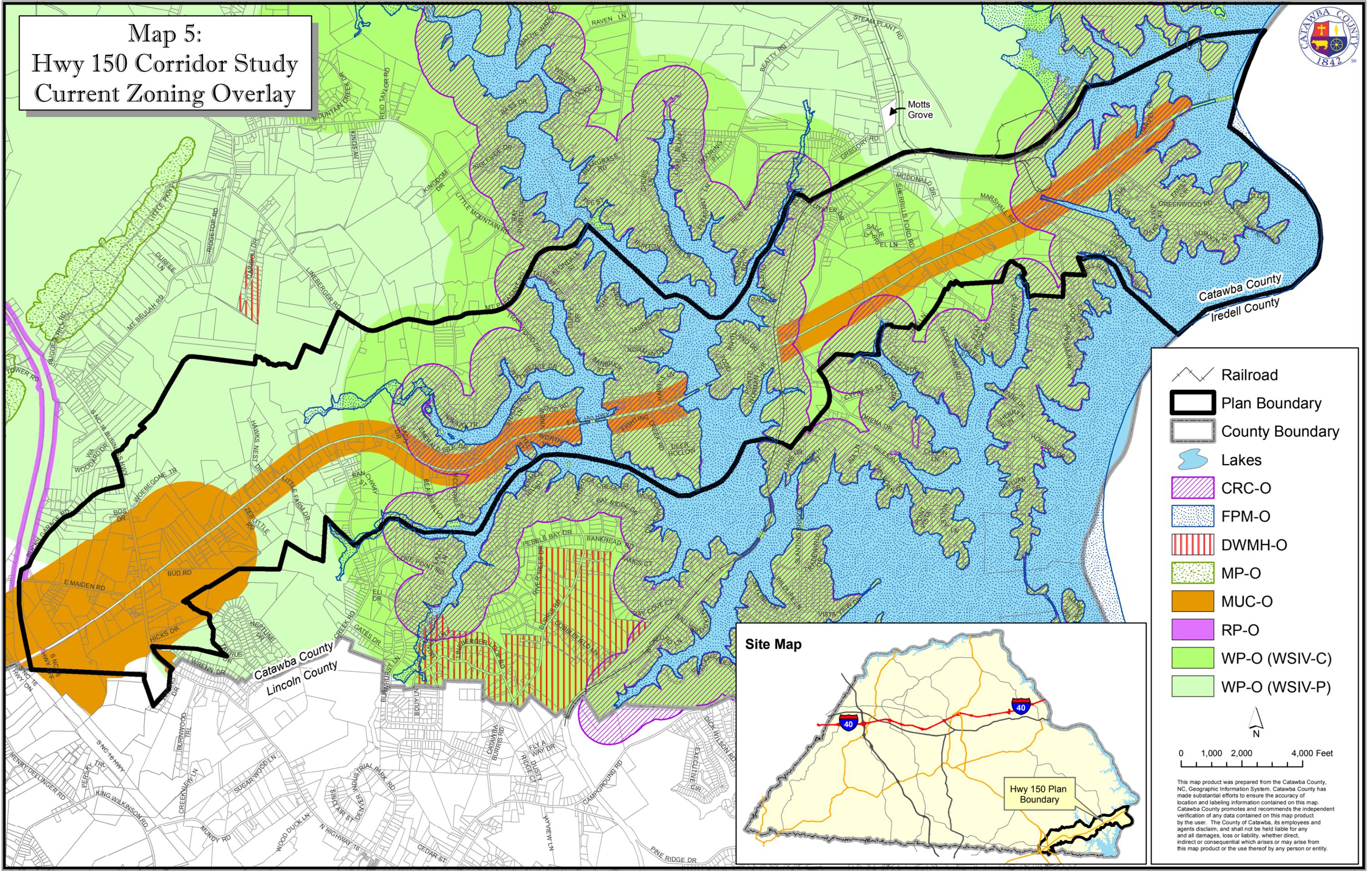
County Zoning

GI	PD-CD
HC	R-20
HC-CD	R-30
LI	R-40
MHP	R-80
O-I	RC
PD	RC-CD

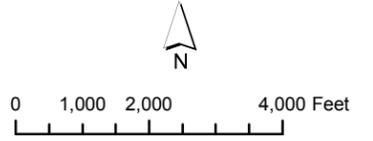
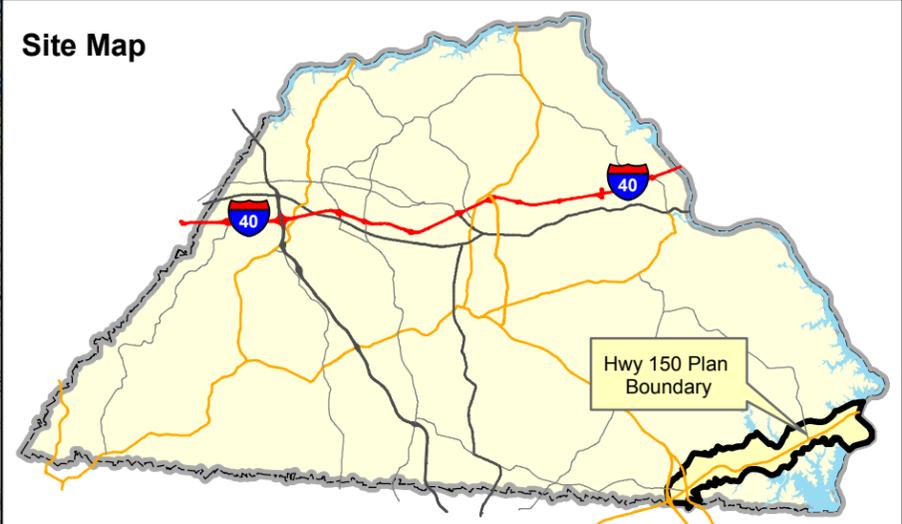


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Map 5: Hwy 150 Corridor Study Current Zoning Overlay

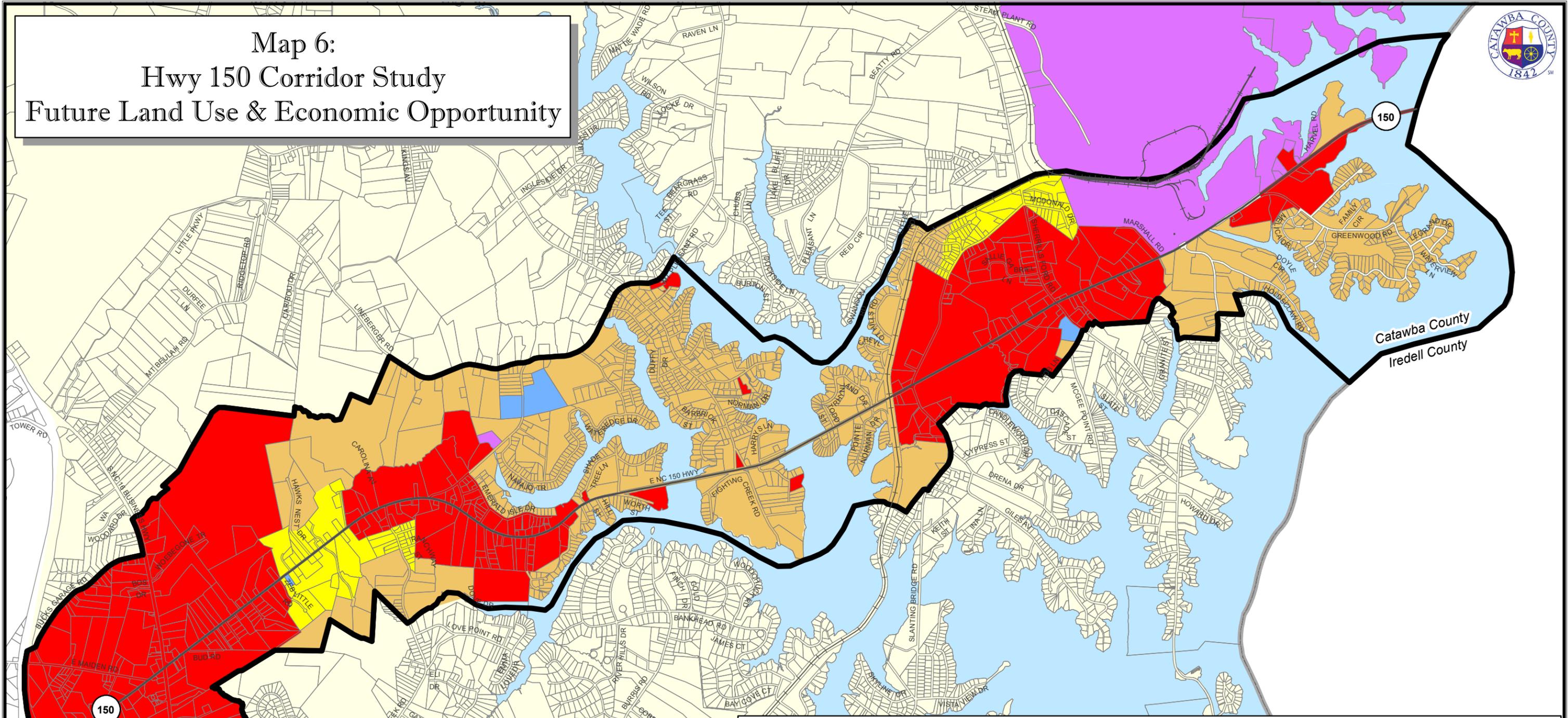


- Railroad
- Plan Boundary
- County Boundary
- Lakes
- CRC-O
- FPM-O
- DWMH-O
- MP-O
- MUC-O
- RP-O
- WP-O (WSIV-C)
- WP-O (WSIV-P)

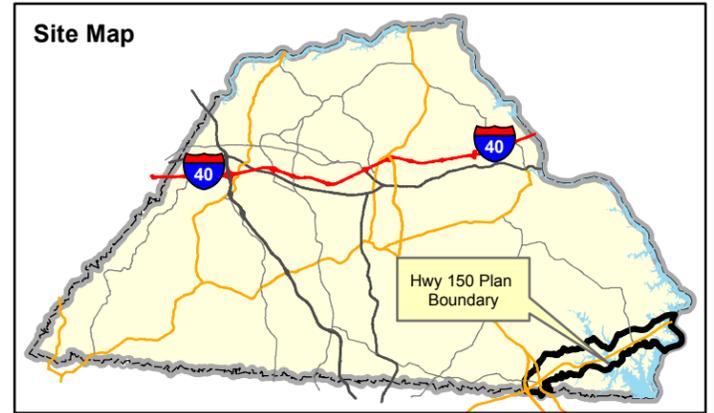


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Map 6: Hwy 150 Corridor Study Future Land Use & Economic Opportunity

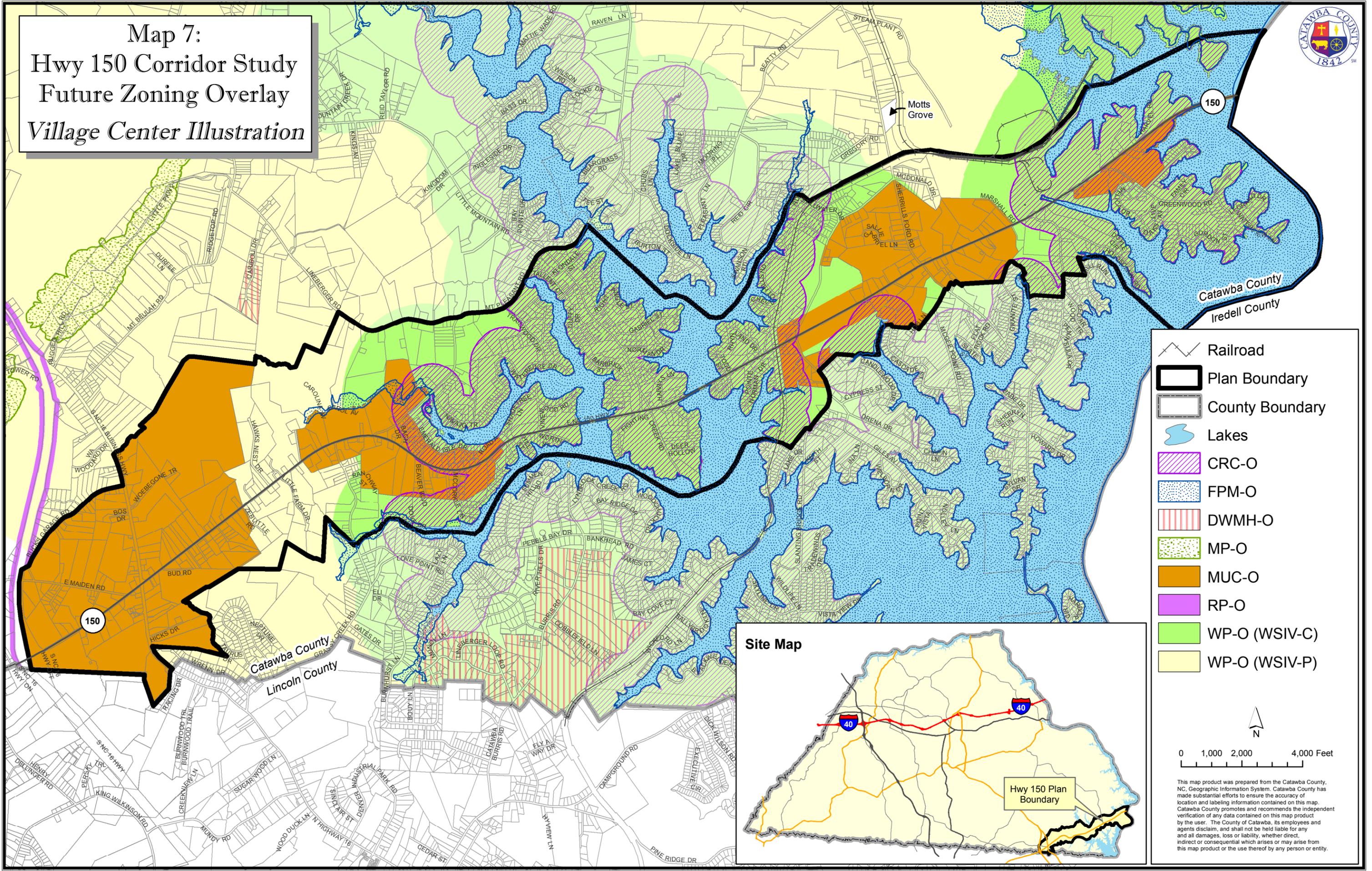


- County Boundary
- Plan Boundary
- Railroad
- Lakes
- Residential Density; 1.33 Dwelling Units Per Acre (R-30)
- Residential Density; 2 Dwelling Units Per Acre (R-20)
- Mixed Use/Commercial/Multi-Family
- Office/Institutional
- Industrial/Infrastructure

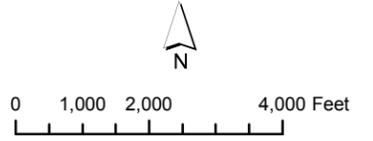
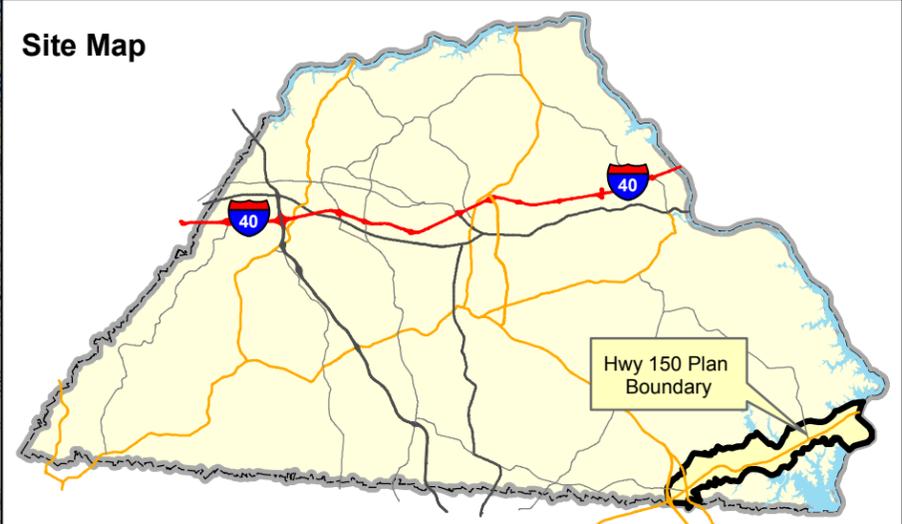




Map 7:
Hwy 150 Corridor Study
Future Zoning Overlay
Village Center Illustration



- Railroad
- Plan Boundary
- County Boundary
- Lakes
- CRC-O
- FPM-O
- DWMH-O
- MP-O
- MUC-O
- RP-O
- WP-O (WSIV-C)
- WP-O (WSIV-P)



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Transportation

ROADS AND HIGHWAYS

NC Hwy. 150 is a major-east-west thoroughfare that provides inter-county travel to five counties: Cleveland, Lincoln, Catawba, Iredell and Rowan. Major urban areas, including, Shelby, Lincolnton, Mooresville and Salisbury, are served by this highway. The section of Hwy. 150 in Catawba and Iredell counties also serves the fast-growing Lake Norman residential and commercial areas. The Hwy. 150 corridor also serves as an important transportation corridor for emergency and disaster response as part of the 10-mile Emergency Planning Zone (EPZ) for the McGuire Nuclear facility in Mecklenburg County.

The average daily traffic count (number of vehicles per day or ADT) on Hwy. 150 ranges from 8,300—15,000 ADT (see *Tables 4 and 5: Average Daily Traffic Count*). This places the highway at a Level of Service (LOS) B to F based upon its 2-lane practical carrying capacity of 12,100—14,860 ADT (note: LOS represents the relationship of traffic volumes to the capacity of the roadway with LOS A being free-flowing traffic and LOS F being beyond capacity where traffic is slowed/stopped at times).

Transportation

Roads and Highways	1
Pedestrian and Bicycle System	4
Transit System	6
Guiding Principles	6
Plan Goals	7

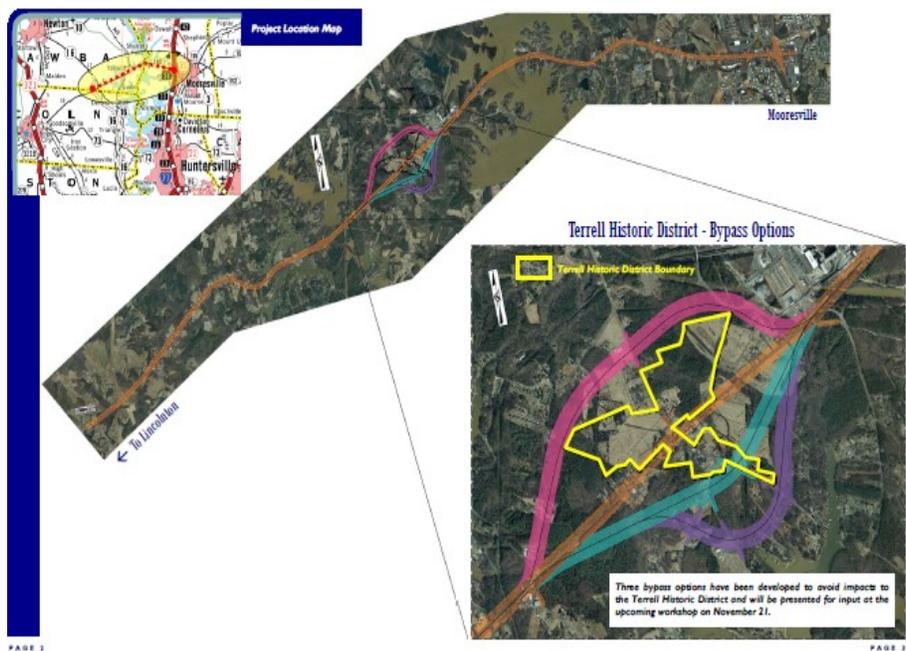


Table 4: Hwy 150 Corridor (Western Portion): Average Daily Traffic Count 2000-2040				
	Hwy. 150/16 Business—west of intersection	Hwy. 150/16 Business - east of intersection	Hwy. 150/Mt. Pleasant Road (SR 1849)	Hwy. 150/ Slanting Bridge Road (SR 1844) - west of intersection
2000	11,600	9,600	6,800	8,300
2004	12,000	9,700	11,000	10,000
2009	12,000	10,000	12,000	9,100
2011	12,000	9,800	11,000	8,700
2021	16,400	12,000	12,900	11,000
2030	20,300	17,900	19,700	16,000
2040	23,300	21,800	24,000	20,500

Table 5: Hwy. 150 Corridor (Eastern Portion): Average Daily Traffic Count 2000-2040				
	Slanting Bridge Road (SR 1844) - south of Hwy. 150	Hwy. 150/Sherrills Ford Road (SR 1848) - west of intersection	Sherrills Ford Road (SR 1848) - north of Hwy. 150	Hwy. 150/ Sherrills Ford Road (SR 1848) - east of intersection
2000	n/a	8,300	n/a	13,000
2004	6,300	13,000	6,400	18,000
2009	6,500	12,000	5,400	16,000
2011	6,600	11,000	5,200	15,000
2021	8,600	13,300	8,400	19,800
2030	11,500	19,200	7,500	25,500
2040	14,700	25,000	10,200	35,300

Source: NCDOT AADT Maps, 2003-2011; and 2040 Long Range Transportation Plan (for 2021, 2030 and 2040 projections)

Chapter 4 Transportation

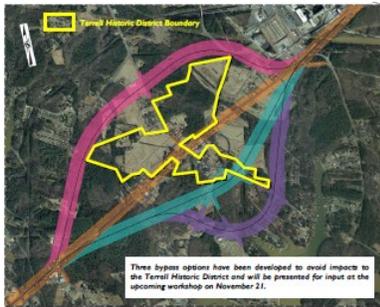
Even though traffic along Hwy. 150 grew significantly in the 1970's and 80's (almost 90% on the section east of Sherrills Ford Road), it has leveled out in the mid-2000s. This is representative of the traffic counts found throughout the Metropolitan Planning Organization (MPO) region. The downturn in the economy, with the resulting loss in jobs and reduction in disposable income, is the basis for the leveling of traffic counts in some estimations.

Transportation planning for the Hwy. 150 corridor plan area is coordinated by the Greater Hickory Metropolitan Planning Organization (GHMPO) and is administered by the Western Piedmont Council of Governments. The GHMPO was created from the Hickory-Newton-Conover MPO when the Hickory urban area expanded after the 2000 Census. As a result of the 2010 Census, the MPO Planning Area expanded to take in the southeastern portion of Catawba County, which now includes the Hwy. 150 corridor. Prior to this, the Hwy. 150 corridor was included in the region's Rural Planning Organization (RPO) planning area.

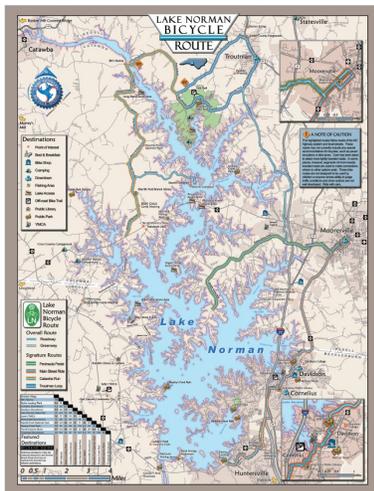
Future transportation needs for the Hwy 150 corridor area are included in the 2040 Greater Hickory Urban Area Long Range Transportation Plan, which was adopted in January 2014. This Plan is a multi-modal document which guides the planning and development of the urban area's transportation systems for a 25-year horizon period. The Transportation Plan lists Hwy. 150 as a "regionally significant project" and recommends widening the route to a multi-lane boulevard for its entirety in Catawba County. The boulevard design incorporates a center median which restricts movements to right-in and right-out turns and at grade crossings at major/minor cross streets. This design is based upon the North Carolina Department of Transportation's designation of the Hwy. 150 corridor as a "Strategic Highway Corridor" (SHC). The SHC initiative was established to protect and maximize the mobility and connectivity of a core group of highway corridors throughout North Carolina. NCDOT's long-term vision of the corridor is to engage local governments and other partnering agencies to have consistent land-use decision-making and to protect the corridor through access management.

Hwy. 150 is listed in NCDOT's draft 2013-23 State Transportation Improvement Program (STIP) as project

Chapter 4 Transportation



NCDOT Terrell bypass options



Lake Norman Bicycle Route Plan

#R-2307. The STIP proposes to widen Hwy. 150 from the NC 150/I-77 interchange in Iredell County to the NC 16 Bypass in Catawba County, which is approximately 13.5 miles in length. The project is broken into two segments, with Segment A being entirely in Catawba County and Segment B being from Harvel Road (SR 1902) in Catawba County to I-77 in Iredell County. The draft STIP indicates that right-of-way acquisition for Segment B will begin in FY 2017 and in 2020 for Segment A. Construction would then begin in FY 2019 for Segment B and FY 2023 for Segment A (note: as part of NCDOT's 2013 Strategic Prioritization program, the Hwy. 150 widening project will be re-evaluated for funding priority in mid-2014 which could affect this schedule).

NCDOT formally began the design process for the widening of Hwy. 150 with the sponsoring of a public hearing on November 21, 2013. At the hearing, NCDOT presented maps showing the planning corridor with the existing road alignment along with alternate routes to bypass the Terrell Historic District. Two of the bypass alternates go south of the Hwy.150/Sherrills Ford Road intersection and one goes north. These alternate routes and widening of the existing location are being evaluated by NCDOT. It is anticipated that environmental documents will be available in the summer of 2015 with a draft design corridor and public workshop in late 2015.

PEDESTRIAN AND BICYCLE SYSTEM

Pedestrian and bicycle system planning for the County has been conducted over the last several years and is formulated in several documents: The Greater Hickory Recreation/Tourism Plan (2006), Catawba County Master Parks and Recreation Plan (2007), the Lake Norman Bicycle Route Plan (2010) and the Carolina Thread Trail Master (CTT) Trail Plan for Catawba County Communities (2010). These plans have identified several pedestrian and bicycle trail segments within the corridor. Both the Lake Norman Bicycle Route Plan and the Carolina Thread Trail plan endorse the concept of a bicycle route encircling Lake Norman which allows all types of users to experience a safe and enjoyable travel around the lake. While the segments proposed within Catawba County are on-road routes, as new development occurs

Chapter 4 Transportation

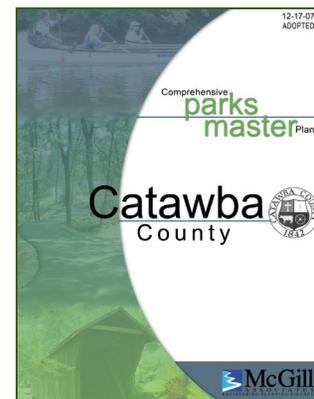
with the area, there will be opportunities for off-road trails. Also key to both plans is the interconnectivity to the adjoining counties of Iredell and Lincoln. The initial route for the Lake Norman Bicycle Plan does not utilize Hwy. 150 for safety reasons. The ultimate plan does include Hwy. 150 when the road is widened, subject to funding, and incorporates a multi-purpose path.



The Lake Norman Bicycle Plan currently includes a signed route which runs on Slanting Bridge Road north of Hwy. 150. This route travels north to Sherrills Ford Road. It ultimately parallels Lake Norman on Kale Road to the cross-county connection at the Hudson Chapel Road bridge over the Lake.

The proposed pedestrian and bicycle facilities within the Plan area are shown on *Map 8: Transportation/Multi-modal Recommendations*.

In order to implement the planned pedestrian and bicycle facilities, Catawba County's Unified Development Ordinance (UDO) requires improvements for new development. Pedestrian walkway construction in new residential development is required when 25 or more lots are proposed within the R-20 or higher density districts. For less dense residential development, open space is required with a portion to be improved as a trail system. In addition, pedestrian improvements are required for new commercial development where the property fronts a road. This provision is included in the County's adopted Unified Development Ordinance. A fee-in lieu of option in place of pedestrian improvement construction or the provision of open space may be allowed by the County. These funds would be used for installation of sidewalks, trails, bicycle paths or capital projects based upon the identified needs in the adopted bicycle/pedestrian plans. The UDO also requires properties in the Mixed Use Corridor Overlay (MUC-O) along Hwy. 150 to provide for pedestrian travel between building clusters within new developments. Bicycle parking facilities are required in the UDO when non-residential and multi-family developments are located within 500 feet of bicycle corridors in officially adopted bikeway plans. It is the policy of the MPO and NCDOT to evaluate any new road construction project for potential pedestrian needs and bicycle accommodations. This coordination particularly has been emphasized with the widening of Hwy. 150 (R-#2307).





Greenway Transit system

TRANSIT SYSTEM

A consolidated public transportation system was established in 2008; whereby, the community transportation network provided by the Piedmont Wagon Transit System was combined with the other Unifour systems to become the Western Piedmont Regional Transit Authority. The new system now operates under the Greenway Public Transportation program providing limited transit services to the Plan area. Vans are available five days per week to transport senior citizens and disabled residents; however, no fixed Greenway routes currently exist in the Plan area.

GUIDING PRINCIPLES

ROADS & HIGHWAYS

- TP-1 Anticipate and plan for growth that will result from road, bridge, improvements and widening.
- TP-2 The right-of-way for new roads or widening of existing roads should be protected when new developments are approved.
- TP-3 Coordinate transportation policies with land use policies.
- TP-4 Encourage alternate modes of transportation, including increased use of existing means such as public buses, school buses, railroads, bicycles and pedestrian.
- TP-5 Provide for safe roads and intersections and scenic roadways.
- TP-6 Provide for interconnection of new developments and where practical, to existing neighborhoods.



Pedestrian—Sidewalk System

PEDESTRIAN SYSTEM

- TP-7 Provide safe alternatives for pedestrians.

BICYCLE SYSTEM

- TP-8 Provide safe options for bicyclists.

TRANSIT SYSTEM

TP-9 Increase opportunities to link with existing transit routes.

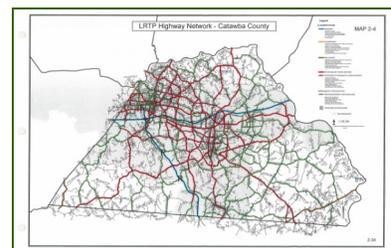
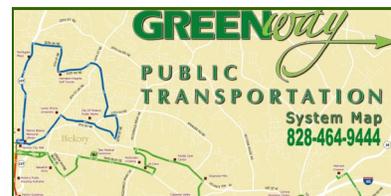
PLAN GOALS

In the State of North Carolina, counties do not construct or maintain roads; therefore, the following recommendations will be forwarded to NCDOT or used in area-wide transportation planning. The transportation goals are depicted on *Map 8: Transportation/Multi-modal Recommendations*. Note: A Transportation Goal (TG) reference number is depicted on the map representing site specific projects.

- TG-1 Construct a multi-purpose path during the widening of the Hwy. 150 corridor.
- TG-2 Establish the existing route as the preferred alternative through the Terrell Historic District at the existing Hwy. 150 location.
- TG-3 Employ traffic calming techniques between Sherrills Ford Road and Slanting Bridge Road.
- TG-4 Preserve future right-of-way for the widening of Hwy. 150 when new developments are proposed.
- TG-5 Ensure that necessary turn lanes, acceleration lanes and deceleration lanes are constructed for new developments.
- TG-6 Ensure that mass transit is provided within the corridor, as demands dictate.
- TG-7 Request NCDOT to install mast poles when replacing or installing new traffic signals.
- TG-8 Reduce the speed limit on Slanting Bridge Road and Mt. Pleasant Road (from Little Mountain Road to Hwy. 150) to 45 mph.
- TG-9 Evaluate the alignment of the following intersections:
 - 1) Sherrills Ford Road/Slanting Bridge Road
 - 2) Hwy. 150/Mt. Pleasant Road



Sidewalk construction



Long Range Transportation Plan
Catawba County

Chapter 4 Transportation

3) Hwy. 150/Greenwood

- TG-10 Evaluate the intersection of Hwy. 150 and Grassy Creek Road for signalization.
- TG-11 Provide a welcoming gateway into the County for westbound traffic at the Lake Norman bridge.
- TG-12 Request NCDOT to consider designing an elevated Lake Norman bridge in order to provide larger boat access to the northern portion of the lake.
- TG-13 Remove barriers that will impede the widening of Hwy. 150.

Plan Action Strategies (PASs)

Transportation

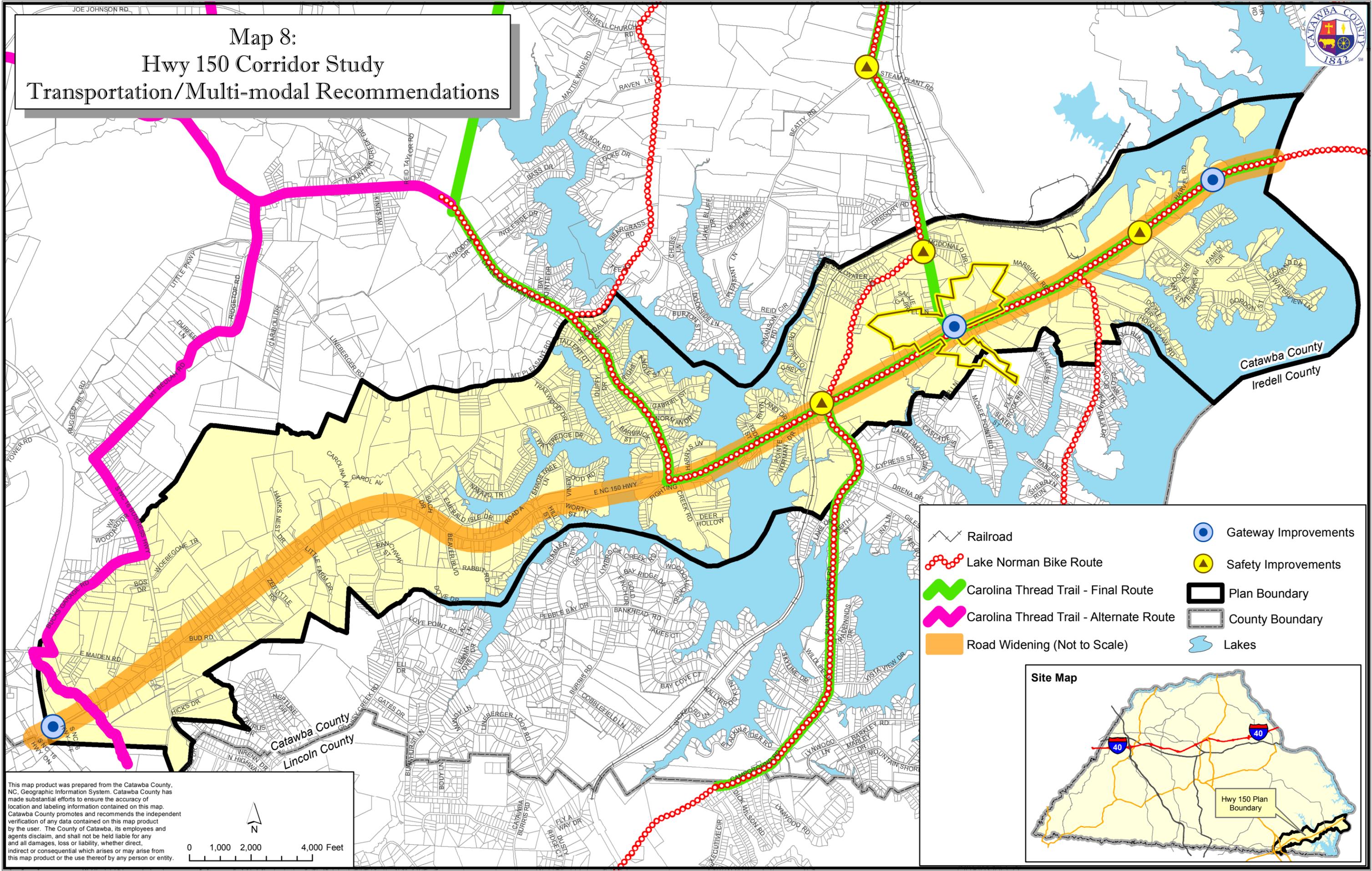
PASs #	CATEGORY	GOAL	LEAD AGENCY	ACTION STEPS	CHAPTER #	PRINCIPAL #	GOAL #	TIMEFRAME	PRIORITY
8	Transportation	Construct a multi-purpose path during the widening of the Hwy. 150 corridor.	Planning	Continue to correspond with NCDOT to ensure that the multi-purpose path design is incorporated into TIP #R-2307. As the TIP project is funded, if insufficient funds are provided, work with the MPO to apply for CMAQ funds for simultaneous construction of the project.	4	TP-4, 7, 8	TG-1	3 - 6 Months	H
9	Transportation	Established the preferred route at the Terrell Historic District on the existing Hwy. 150 location.	Planning	Work with property owners at the intersection of Hwy. 150 and Sherrills Ford Road along with NCDOT to identify alternatives that will allow for the road widening section to remain at the current location. This could include a reduced cross-section and/or re-location of exiting buildings.	4	TP-3, 5	TG-2	3-6 months	H
10	Transportation	Employ traffic calming techniques between Sherrills Ford Road and Slanting Bridge Road.	Planning	Continue to correspond with NCDOT to evaluate a 45 mph design speed for the section between Sherrills Ford Road and Slanting Bridge Road.	4	TP-5,6	TG-3	3-6 months	H
11	Transportation	Preserve future right-of-way for the widening of Hwy. 150 when new developments are proposed.	Planning	Meet with NCDOT to stress the importance of obtaining a definitive set of cross-section drawings for the Hwy. 150 widening project which can be used by developers and the County for planning purposes.	4	TP-1,2	TG-4	3-6 months	H
12	Transportation	Ensure that necessary turn lanes, acceleration lanes and deceleration lanes are constructed for new developments.	Planning	When discussions are being held with developers for new projects in the corridor, contact NCDOT to begin conversations on the required entrance improvements .	4	TP-3	TG-5	Ongoing	H
13	Transportation	Ensure that mass transit is provided for within the corridor.	Planning	Meet with CATS (Charlotte Area Transit Authority) and the Western Piedmont Regional Transit Authority (WPRTA) to determine the best locations for Park and Ride lots along the Hwy. 150 corridor. Then require the construction of Park and Ride lots upon approval of large-scale developments at those locations. Meet with the WPRTA as growth occurs to develop new routes to service the area.	4	TP-4,9	TG-6	6-18 months	H
14	Transportation	Request NCDOT to install mast poles when replacing or installing new traffic signals.	Planning	Correspond with NCDOT to ensure that mast poles are installed for new and future projects. This can also be discussed through the Council of Planning with a consistent request from the local governments along the corridor.	4	TP-5	TG-7	18 months - 3 years	M
15	Transportation	Reduce the speed limit on Slanting Bridge Road and Mt. Pleasant Road (from Little Mountain Road to Hwy. 150) to 45 mph.	Planning	Correspond with NCDOT to request a reduction of the speed limits on Slanting Bridge Road and Mt. Pleasant Road from Little Mountain Road to Hwy. 150.	4	TP-5	TG-8	6-18 months	M
16	Transportation	Evaluate the alignment of the following intersections: 1) Sherrills Ford Road/Slanting Bridge Road, 2) Hwy. 150/Mt. Pleasant Road, and 3) Hwy. 150/Greenwood Road.	Planning	Correspond with NCDOT to request a study to evaluate the intersection alignments at Sherrills Ford Road/Slanting Bridge Road and Hwy. 150/Mt. Pleasant Road.	4	TP-5	TG-9	6-18 months	M
17	Transportation	Evaluate the intersection of Hwy. 150 and Grassy Creek Road for signalization.	Planning	Correspond with NCDOT to request a traffic signalization study at the intersection of Hwy. 150 and Grassy Creek Road.	4	TP-5	TG-10	6-18 months	M

**Plan Action Strategies (PASs)
Transportation**

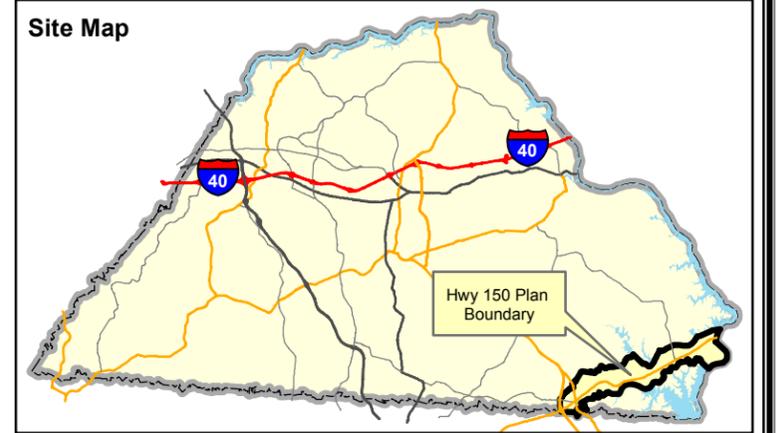
PASs #	CATEGORY	GOAL	LEAD AGENCY	ACTION STEPS	CHAPTER #	PRINCIPAL #	GOAL #	TIMEFRAME	PRIORITY
18	Transportation	Provide a welcoming gateway into the County for westbound traffic at the Lake Norman bridge.	Planning	Identify potential grant sources to develop a gateway corridor with consistent signage and landscaping at the westbound lane of Hwy. 150 at the Lake Norman bridge.	4	TP-5	TG-11	5-10 years	L
19	Transportation	Request NCDOT to consider designing an elevated Lake Norman bridge in order to provide larger boat access to the northern portion of the lake.	Planning	Request NCDOT to consider designing an elevated Lake Norman bridge in order to provide fire boats, work vessels, tourist boats, family overnight vessels and sail boating access to the northern portion of the lake.	4	TP-1	TG-12	6-18 months	M
20	Transportation	Remove barriers that will impede the widening of Hwy. 150.	Council of Planning	Work with Iredell County and Mooresville to coordinate Hwy. 150 improvements, regulations, and land uses similar to the Hwy. 73 Corridor Council of Planning.	4	TP-1 TP-2 TP-3	TG-13	Ongoing	H



Map 8: Hwy 150 Corridor Study Transportation/Multi-modal Recommendations



- Railroad
- Lake Norman Bike Route
- Carolina Thread Trail - Final Route
- Carolina Thread Trail - Alternate Route
- Road Widening (Not to Scale)
- Gateway Improvements
- Safety Improvements
- Plan Boundary
- County Boundary
- Lakes



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Public Services and Community Facilities

Public Services and Community Facilities

Schools	1
Libraries	4
Public Safety	4
Water Service	5
Sewer Service	5
Guiding Principles	5
Plan Goals	6

SCHOOLS

The Plan study area includes portions of the Sherrills Ford, Balls Creek, and Tuttle Elementary School districts. Students in the eastern and central portion of the study area are currently assigned to Sherrills Ford Elementary. Elementary students in the west central portion of the plan area are currently assigned to Balls Creek Elementary. Students in the Sherrills Ford and Balls Creek Elementary districts attend Mill Creek Middle School and Bandy’s High School. Students in the western most portion of the study area are assigned to Tuttle Elementary and attend Maiden Middle School and Maiden High School. *See Map 9: Existing Public Use Facilities.*



In 1999, the Catawba County, Hickory, and Newton-Conover Schools systems commissioned the Western Piedmont Council of Governments to develop the *Catawba County Growth Estimation Model*. This model identified and examined various factors and trends that impact student population and helps plan for future school facilities. The model was updated in 2010.

SHERRILLS FORD ELEMENTARY SCHOOL

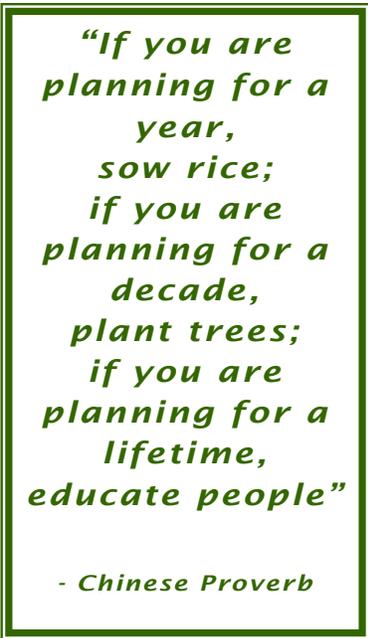
Data for the *Catawba County Growth Estimation Model* (2010) shows that the student population at Sherrills Ford Elementary School is at 93.1% building capacity (613 students) for school year 2013-2014 and is projected to remain near capacity in year 2019-2020.

BALLS CREEK ELEMENTARY

Data for the *Catawba County Growth Estimation Model* (2010) shows that there is a current population of 642 students at Balls Creek Elementary School. The school is at 88% capacity (715 students) and is estimated to remain under capacity through 2019-2020.

TUTTLE ELEMENTARY

Data for the *Catawba County Growth Estimation Model* (2010) shows that there is a current student population of 553 at Tuttle Elementary School. The school is at 99% capacity and is expected to remain near building capacity (558 students) through 2019-2020.



MILL CREEK MIDDLE

Data for the *Catawba County Growth Estimation Model* (2010) shows that there is a current student population of 491 at Mill Creek Middle School. The school is at 74% capacity (664 students) and is projected to decrease through 2019-2020.

MAIDEN MIDDLE

Data for the *Catawba County Growth Estimation Model* (2010) shows that there is a current student population of 476 at Maiden Middle School. The school is at 96.2% capacity (495 students) and is projected to be near capacity in 2019-2020.

BANDY'S HIGH SCHOOL

Data for the *Catawba County Growth Estimation Model* (2010) shows that there is a current student population of 862 at Bandy's High School. The school is at 77% capacity (1,120 students) and is projected to remain below capacity through 2019-2020.

MAIDEN HIGH SCHOOL

Data for the *Catawba County Growth Estimation Model* (2010) shows that there is a current student population of 857 at Maiden High School. The school is at 81.2% capacity (1,055 students) and is projected to remain below capacity through 2019-2020.

growth principals. This model calls for smaller schools that fit into the neighborhoods they serve, encourages community involvement at the planning stage, enables schools to act as a neighborhood anchor, and provides after hours community facilities and activities. This approach also provides opportunities for multi-use campuses with public/private services such as, a daycare, library, public safety, parks and recreation facilities, located on the same tract of land or in close proximity to the school. While traditional neighborhood schools were historically developed in urban areas, many of the principles can work around the fringes of urban centers where public infrastructure, higher density, and mixed-use developments are planned.



LIBRARIES

Catawba County operates a well-established library system with one central library and six branch libraries. The majority of the plan area is served by the Sherrills Ford Branch Library. Catawba County is in the process of constructing a new Sherrills Ford Library located within the study area along Sherrills Ford Road near the its intersection with Hwy. 150. *See Map 9: Public Facilities & Utilities.*



PUBLIC SAFETY

EMERGENCY MEDICAL SERVICES

An EMS base is located within the study area, located near the intersection of Hwy. 150 and Mt. Pleasant Road. The Catawba and Bandy's EMS bases offer secondary responses to calls within the Plan area. *See Map 9: Public Facilities & Utilities.*



LAW ENFORCEMENT

The Catawba County Sheriff's Department serves the plan area. The patrol division includes fifty officers of which four serve the Terrell area. The Sheriff's Department also operates a jail and maintains security for the court system in Catawba County. Crime prevention, investigations and civil enforcement are other functions conducted by the Sheriff's Department.

FIRE PROTECTION

There are two primary fire stations within plan study area and two additional stations outside of the area offering fire protection. Also, Bandy's Station 3 offers mutual aid to the Hwy. 16/150 area when necessary. The eastern area of the plan is served by the Headquarters Station located on Slanting Bridge Road. The western portion is served by the station located near the intersection of Hwy. 150 and Mt. Pleasant Road. *See Map 9: Public Facilities & Utilities.*

WATER SERVICE

Water service is available along Hwy. 150, Sherrills Ford Road, Hwy. 16 Business, and in some cases within subdivisions located off of Hwy. 150. The water lines are owned by the County and maintained and operated by the City of Hickory. *See Map 9: Public Facilities & Utilities.*

SEWER SERVICE

Sewer service is being installed along Hwy. 150 just east of Sherrills Ford Road to Hwy. 16 Bypass and is scheduled to be complete in June 2014. The sewer system is owned by the County and operated and maintained by the City of Hickory. The sewer line is also being extended along Slanting Bridge Road between Sherrills Ford Road and Hwy. 150. The system has been designed to accommodate long term growth along the corridor. *See Map 9: Public Facilities & Utilities.*

GUIDING PRINCIPLES

SCHOOLS

- PP- 1 Plan to accommodate student enrollment growth.
- PP- 2 Plan for community-based, neighborhood schools in a mixed use development.

LIBRARIES

PP- 3 Maintain and plan for an adequate level of library services for the community.

WATER/SEWER SERVICES

PP-4 Provide water and sewer services in higher density areas. (Note: As new development occurs in high-density areas, developers are required to extend utility lines based upon the County's Water and Sewer Availability Ordinance.)

EMERGENCY SERVICES

PP-5 Maintain existing levels of service and expand those services as demand requires.

PP-6 Consider ways to expand emergency facilities by locating them with existing or future public facilities.

PLAN GOALS

SCHOOLS

PG-1 Base the development of new school facilities upon the Community Oriented Schools approach using a collaborative process involving the community, key stakeholders, and school officials.

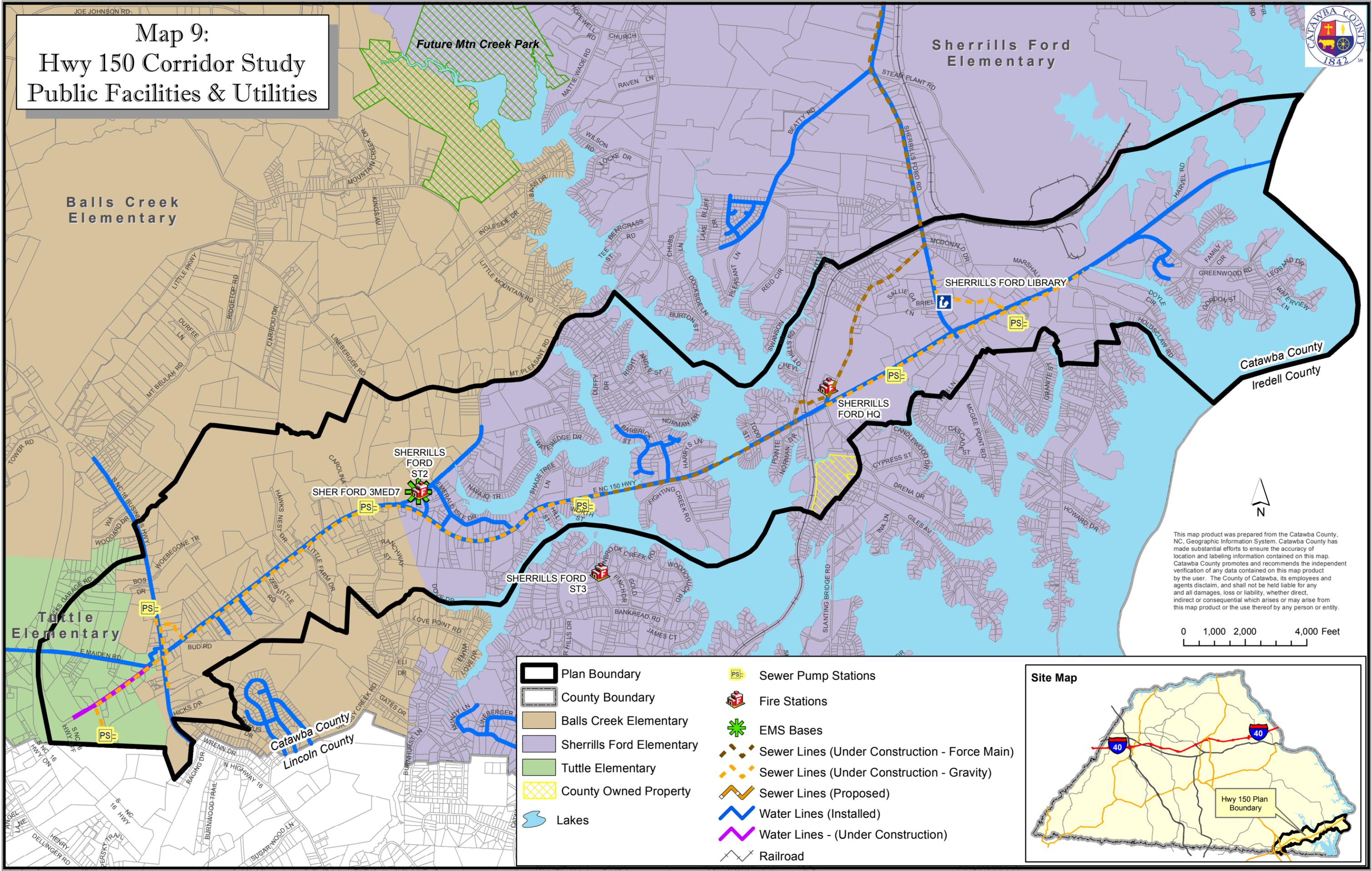
PUBLIC FACILITIES

PG-2 Explore options for locating future public library facilities, medical clinics, and other facilities on school sites or within mixed use development.

**Plan Action Strategies (PASs)
Public Services and Community Facilities**

PASs #	CATEGORY	GOAL	LEAD AGENCY	ACTION STEPS	CHAPTER #	PRINCIPAL #	GOAL #	TIMEFRAME	PRIORITY
21	Public Services	Base the development of new school facilities upon the Community Oriented Schools approach using a collaborative process involving the community, key stakeholders, and officials.	Catawba County Schools and Planning	Assist the school system in order to determine the feasibility of locating a new Community Oriented school within the Plan boundary.	5	PP-1 PP-2	PG-1	Ongoing	H
22	Public Services	Explore options for locating future public library facilities, medical clinics, and other facilities on school sites or within mixed use development.	Planning and Library Services	Explore the feasibility of funding and ownership options for constructing and managing school facilities, onsite recreational facilities, and other public and private services.	5	PP- 3 PP-5 PP-6	PG-2	Ongoing	H

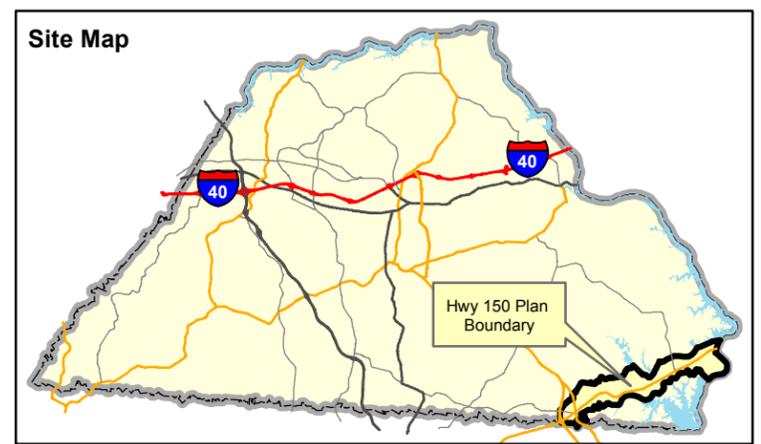
Map 9: Hwy 150 Corridor Study Public Facilities & Utilities



This map product was prepared from the Catawba County, NC, Geographic Information System. Catawba County has made substantial efforts to ensure the accuracy of location and labeling information contained on this map. Catawba County promotes and recommends the independent verification of any data contained on this map product by the user. The County of Catawba, its employees and agents disclaim, and shall not be held liable for any and all damages, loss or liability, whether direct, indirect or consequential which arises or may arise from this map product or the use thereof by any person or entity.

0 1,000 2,000 4,000 Feet

- Plan Boundary
- County Boundary
- Balls Creek Elementary
- Sherrills Ford Elementary
- Tuttle Elementary
- County Owned Property
- Lakes
- Sewer Pump Stations
- Fire Stations
- EMS Bases
- Sewer Lines (Under Construction - Force Main)
- Sewer Lines (Under Construction - Gravity)
- Sewer Lines (Proposed)
- Water Lines (Installed)
- Water Lines - (Under Construction)
- Railroad



Natural / Cultural Resources and Open Space

Natural / Cultural Resources and Open Space

Natural Resources	1
Open Space	3
Recreational Opportunities	4
Cultural / Historic Resources	4
Guiding Principles	9
Plan Goals	10

NATURAL RESOURCES

The Catawba River and Lake Norman, along with its many tributaries help define the character of the Hwy. 150 study area. Lake Norman was created in 1967 when Duke Power Company built the Cowan’s Ford Dam on the Catawba River between Mecklenburg and Lincoln Counties. Since that time Lake Norman has helped drive development in the region.

The Catawba River mainstream, which divides Catawba County from Iredell County, forms the eastern boundary of the study area. Continuing west, Hwy. 150 crosses two Lake Norman tributaries, traverses additional land in Catawba County and ends at the Lincoln County line.



East Entrance to Study Area

Positive impacts that the lake has had on the area goes beyond recreation. Access to the water has created a highly desirable location for residential developments. Lake Norman has also brought visitors (fishermen, boaters, vacationers, etc.) to Catawba County.

Species of fish in Lake Norman include Largemouth Bass, Bluegill, Striped Bass, Yellow Perch, Channel Catfish and Crappie. The NC Wildlife Resources Commission stocked the lake earlier this year with hybrid bass and expects to do so for the next several years.



Development along the Lake



Barred Owl



Lake Cattails



Lake Norman

Bird species in the corridor area include Bald Eagles, Osprey, Red Tailed Hawk, Ring Billed Gull, Great Blue Herrin, Barred Owl, King Bird, Orchard Oriole, and Barn and Cliff Swallows, among others. Lake plants include Pickerel Rush, Cattails, Creeping Water Primrose, and Spatterdock. Land plants in the corridor include a mixture of deciduous and evergreen plants and an assortment of field crops and grassland.

Since much of the region's drinking water comes from the Catawba River, regulations have been put in place to protect the water quality of the river. Land area extending 500 feet from the Catawba River mainstream, and land area 1,000 feet from the high water elevation of Lake Norman are located in the Catawba River Overlay District (CRC-O).

Because this area is ecologically sensitive, it must be protected from pollution caused by erosion sedimentation, agricultural and industrial runoff, and natural or manmade obstruction. As such, development within the first 50 feet must comply with the State's Catawba River Basin Riparian Buffer Rules as enforced by the North Carolina Department of Environment and Natural Resources (NCDENR). The minimum residential lot size within the CRC-O is 30,000 square feet for conventional subdivisions, and minimum lot width for waterfront lots is 100 feet. Non-residential and multi-family development must use Low Impact Development (LID) techniques.

Since the Catawba River provides water for residence of the City of Mooresville, Charlotte-Mecklenburg, and Lincoln County, watershed rules were also put in place to help protect this sensitive area. To ensure water quality, the State of North Carolina enacted the Water Supply Watershed Protection Program in 1989. The program requires all local governments with land use planning jurisdiction in designated watersheds to administer a Water Supply Watershed Protection Ordinance to protect surface drinking water.

The area within one-half mile of the lake is designated as the WS-IV Critical Watershed, mandating minimum 20,000 square foot lots for conventional single family development, and a maximum 24% built upon area for multi-family and nonresidential development.

Beyond the critical area is the WS-IV Protected Area Wa-

Chapter 6 Natural / Cultural Resources and Open Space

tershed. Regulations mandate minimum 20,000 square foot lots without public water or sewer, or 15,000 square foot lots with public water or sewer for conventional single family development, without curb and gutter streets. Multi-family and non-residential uses are limited to 24% impervious coverage of a lot with curb and gutter, and 36% without curb and gutter. Within the Protected Area, planned developments may use the high-density option of 70% impervious coverage with stormwater controls if a “5%/70% Bonus” permit is approved by the Catawba County Board of Adjustment.



Farm in Corridor

OPEN SPACE

The Hwy. 150 Corridor Plan Study Area is located within the Sherrills Ford Small Area Plan (SAP). The plan indicates that residents value open space, protection of natural features, preservation of farmland, and environmentally sensitive development.

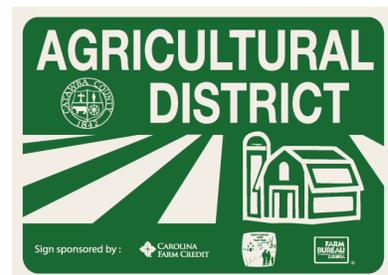
In order to help preserve agricultural and forest lands, the County adopted a Voluntary Agricultural District (VAD) program in 2008. The program allows landowners to voluntarily enter their property into an agricultural district which recognizes the property as farmland and commits the landowner to retain the property as active agricultural land. In exchange, signs are located on the farmland which identifies the property as an agricultural district, and notice is provided through the County’s land records system (GIS) which identifies approved districts and land in proximity to the districts.



Agricultural Scene

Much of the land within the study area is already developed; however, a 12-acre tract of land is designated as a voluntary agricultural district in the study area. An additional 347 acres in the corridor could qualify for the agricultural district program since the acreage is in the County’s present use tax value program (one of the qualifications for the VAD program). *See Map 10: Natural and Cultural Resources.*

Open space is also preserved through park land dedications. The County’s Unified Development Ordinance (UDO) regulations require open space dedication for all major subdivisions. The contribution is in the form of an onsite park if practical, or trails which allow people to enjoy the outdoors if the tract is within the Carolina



Voluntary Agricultural District



Trail to Marshall fishing Area



Marshall Fishing Area Entrance



Residents Enjoying Fishing Area

Thread Trail route, or a fee in-lieu for the purchase of parkland if onsite land and amenities are deemed impractical.

RECREATIONAL OPPORTUNITIES

A recreational amenity in the corridor is the Marshall Steam Station Fishing Area. It is located off Highway 150 south of the Marshall Steam Station. The fishing area runs along the outlet from the Steam Station and is referred to as the "hot hole" by locals due to the higher water temperatures from the energy plant's water output. Duke Energy has made the area available to the public free of charge, and has added a parking lot, graveled walkways and ample lighting at night.

A future Catawba County Park referred to as Mountain Creek will provide passive recreation opportunities within proximity to the study area. The park space is approximately 600-acres and is located in the back of the cove of the Mountain Creek arm on Lake Norman.

Active recreational opportunities located within proximity of the study area are offered by the Sherrills Ford Optimist Club. The park is located on Mollys Backbone Road.

Other opportunities are available within the study area through businesses offering marinas and campgrounds. Additional recreational opportunities will be explored with the development of the Village and Commercial centers along Hwy. 150.

Trails and outdoor facilities will be encouraged as part of the Key Harbor residential development, which is located outside of the study area off Island Point Road. Other future facilities within proximity will be offered through the Federal Energy Regulatory Commission (FERC) Agreement along Lake Norman. These facilities include the Island Point access area to the north of the study area and Slanting Bridge access area to the south of the Corridor.

CULTURAL / HISTORICAL RESOURCES

Many of the early settlers of Catawba County were Germans and Scotch-Irish who left their native countries for

Chapter 6 Natural / Cultural Resources and Open Space

religious freedom and the hope of better economic conditions. With massive populations initially settling in Pennsylvania and Maryland, many people migrated to Virginia and North Carolina in search of a more rural area. The first census of the United States taken in 1790, indicated that there were 342 families in Catawba County. The population of 10,096 people was 100% rural.

Catawba County's religious history begins with the earliest settlers, who gathered to worship outdoors, or in private homes or barns. Some of the first church buildings were "union churches" in which congregations of two different faiths shared the use of the same building. One of the first church buildings constructed in the County was Rehobeth Methodist Church. The church and associated historic cemetery are located within the study area.

The first known architect in Catawba County was Charles Henry Lester. Lester built several houses in the Hwy. 150 study area, including the T.F. Connor House. The Victorian houses created by Lester represented a radical departure from the vernacular architecture of the time. Previously, most houses were two-story rectangular structures which were at least two rooms long and one room wide. This configuration helped ventilate the building during hot humid summers. The main entrance was usually on the long side of the building so the most impressive façade was seen from the road.

The study area also includes the Terrell Historic District, which is the most intact crossroads community remaining in Catawba County. It is representative of numerous crossroad settlements throughout rural North Carolina. Development of the crossroads began in 1885 with the establishment of a cotton gin by Miles Whitfield Sherrill, and with the opening of a general store by Thomas Franklin Connor, the nephew of Sherrill. By 1893, a post office was established in the Connor store and the crossroads community was named Terrell, after a minister who served Rehobeth Methodist Church. The new community had a population of 25 people.

The Hwy. 150 Corridor Plan includes several sites listed on the National Register of Historic Places as part of the Terrell Historic District. These sites have been recog-



Terrell Historic District



Lake Norman



Rehobeth 1889 Church



Present Day Rehobeth Church



Rehobeth Cemetery



Coleman-Caldwell-Gabriel Farm

nized by state and federal historians as worthy of preservation for their significance in American history, architecture and culture. A brief description of some of those properties is shown below. The Terrell Historic District showing all of the specific property locations are shown on the district map. *See Map 11: Terrell Historic District.*

Rehobeth Methodist Church and Cemetery — Rehobeth Church was the first Methodist Church constructed in North Carolina west of the Catawba River. This first structure was built in 1791 of hewn log.

A frame church was erected in 1889 and later brick veneered in the 1950's. The present church is the result of remodeling and adding on to that original 1889 building. Rehobeth was the only church in the Terrell community and was therefore the main place of worship for the community.

The cemetery adjoining the church contains the graves of the builders and subsequent owners of the houses, stores, mill, gin and farms. The graves of members of the Gabriel, Connor, and Sherrill families are prominent among the stones in the cemetery.

Coleman-Caldwell-Gabriel Farm — The farm is located just north of the Terrell crossroads at the end of a long lane. This is the oldest house in the district and an significant example of Greek Revival architecture. It was built in 1854 by Dr. Coleman and his wife Lucy Hawkins, the daughter of William Hawkins who served as the North Carolina Governor from 1811 to 1814. In 1877 the house was purchased by Franklin Caldwell, a prosperous farmer and Catawba County deputy sheriff. In 1914, the property was sold to County Commissioner R.E. Gabriel. His son R.H. Gabriel operated the general store, post office and cotton gin in Terrell for years as well as being a farmer.

The house is a two-story, frame vernacular farmhouse of Greek Revival influence. Characteristically, these houses were two-story rectangular structures with the long side and main entrance

facing the road. As was also typical for the era, the house has a stone pier foundation, weather-board siding, a gable roof with overhanging boxed eaves. The exterior-end brick chimneys were laid in common bond and with a single shoulder. Between 1915 and 1920 the porch was enlarged, and a two-story ell (building extension at right angle to the main structure) with its central chimney is believed to have been added toward the end of the nineteenth century. A two-story porch lines the south side of the ell, continuing along the west wall of the house. An exterior stair connects the two levels of the porch.

T.F Connor House — Architect Charles Lester originally built the house in 1886 for Thomas Franklin Connor who was the prominent country merchant that built the store/post office building which still stands at Terrell crossroads today. This Queen Anne style house is a large two story structure with a steep pitched gabled roof, and asymmetrical massing. Exterior details alternate between various types of cut shingling, German siding, sawn brackets, and louvered blinds.

Connor Store and Post Office — In 1885 Thomas Franklin Connor, the son of Charles and Mary Jane Sherrill Connor, opened a general store at the crossroads opposite the cotton gin which was operated by his uncle, Miles Whitfield Sherrill. A few years later Connor replaced this store with the larger store which is still in use today.

The current store is a large two-story frame structure with clapboard siding and a gable roof disguised by a false front on the east side front façade. Attached to the north side of the store is a one-story, roofed wing which was originally used as the post office. A shed roofed porch runs the entire length of the front façade. Even with minor remodeling through the years, the building still gives the feeling of an early twentieth century country store.

Sherrill-Gabriel House — This house was built in the early 1880's by Cebring Sherrill as a one-story, three-room frame cottage. In 1906 Mr. Sherrill's son-in-law R.E. Gabriel converted the



T.C. Connor House



Original General Store and Post Office



Present Day General Store



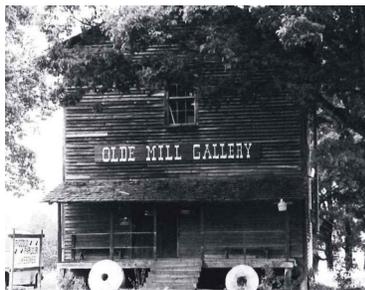
Sherrill-Gabriel House



Walter Gabriel House



James Gillian House



Grist Mill

one-story house into a two-story house. He turned the building around so it faced west. A two-story late-Victorian block was added on the east side, which then became the main entrance for the house.

The house is a three-bay-wide structure with a gable roof and exterior-end brick chimneys. The house is sheathed in weatherboard, except for the gable ends and the walls of the front porch and balcony, which are sheathed in narrow German siding. A one-story, hip-roofed porch with turned posts, balusters, and sawn-work brackets runs nearly the length of the east façade. The center bay of the porch features a pediment. Above the center bay is a second story, balcony with another pediment and details that match the porch.

Walter Gabriel House — The house was built in 1902 by Walter Gabriel, who was the bookkeeper at the Connor Store. It was remodeled in the mid-twentieth century. The house is a one-and-one-half story frame structure, three bays wide, with a cross-gable roof and interior chimneys. The dominant feature of the west façade is the large, dormer-like gable end with its pair of windows. A shed-roofed porch shelters the front entrance.

James Gillian House — Mr. Gillian is believed to have been the first miller at R.E. Gabriel's gristmill in the early twentieth century. The late-Victorian dwelling is a two-story frame structure with weatherboard siding, a multi-gabled roof, and a right front projecting bay. It has a one-story ell attached to the back left side of the structure, and interior chimneys.

Three buildings which were instrumental in Terrell's history have been removed since the formation of the Terrell Historic District. They include the Grist Mill, the Gabriel Cotton Gin, and the Cotton Storage Building.

Grist Mill — The gristmill is believed to have been built during the early twentieth century by R.E. Gabriel, with James Gillian serving as the first miller. It was a large, two story frame structure with stone-pier foundation, weatherboard siding, and metal-covered gable roof. A shed-

Chapter 6 Natural / Cultural Resources and Open Space

roofed porch with wooden posts ran across the front of the mill.

Gabriel Cotton Gin — The cotton gin was established by Miles Sherrill, and later rebuilt by R.E. Gabriel. The gin continued operation until 1960. The structure was a one-story rectangular frame building sheathed in German siding with a pitched gable roof. The east side had an external feeder apparatus. A metal shed was attached to the rear of the building.



Cotton Storage Building

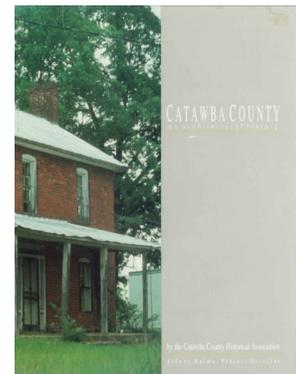
Cotton Storage Building — The cotton storage building, constructed by the Gabriel family was a one-story rectangular frame structure. Resting on a stone pier foundation, the building was sheathed in weatherboard siding.

Persons interested in a more comprehensive inventory are encouraged to consult the Catawba County Historical Association or Sidney Halma's book titled *Catawba County: An Architectural History*.

GUIDING PRINCIPLES

NATURAL RESOURCES, RECREATION AND OPEN SPACE

- NP-1 Assist farmers/property owners desiring to maintain the agricultural or open space use of their property by providing assistance and information on available options.
- NP-2 Preserve ample open space for future generations by encouraging open space, conservation easements, pocket parks, or greenways as part of future developments.
- NP-3 Provide adequate recreational opportunities for all segments of the population.



*Catawba County:
An Architectural History
By Sidney Halma*



Catawba River Greenway—
Morganton, NC

CULTURAL HISTORICAL RESOURCES

- NP-4 Recognize and protect cultural resources.
- NP-5 Preserve properties of local and national historic significance.

PLAN GOALS

NATURAL RESOURCES RECREATION AND OPEN SPACE

- NG-1 Contact farmers in the study area who qualify for the Voluntary Agricultural District program to educate and encourage them to participate.
- NG-2 Evaluate opportunities for developers to include open space in new projects. Search for innovative ideas to create new recreational opportunities.
- NG-3 Pursue grants to secure easements and open spaces, and help develop parks and trails



Terrell Historic District
from Sherrills Ford Looking Toward
Hwy 150

CULTURAL HISTORICAL RESOURCES

- NG-4 Encourage and support the Catawba County Historical Association and the NC State Historical Society in the endeavor to identify historic properties and keep the inventory listing current.
- NG-5 Work with the Department of Transportation, the local Historical Association, State Historical Society and the property owner of the Sherrill-Gabriel House to determine the Hwy. 150 route through Terrell Historic District
- NG-6 Preserve existing historic properties and assist owners with adaptive reuse to ensure sustainability.



**Plan Action Strategies (PASs)
Natural/Cultural Resources**

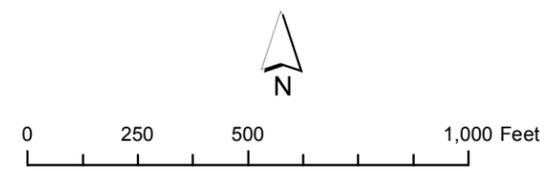
PASs #	CATEGORY	GOAL	LEAD AGENCY	ACTION STEPS	CHAPTER #	PRINCIPAL #	GOAL #	TIMEFRAME	PRIORITY
23	Natural Resources Open Space	Contact farmers in the study area who qualify for the Voluntary Agricultural District program to educate and encourage them to participate.	Planning and Cooperative Extension	Work through the Agricultural Advisory Board to identify farmers located in the study area and contact them personally to educate and encourage them to participate in the Voluntary Agricultural District program.	6	NP-1	NG-1	Ongoing	M
24	Natural Resources Open Space	Evaluate opportunities for developers to include open space in new projects. Search for innovative ideas to create new recreational opportunities.	Planning	Encourage developers to incorporate recreation and open space as an amenity that enhances their development. Discuss design possibilities for individual developments which can take advantage of topography and existing features to achieve the appearance of natural open space which exists in harmony with the built environment.	6	NP-2 NP-3	NG-2	Ongoing	H
25	Natural Resources Recreation	Pursue grants to secure easements and open spaces, and help develop parks and trails.	Planning	Identify grant and matching fund sources for trail easements, parkland, and trail and park development. Apply for grants as funding becomes available.	6	NP-3	NG-3	18 months - 3 Yrs.	M
26	Natural Resources Cultural	Encourage and support the Catawba County Historical Association and the NC State Historical Society in the endeavor to identify historic properties and keep the inventory listing current.	Planning & Historical Association	Identify historic properties in the County. Research documentation at the County Historical Association and State Historic Society to verify all known properties are included on the listing. Encourage the application of adaptive reuse techniques while preserving the historic features of the building.	6	NP-4 NP-5	NG-4	18 Months - 3 Yrs.	M
27	Natural Resources Cultural	Work with the Department of Transportation, the local Historical Association, State Historical Society and the property owner of the Sherrill-Gabriel House to determine the Hwy. 150 route through Terrell Historic District	Planning & Historical Association	Work with property owners at the intersection of Hwy. 150 and Sherrills Ford Road along with NCDOT to identify alternatives that will allow for the road widening section to remain at the current location. This could include a reduced cross-section and/or re-location of exiting buildings.	6	NP-4 NP-5	NG-5	3 - 6 Months	H
28	Natural Resources Cultural	Preserve existing historic properties and assist owners with adaptive reuse to ensure sustainability.	Planning & Historical Association	Identify adaptive reuse opportunities.	6	NP-4 NP-5	NG-6	Ongoing	M

Map 11:
Hwy 150 Corridor Study
Terrell Historic District

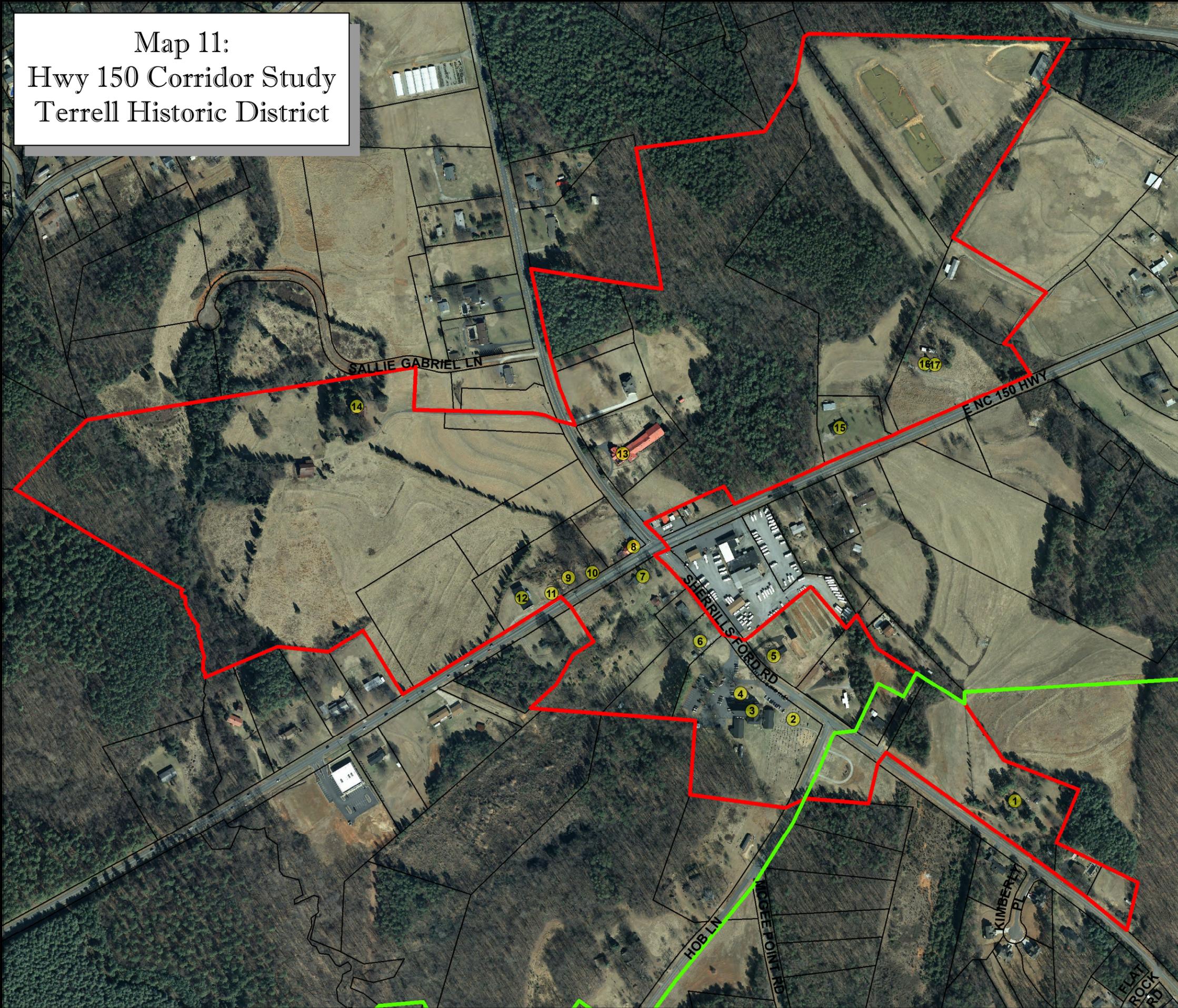
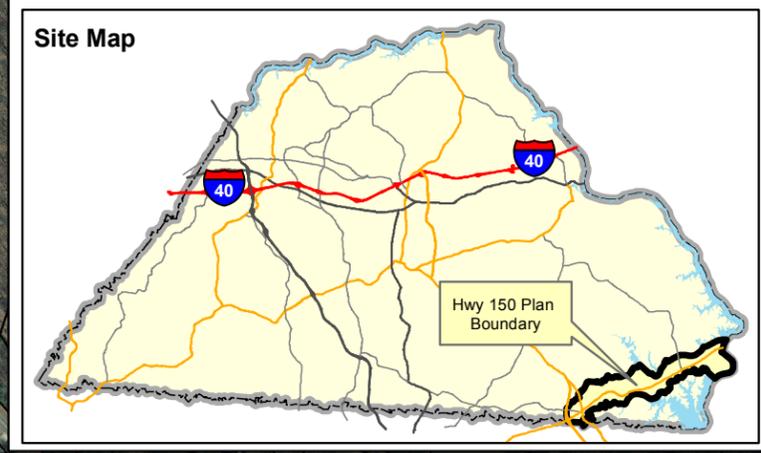


- Historic Sites
- Plan Boundary
- Terrell Historic District
- Parcels

Number	Name
1	James Gillin House
2	Rehobeth Methodist Church Cemetery
3	Rehobeth Methodist Church & Parsonage
4	Sherrill House (Approximate Site)
5	Walter Gabriel House
6	Jesse Stutts House
7	Sherrill-Gabriel House
8	Connor Store & Post Office
9	Gabriel Cotton Gin (Gone)
10	Grist Mill (Gone)
11	Cotton Storage Building (Gone)
12	Warehouse
13	T.F. Connor House
14	Coleman-Caldwell-Gabriel Farm
15	Kermit Lee Howard House
16	Jason Sherrill House
17	Early Sherrill House



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APPOINTMENTS

BARBARA BEATTY (Upcoming) Lake Norman Marine Commission

**Fifth year cycle Additional Catawba County Member
9/30/14**

Commissioner Beatty recommends the appointment of John Gerke for a first term on the Lake Norman Marine Commission. This term will expire September 30, 2019.

LYNN LAIL (Upcoming) Region E Development Corporation

**09/30/14 Jeff Gniadek Eligible for a 4th term
Rodney Miller Eligible for a 5th term**

3-year terms

Commissioner Lail recommends the reappointment of Rodney Miller for a fifth term and the appointment of Philip Moore for a first term to replace Jeff Gniadek who resigned from the Region E Development Corporation. These terms will expire September 30, 2017.

MEMORANDUM

To: Catawba County Board of Commissioners
From: Finance and Personnel Subcommittee
Date: September 8, 2014
Subject: First Amendment to July 2009 Apple Economic Development Agreement for Clarification Purposes and Solar Considerations

Request

The Finance and Personnel Subcommittee recommends the Board of Commissioners approve the First Amendment to the County's Economic Development Agreement with Apple (attached).

Background

The initial agreement with Apple (July 6, 2009) was very specific in outlining projects directly related to the development of a data center in Maiden. Since that time, Apple has developed other properties in Catawba County, particularly for the installation of green energy assets.

The amendment: (1) clarifies specific parcels and improvements subject to the initial agreement; (2) provides a grant for only solar improvements at the Claremont facility, but only if the State stopped providing its grant on solar equipment (no property at the Conover location is subject to the original agreement or this amendment); (3) states the County is desirous and supportive of Apple's development and utilization of green energy sources in order to offset new energy demands created by specific, identified, and announced building and personal property investments and new job creation in Catawba County; and (4) clarifies that investments on those parcels will qualify for Economic Development grants as categorized in this Amendment.

This amendment clarifies that the addition of solar energy equipment will not be recognized for economic development grants by the County unless the current State exemption for grants is repealed, and would only then grant an amount equal to the current State exemption for qualifying Solar Equipment under NCGS 105-275(45), holding the County harmless. The County would receive the same amount of net taxes on the solar properties even if the current State exemption was to be repealed.

Recommendation;

The Finance and Personnel Subcommittee recommends the Board of Commissioners approve the First Amendment to the County's Economic Development Agreement with Apple.

Prepared by: Debra Bechtel, County Attorney
Post Office Box 389, Newton NC 28658

**STATE OF NORTH CAROLINA
COUNTY OF CATAWBA**

**ECONOMIC DEVELOPMENT AGREEMENT
FIRST AMENDMENT**

THIS FIRST AMENDMENT, effective the ____ day of _____, 2014 amends the Economic Development Agreement dated the 6th day of July, 2009 (“Agreement”) between Catawba County (“County”) and Apple Inc. (“Apple”).

WITNESSETH

WHEREAS, Paragraph 5.1 of the Agreement outlined criteria for Apple to receive grants related to certain investments; and

WHEREAS, Apple has a corporate philosophy of developing green energy assets in close proximity to its facilities and the County is desirous and supportive of Apple developing and utilizing green energy sources in order to offset new energy demands created by specific, identified and announced building and personal property investments and new job creation in Catawba County.

NOW THEREFORE, the parties agree to amend the Agreement as follows:

1. [The fourth **WHEREAS** paragraph in the Agreement is hereby deleted and the following substituted in lieu thereof:

WHEREAS, Apple intends to purchase real property within the County more particularly described on Schedule 1, and other real property in the vicinity of such real property (the “Maiden Property”) and that certain 125+/- acre parcel on Kelly Boulevard, Claremont, NC assigned Parcel Identification Number 3761-09-15-6074 (the “Claremont Parcel” and together with the Maiden Property, the “Land”) and to construct on the Maiden Property buildings and other improvements to serve as a data center and a solar energy electric system and provide space for other functions (the “Maiden Improvements”) and to erect or install on the Claremont Parcel a solar electric energy system (the “Claremont Improvements” and together with the Maiden Improvements, the “Improvements”);...

2. The term Improvements as used in the Agreement shall include all buildings and other improvements at any time constructed or installed on the Maiden Property and a solar electric energy system at any time erected or installed on the Claremont Parcel and any repairs or replacements or additions thereto or thereof but shall not include any other buildings, facilities or improvements erected or installed in or on the Claremont Parcel that are unrelated to the solar electric energy system.]

3. Paragraph 5.1 is deleted in its entirety and replaced with the following:

5.1.1. Economic Development Incentive Grants: The County will provide annual grants using the categories herein listed to classify company expenditures.

	Category	Grant Amount	Alternate Grant Amount
I	Real Property & Buildings	50% Grant Category	
II	Personal Property (including energy equipment other than qualifying solar equipment under NCGS 105-275(45))	85% Grant Category	
III(a).	Solar Property (equipment used directly and exclusively for the conversion of solar energy to electricity)	0% Grant Category unless NCGS 105-275(45) repealed	80% Grant Category upon the date NCGS 105-275(45) repeal becomes effective
III(b).	Unimproved Real Estate	0% Grant Category	

Category I Expenditures will receive grants equal to 50% of the additional ad valorem taxes paid to the County during the Initial Term attributable to investments in real property (Land and Improvements), Category II expenditures will receive grants equal to 85% of the additional ad valorem taxes paid to the County during the Initial Term attributable to investments in personal property (the Equipment, including the initial acquisition, repair, replacement and renovation thereof), and Category III(a) expenditures will receive zero grants unless the State of North Carolina repeals NCGS. 105-275(45), in which case qualified solar expenditures under Category III(a) would qualify for annual grants equal to 80% of the additional ad valorem taxes paid to the County in respect of the appraised value of a solar energy electric system. These grants will commence with the taxes payable for the tax values on January 1 of the first year for which Apple elects to receive an annual grant and January 1 of the succeeding nine years except that in the case of Category III(a) Expenditures grants will commence with the ad valorem taxes payable with respect to the first year following the year containing the effective date of the repeal of NCGS 105-275(45) and shall continue for the remainder of the Initial Term and for any Renewal Term. In the case of a partial repeal of the exemption the grant shall be pro-rated to fairly reflect the effect of any such partial repeal.

An annual grant calculated as provided below shall be payable to Apple in each calendar year (CY) during the Initial Term. For purposes of this Agreement, "CY 1" means the calendar year designated in the Commencement Notice and "CY 2" through "CY 10" means the succeeding 9 calendar years. Upon payment of ad valorem taxes by or on behalf of Apple to the County for each of CY 1 through CY 10, and certification by Apple substantially in the form of the certificate attached hereto as Exhibit B, of expenditures made to the date of such certification with proof of taxes paid by Apple, and stating the average wage paid by Apple to Apple's full-time employees at the Facility, the County will, within sixty (60) days; (i) pay to Apple an annual grant in the amount equal to .50 times the total ad valorem tax revenue received by the County attributable to the value of the real property investments (Land and Improvements) made by Apple pursuant to this Agreement in excess of the value for ad valorem tax purposes of the Land and the improvements thereon as of the date that Apple signs the agreement to purchase the portion of the Land and Improvements for which such calculation is made; (ii) an additional economic development incentive payment equal to .85 times the total ad valorem tax revenue received by the County attributable to the value of the personal property improvements (the Equipment, including the initial acquisition, repair, replacement and renovation thereof) made by Apple pursuant to this Agreement; and (iii) should NCGS 105-275(45) be repealed and is no longer in effect for

qualifying solar expenditures, an economic development incentive payment equal to .80 times the total ad valorem tax revenue received by the County attributable to the value of the qualifying solar energy electric system (meaning all equipment used directly and exclusively for the conversion of solar energy to electricity) made by Apple pursuant to this Agreement. This same process will be followed by the County in each of the immediately following 9 years. The County will not pay any grants after the Initial Term unless extended under Paragraph 6, and nothing in this Agreement precludes the County and Apple from entering into a subsequent agreement pertaining to other economic development incentives. The statements in Exhibit B shall conclusively be deemed to be accurate and complete for all purposes, including applicability of the recapture right in Paragraph 8, unless the County objects thereto within 90 days after receipt. The objection will specifically identify the County's concerns. The parties will consult in good faith to try to resolve the County's objections, and upon the County's request Apple will supply verification of the relevant wages, capital expenditures and operating expenses. If the County's objections are not resolved, the parties may pursue their legal and equitable remedies, provided that the annual grants will continue to be made until and unless a non-appealable judicial decision enjoins them.

All other terms and conditions of the Agreement remain in full force and effect.

IN WITNESS WHEREOF, the parties have hereunto set their hands to this Agreement.

CATAWBA COUNTY
A North Carolina Body Politic

By: _____
Katherine W. Barnes, Chair
Catawba County Board of Commissioners

ATTEST:
(Seal)

Barbara E. Morris, Clerk

Apple Inc.
A California Corporation

By: _____
Luca Maestri, Chief Financial Officer

**STATE OF NORTH CAROLINA
COUNTY OF CATAWBA**

I, _____, a Notary Public of said County and State, certify that Barbara E. Morris personally came before me this day and acknowledged that she is County Clerk to Catawba County Board of Commissioners, a body politic, and that by authority duly given and as the act of the public body the foregoing instrument was signed in its name by its Chair, sealed with its official seal, and attested by herself as County Clerk.

Witness my hand and seal this ____ day of _____, 2014.

(Seal)

Notary Public

My Commission Expires: _____

**STATE OF CALIFORNIA
COUNTY OF SANTA CLARA**

On, _____, 2014, before me, _____, personally appeared Luca Maestri, who proved to me on the basis of satisfactory evidence to be the person whose name is subscribed to the within instrument and acknowledged to me that he executed the same in his authorized capacity, and that by his signature on the instrument the entity upon behalf of whom the person acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

Witness my hand and official seal.

(Seal)

Notary Public

My Commission Expires: _____

THIS INSTRUMENT has been preaudited in the manner required by the Local Government Budget and Fiscal Control Act as amended.

Date: _____

Rodney N. Miller, Finance Director

APPROVED AS TO FORM

Date: _____

Debra Bechtel, County Attorney

MEMORANDUM

TO: Catawba County Board of Commissioners

FROM: Finance and Personnel Subcommittee

DATE: September 8, 2014

SUBJECT: Appropriation of \$30,000 in existing fund balance to Bandys Crossroads Volunteer Fire Department.

Request:

The Finance and Personnel Subcommittee recommends to the Board of Commissioners approval of the appropriation of existing fund balance in the amount of \$30,000 for Bandys Crossroads Volunteer Fire Department. Bandys Crossroads Volunteer Fire Department will use these funds to replace a skid unit (pump and tank) on a currently owned brush truck.

Background:

Bandys Crossroads Volunteer Fire Department currently has a 1989 brush truck that has a rusted tank and the rust has damaged the pump. The new skid unit contains both a new tank and new pump and is estimated to cost approximately \$35,000. The cost to replace the entire truck is approximately \$100,000. The department feels the truck is mechanically sound enough to continue operational usage once the skid unit is replaced.

Historically, each department has their own fund balance which is carried from year to year unless the department makes a request to appropriate it. The fund balance is created through tax revenue collections exceeding the projections established by the Budget Department prior to the fiscal year. The Fire Department can utilize ninety percent of the existing fund balance to address major projects such as buildings, building additions, truck replacement and other non-recurring needs such as equipment items. Ten percent of each department's fund balance is held for unforeseen expenditures during the budget year. Bandys Crossroads Volunteer Fire Department has an available fund balance of \$46,225.00.

Recommendation:

The Finance and Personnel Subcommittee recommends to the Board of Commissioners approval of the appropriation of existing fund balance in the amount of \$30,000 for Bandys Crossroads Volunteer Fire Department.

Appropriation of Existing Fund Balance
358-260010-690100 \$30,000
Fund Balance

Expense
358-260010-849010 \$30,000
Fire Protection

Memorandum

To: Catawba County Board of Commissioners
From: Finance and Personnel Subcommittee
Date: September 8, 2014
Subject: Allocation of funds accumulated in Cooperative Extension Liability Accounts

Request

The Finance and Personnel Subcommittee recommends the Board of Commissioners approves a budget revision to allocate Fund Balance in the amount of \$54,633 to Cooperative Extension and Public Health to support 4-H, Agriculture/Local Foods, and Food Safety programming.

Background

Over the last several years, Cooperative Extension accumulated \$54,633 in its liability accounts through program revenue over-collection. These revenues were used to fund departmental initiatives such as ServSafe, Voluntary Agricultural District, Camisole Project, 4-H programming etc. The decision was made to modify the way the accounting for these funds occurs by closing out the liability accounts with the end of Fiscal Year 2013/14. Closing the accounts resulted in the revenues falling to General Fund Fund Balance.

In order for this \$54,633 in funds to be spent in the current year, it needs to be allocated to the operating budget. Cooperative Extension will need \$42,633 to support its programs during Fiscal Year 2014/15, and Public Health's Environmental Health Division will need \$12,000 to support its delivery of the ServSafe training (which was transferred from Cooperative Extension). The funds will be used to train current staff and to administer the program formerly run through Cooperative Extension.

Recommendation

The Finance and Personnel Subcommittee recommends the Board of Commissioners approve a budget revision to increase the FY2014/15 revenue and expense budget by \$54,633.

Supplemental Appropriation:

Revenue

Fund Balance	110-310050-690100	\$42,633
Fund Balance	110-580200-690100	\$12,000

Expense

Miscellaneous	110-310050-849090	\$42,633
Miscellaneous	110-580200-849090	\$12,000

MEMORANDUM

TO: Catawba County Board of Commissioners
FROM: Policy and Public Works Subcommittee
DATE: September 8, 2014
IN RE: Work First County Plan (October 2016- September 2019)

REQUEST:

The Policy and Public Works Subcommittee recommends the Board of Commissioners approve the Work First Plan for submission to the North Carolina Department of Human Resources. The Work First Plan must be submitted to the State prior to September 30, 2014.

BACKGROUND: In 1996, Congress ended the national welfare program known as AFDC (Aid to Families with Dependent Children) and crafted legislation to allow states to implement their own welfare programs. This federal devolution of authority enabled the North Carolina General Assembly to go even further with welfare reform. The legislature took the next step; allowing counties to compete for Electing County status – in essence offering a limited number of counties the opportunity to have greater control over local welfare policies, as well as greater control over available funding.

On July 21, 2014, the Catawba County Board of Commissioners voted to pursue “Electing County” status and appointed a committee to assist in the development of the county’s Work First Plan.

The plan was available for public review and comments from August 11, 2014 to August 15, 2014. Copies of the plan were placed at:

- Department of Social Services
- Social Services Web Page

The philosophy of the Work First Plan incorporates quality values and organizational standards that reflect respect for the worth and dignity of each and every citizen. Catawba County’s plan takes personal responsibility to the next level, as well as modeling the plan after the ‘real world of work.’ The plan is to have long-term successful family and child well-being outcomes for the entire Work First population.

Highlights of the plan-

1. Benefit Diversion Requirements:

Catawba County will follow established and implemented by the State regarding benefit diversion with the following exceptions:

Applicant must cooperate with Child Support, apply or be receiving Food Assistance, and the applicant must register with Employment Security Commission if not already employed or job being held for the applicant and if

monetarily eligible for Unemployment Benefits (UIB) must apply for the UIB prior to approval of the Benefit Diversion application.

2. Cooperation with Child Support is an eligibility requirement:

Applicant must cooperate with child support within 12 calendar days of applying for WFFA. If the applicant fails or refuses to do so without good cause, deny the application for WFFA and notify the Medicaid worker (applicants must apply for Medicaid before applying for WFFA).

3. Evaluate for or be receiving Food Assistance:

Applicant must be receiving Food Assistance or be evaluated for Food Assistance within 12 calendar days of applying for WFFA. If the applicant fails or refuses to do so without good cause, deny the application for WFFA and notify the Medicaid worker (applicants must apply for Medicaid before applying for WFFA).

4. Vocational Rehabilitation:

All Work First applicants and recipients referred to Vocational Rehabilitation must complete the application and comply with all recommendations. Failure or refusal to comply without good cause will result in the case being denied or terminated. Future eligibility is contingent upon completing the application and cooperating with Vocational Rehabilitation.

5. Substance Abuse/Mental Health Initiative for all cases:

Caretakers in the child only cases will be required to comply with the policy outlined in Section 104B of the Work First manual – Substance Abuse/Mental Health Initiative as a condition of eligibility. This is in effort to ensure child wellbeing.

6. Job Quit:

Job quit (treated the same as non-compliance with the MRAs) will be applied to individuals that have been informed of the Job Quit Policy at any time in their history of receiving Work First and who voluntarily quit a job, refuse to accept a bona fide job offer, request a reduction in hours, all without good cause or are terminated with cause. The following statement from the MRA-B will be added to MRA-A “I will accept and keep any reasonable job offered to me. I will not quit a job, refuse an offer of employment or fail to follow up on job referrals without good cause.”

“Electing County” status continues to be preferred for Catawba County, because it allows greater flexibility in program administration and the possibility to be financially advantageous – although it would certainly be less advantageous than in past years.

On August 19, 2014, Catawba County Social Services Board approved the Work First Electing Plan.

RECOMMENDATION: The Policy and Public Works Subcommittee recommends the Board of Commissioners approve the Work First Plan for submission to the North Carolina Department of Human Resources. The Work First Plan must be submitted to the State prior to September 30, 2014.

CATAWBA COUNTY WORK FIRST PLAN 2016-2019



Submitted: September 2014
John Eller, Director
Catawba County Social Services
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Table of Contents

I.	Conditions within the County	3
II.	Planning Process	5
III.	Goals and Performance Measures	8
IV.	Plans to Achieve the Outcomes and Goals	10
V.	Administration	12
VI.	Emergency Assistance	16
VII.	Services to Low Income Families (under 200% of federal poverty level)	18
VIII.	Services to Non-Custodial Parents (optional)	19
IX.	Exemption from the Work Requirements	20
X.	Innovative County Strategies	21
XI.	Special Issues	22
XII.	Eligibility Criteria	23
XIII.	Appeals Process	25
XIV.	Review Prior to Expiration of Time Limits	26
XV.	Funding Requirements	27
XVI.	Certification	28

I. Condition within the County

- Only 257 of Catawba County's 154,810 citizens receive Work First. That is less than .002% of the population (<http://quickfacts.census.gov>).
- 142 families were receiving Work First in July. Of these, 122 included no adult in the assistance payment (Work First Case Profile Summary Report July 1, 2014).
- 15 individuals are Work Eligible which means they must comply with the Employment component of the program (Monthly Staffing Report July 1, 2014)
- The racial heritage of families receiving Work First is 45.77% Caucasian, 18.85% Other/Hispanic, 2.69% Asian, and 32.69% African-American (Work First Case Profile Summary July 1, 2014).
- Work First recipients face many barriers to employment, which include: medical problems that preclude or limit their employment and serious mental or psychological problems.
- 47% of the children in Catawba County were enrolled in either Medicaid or NC Health Choice as of July 2014, 16776 children (0-20 years old).
- Transportation is another major barrier. Even if the family has a car, the car is often in poor repair.
- 5% of all households in Catawba County have no vehicle available for personal use (2012 Catawba County Child Data Snapshot).
- In 2009, Catawba County had a teen pregnancy rate of 51.4 per 1,000 (15-19 years old) (2012 Catawba County Child Data Snapshot).
- In North Carolina, a minimum wage earner (earning \$7.25 per hour) can afford a monthly rent of no more than \$377. If the family only receives \$674 per month in Social Security benefits, they can afford a monthly rent of no more than \$202, while the Fair Market Rate for a one bedroom unit is \$606. (NCHousing.org)
- 42% of Catawba County renters are unable to afford a 2 bedroom apartment compared to the state at 44% (2012 Catawba County Child Data Snapshot).
- Approximately 62.8% of the children in the Work First caseload have a valid child support order. The average support obligation is \$125.68 in Catawba County as compared to the state average for TANF of \$105.69. The average collection rate of TANF is 68.4% as compared to the state average rate of 71.73%.

Catawba County had an unemployment rate of 7.2% in May 2014 (most recent statistics) while the State's rate was 6.4%. There were 5,244 unemployed citizens in May (www.ncesc.com). The Food Assistance caseload has remained fairly stable over the last year (2013-2014).

Recent statistics reveal that the top three employers in the county are education and health services – Catawba County Schools System, Catawba Memorial Hospital and Frye Regional Medical Center ([Catawba](#) County Economic Development). Therefore the majority of the available jobs are in the service industries which involves night and

week end work, as well as rotating shifts and days. This type of scheduling makes childcare and transportation very difficult to coordinate. Education and technical training continue to be high priorities for Catawba County. Catawba Valley Community College offers short term training and college transfer curriculum. Catawba County is also home to Lenoir Rhyne University, a four year liberal arts school. Catawba County possesses a diverse economy with a extensive retail, service, as well as manufacturing jobs. Less than 16.7% of the population does not have a high school or higher education. (Catawba County Economic Development Corporation web page).

Two centers are currently offering second shift care until 9:30 p.m. with one center staying open until 7:00 p.m. Three offer second shift care on an 'as needed basis.' This means they are keeping a list and, when they have enough children, they open up a room. No center offers third shift care. Eight licensed homes are providing second shift care and five licensed homes are providing third shift care. There are two Family Child Care Homes that offer weekend care. This care is sometimes sporadic which makes it difficult for families to count on. Helping families to locate safe and affordable childcare to meet the needs of irregular work schedules is imperative to continued success of the program. (The Children's Resource Center)

Public transportation is not available throughout the county. No public transportation is available outside of the extended workday. Buses do not run on Sundays. Many areas of the county are miles from the nearest employer and/or child care provider. For these families, the lack of transportation is a major barrier to self-sufficiency.

Mission Statement

To enable Work First recipients and applicants to become and remain self-sufficient by linking them with resources and skills, and to allow them to take responsibility for themselves and their families.

Vision Statement

All Catawba County families will demonstrate personal responsibility and will have the resources needed to meet their basic needs – food, clothing, shelter, and medical care.

II. Planning Process

A. Planning Committee

The State of North Carolina submits a State TANF Plan to the federal Department of Health and Human Services. The State Plan describes North Carolina's TANF Program, called Work First. The State Plan is an aggregate of the standard Work First Program and the various Electing County Plans.

The Social Services system in North Carolina is county-administered and state-supervised. The State Division of Social Services establishes the standard Work First Program according to guidelines contained in federal regulations and state law, allowing counties maximum local flexibility.

Electing counties develop a plan that describes their plans for administering the program in response to local needs and situations.

This plan will be for October 1, 2016 through September 30, 2019. The Board of County Commissioners approves county plans.

The planning process is an opportunity to take full advantage of local flexibility built into the Work First Program. It is the time to strengthen local partnerships and tap into local creativity to move low-income families into self-sufficiency.

On July 21, 2014, the Catawba County Board of County Commissioners voted for Catawba County to continue being an Electing County.

The Board of County Commissioners is required to appoint a committee to oversee the planning effort. The members of the Committee and the groups they represent are:

Lynn Lail	Board of Social Services / Board of County Commissioners
Michael Smith	LME - Partners Behavioral Health Management
Dana Lynch	Public Health
Angela Simmons	Local School System
Michael Pons	Business Community
Veronica Grantham	Employment Security Commission Manager
Barbara Rush	Greater Hickory Cooperative Christian Ministry
Robert Silber	Eastern Catawba Cooperative Christian Ministry
Captain Harris	Salvation Army
Henry Steele	Vocational Rehabilitation Manager
Malle Vue	Goodwill Manager
Cassie Nantz	Child Care Service Provider
Joyce Watson	HRD Director
Bob Skinner	Qualified Professional in Substance Abuse Professional (QPSA)
Julie Walker	Cognitive Connection Corporation
Lori Williams	Prevention Unit Supervisor
Kristen Sigmon	Child Support Unit Program Manager

Bruce McCoury	Transportation Supervisor
Julie Raper	Food Assistance Program Manager
Karen Mace	Medicaid Program Manager
Karen Heffner	Work First / Day Care Program Manager
Susan Parrish	Program Administrator - Economic Services

B. Public Comment

The plan was made available for public review from August 11, 2014 through August 15, 2014. An article in the local newspaper informed citizens that copies of the plan were available to review at Social Services and on the Social Services web page. Accepting the input from local citizens and with the recommendation of the Planning Committee, the plan was formally approved by the Catawba County Board of Commissioners.

C. Planning Process

On August 6, 2014, the Planning Committee meeting was held. At this meeting, local Social Services staff gave the committee members an overview of the current Work First Program. Demographic information on the current Work First population was shared with the group. A time line was developed for the project.

During the month of July and August, Work First participant and applicants were surveyed. The survey asked:

- What barriers are keeping you from becoming employed?
- What do you need in order to become employed?
- What services do you currently use from Social Services?
- What would you change about the Work First Program?
- What benefits/services of the Work First Program have helped you?
- If employed, what has helped you in keeping your job?
- What services do the children in the Work First grant need to help them be the best they can be?
- Any other comments

Catawba County's demonstrated record of commitment to children and families, collaborative strategic planning, risk taking and successful implementation of innovations makes this community a natural choice to continue being an Electing County. The successful track record includes efforts such as Catawba County TANF Housing Initiative, Work First Demonstration Grant, Work and Ride, Career Center, and Job Boost. Catawba County has used the many lessons learned from previous efforts to design this project for families in need.

Welfare reform continues to be a work in progress. The Board of County Commissioners and Social Services will continue to monitor and evaluate the impact of the Work First Program on children and families in Catawba County and to recommend adjustments and refinements to the collaborative effort as needed. Members of the committee have pledged their support of the proposal and its implementation.

Catawba County will follow the State Work First Non-Discrimination Policy and Grievance Procedures found in Section 002. The flyer DID YOU KNOW? (DSS 5333) is posted and given to customers as requested. Catawba County Social Services will inform all LEP (Limited English Proficiency) persons of the right to receive free interpreter services and encourage them to identify themselves as persons needing language assistance (Posted signs, statements in pamphlets, on the website, etc.) The language of the LEP person will be noted in his/her record so that all staff can identify the language assistance needs of the client. Bilingual staff and/or the Contract Telephone Interpreting Service will be used for effective communication between the Agency Staff and the LEP persons.

III. Goals and Performance Measures

The Goal of the Catawba County Work First Program is to move Work First applicants and recipients to self-sufficiency by either empowering them to secure and maintain employment or by securing disability benefits.

A. Statewide Work First Goals

Catawba County will adopt the goals established by the state. Those goals are:

1. Meeting Federal Work Participation Rates for All Families. Active participants in employment services and activities will lead to full time employment. Counties must ensure that at least 50% of all Work Eligible individuals, as defined by Federal Rule, complete the required number of hours of federally countable activities.
2. Meeting Federal Work Participation Rates for Two-Parent Families. Active participation in employment services and activities will lead to full time employment. Counties must ensure that at least 90% of all two-parent families with Work Eligible individuals, as defined by Federal Rule, complete the required number of hours of federally countable work activities.

B. County Performance Measures

1. Employment: Self sufficiency will be realized primarily through the employment of Work First citizens. Catawba County will ensure that an average of 7 participants per fiscal year will become employed and will use the statistics from the staff's monthly spreadsheet.
2. Meeting Federal Participation Rates: Active participation in federal countable work activities will lead to full time employment.

Date	All Family	Two Parent	Date	All Family	Two Parent
July 13	64.71%	N/A	Jan 14	46.67%	N/A
Aug 13	60.00%	N/A	Feb 14	70.00%	N/A
Sept 13	57.89%	N/A	Mar 14	58.33%	N/A
Oct 13	Federal shutdown	N/A	April 14	66.67%	N/A
Nov 13	61.54%	N/A	May 14	60.00%	N/A
Dec 13	66.67%	100%	June 14	50.00%	N/A

3. Providing Employment Services: Active participation in intensive employment services for all families is necessary in order to meet the participation rate and to ensure families are served adequately before the end of five years. One measure of success in Work First is the percentage of families who are subject to work requirements that counties are assisting with job preparation and job placement. Catawba County will provide 100% of the Able Bodied adults with employment services.
4. Staying Off Welfare: Efforts to reduce welfare rolls, help adults find jobs, and increase self-sufficiency are undermined when families return to welfare. Families leaving Work First because of a job are tracked to determine if they return to cash assistance. Case Manager will provide case management,

- counseling and problem solving. Case Manager will evaluate former Work First participants for 200% of poverty services. Referrals to appropriate community resources will be made.
5. Job Retention: Families who leave Work First for employment and continue to be employed 6 to 12 months after leaving the program show evidence of keeping their income and increased job stability, which impacts a family's well-being. Families that remain employed for four months will receive the County's retention bonus. The State does not track and/or provide this data to the counties; therefore it will be a manual tracking of how many recipients receive the county's retention bonus.
 6. Benefit Diversion: The most successful outcome for an applicant for public assistance is to avoid the need to become a recipient. This is also recognized in the federal law, which specifies diversion from public assistance as a desired outcome. Catawba County will offer Benefit Diversion when appropriate and other supportive services. Benefit Diversion will be assessed if appropriate prior to placement on public assistance.

IV. Plans to Achieve the Outcomes and Goals

1. Employment: Work is the focus of the Work First Program. On the day of application, the case manager begins laying the foundation and ground rules for this program. The citizen is informed that Work First Cash Assistance is considered a short-term assistance and full time employment is the goal of the program.
 - a. Activities: Job Development and Placement provided by the Division of Workforce Solutions, Career Center, CVCC's Human Resources Development, English as a Second Language, Graduate Equivalency Degree, Adult Basic Education, Short term skills training, CRC (Career Readiness Certificate) and Community Work Experience opportunities.
 - b. Supportive Services: Counseling, case management, daycare, transportation, and participation expenses (mileage reimbursement, uniforms, tuition and books, etc.) child support and food assistance.
2. Meeting Federal Participation Rate: The rate will be met through a combination of efforts.
 - a. Activities: Employment services are offered to all able-bodied adults. Catawba County case managers will provide Work First participants with the full array of services, including developing appropriate Mutual Responsibility Agreements and closely monitoring progress as the citizen moves towards self-sufficiency. Case Managers will place all mandatory participants in appropriate countable Work First activities; such as Employment, Vocational Education Training, Work Experience, Job Search/Job Readiness, etc. All cases will be staffed with the supervisor at a minimum of once per month. Case managers will also make referrals to community resources. The case managers will assure that all applicable cases are opened in NC FAST once EPIS is no longer available each month and supervisor will monitor the employment services case management report and follow up if needed. Work First checks will not be released if the participant is out of compliance with their Mutual Responsibility Agreement unless there is good cause and all cases out of compliance will be staffed by the unit to determine if good cause exists.
 - b. Supportive Services: Counseling, case management, daycare, transportation, participation expenses (mileage reimbursement, uniforms, tuition and books, etc.) are provided to ensure that participants are able to complete the required number of hours in their assigned component(s).
3. Providing Employment Services: Citizens seeking employment will find a full array of services available to assist them.
 - a. Activities: Employment services are provided to all able-bodied adults. Case managers will assess the participant's job readiness and if appropriate place the participant in the community college's Employability Class before beginning the job search component. If appropriate, the participant will be required to obtain their CRC (Career Readiness Certificate). The case manager and participant will partner

- with Division of Workforce Solutions, Career Center,, WIA (Workforce Investment Act), Vocational Rehabilitation, Employers and other appropriate programs to assist in the participant becoming employed.
- b. Supportive Services: Counseling, case management, daycare, transportation, and participation expenses (mileage reimbursement, uniforms, tuition and books, etc.) child support and food assistance.
4. Staying off Welfare: Catawba County is using a multi-faceted approach to keep citizens on the job and off of welfare.
 - a. Activities: Case management services will be provided after the Work First participant becomes employed. Case managers will evaluate the former Work First participant for 200% of Poverty Services, Emergency Assistance, Retention service and bonus, and Economic Crisis Services in the county. Referrals to appropriate community resources will be made.
 - b. Supportive Services: Counseling, case management, daycare, transportation, Job Bonus, Transitional Medicaid, retention bonus, child support, food assistance, and community referrals.
 5. Job Retention: Families who leave Work First for employment and continue to be employed six to twelve months after leaving the program show evidence of keeping their income and increases job stability, which impacts a family's well-being.
 - a. Activities: Case manager will provide case management, counseling and problem-solving. Case manager will refer former participants to appropriate agencies, such as Employment Security Commission, JobLink Career Center, and Employers. The case manager will evaluate former Work First recipients for 200% of Poverty Services, Department of Transportation Funds, Emergency Assistance, and Retention Services.
 - b. Supportive Services: Counseling, case management, daycare, transportation, Job Bonus, Transitional Medicaid, retention bonus, child support, food assistance, and community referrals.
 6. Benefit Diversion: The culture of Catawba County Social Services has changed. The focus is on employment, not processing entitlements. For many citizens in a short-term crisis, Benefit Diversion is an obvious solution.
 - a. Activities: The case manager will assess each applicant's situation to determine if Benefit Diversion is appropriate and if so, will offer it to them. The case manager will consider previous public assistance and employment histories. The applicant's ability to find employment within a brief period of time, maintain current employment, or obtain sufficient income from other sources will also be considered.
 - b. Supportive Services: Counseling, case management, day care if funding is available, child support, and food assistance.

V. Administration

A. Authority

The Catawba County Board of County Commissioners retains full authority for the Work First Program.

B. Organization

Catawba County Social Services is responsible for administration of the Work First Program. From the moment the citizen makes first contact with the agency, he/she is informed that the Work First Program is a temporary assistance program and the goal for each citizen is full time employment and self-sufficiency. The case managers in this unit are blended doing both eligibility and employment functions. The Case Managers serve on Intake approximately twice a week; therefore, they take and process the applications and maintain the on- going cases. With implementation of NC FAST the Work First case managers are becoming Universal Workers. The Work First case manager carries the Medicaid and FNS (Food and Nutrition Services) for the families receiving Work First.

D. Child Care

When the availability of child care funding is less than the amount needed to serve all eligible children, Catawba County Social Services has the option to give some children priority for services. The names of all children who cannot be served will be maintained on a waiting list. When funds become available to reduce the waiting list, children will be removed in the order of priority. Within each priority group, families will be served on a first come, first serve basis.

Families in the following categories will be exempt from the waiting list:

- Priority #1 – Child Protective Services
- Priority #2 – Teen Parents enrolled the local school system
- Priority #3 – Foster Parents
 - Full or part time employed
 - Full or part time post-secondary education
- Priority #4 – Work First parents who are participating in mandatory activities (including Post-Secondary Education) to fulfill their Work First Employment and Training requirements and are in full compliance with their Mutual Responsibility Agreement.

Families will be served in the following order:

- Full time employment or full time training leading to employment
- Education
 - Full time post secondary
 - Full time vocational, skills training, GED, ABE, ESL
- Child Welfare Services
- Part time employment
- Part time education

- Development needs

Quick Care, which began in January 1998, assists Work First families with an immediate need for childcare. The Work First families are seen immediately upon becoming employed and are given a voucher based on their declaration of income if verification cannot be obtained before the family is scheduled to begin work. The family is given ten days to provide verification of income. This enables the Work First family to secure childcare immediately, which allows the family to accept the employment offer.

E. Transportation

Approximately \$12,000 from the Work First Block Grant will be allocated for transportation services for state fiscal year 2014-2015. Strategies included the utilization of:

- Public Transportation: Western Piedmont Regional Transit Authority – Greenway Public Transportation
- Mileage reimbursement – Work First families are reimbursed 21 cents per mile in order to participate in their component with a cap of \$100.00 per month
- Transportation for Work First recipients during their retention period – A maximum of four months transportation assistance is provided for all Work First customers that are working (20 hours or more per week), no longer receiving Work First cash assistance and, as long as their income is below the 200% of poverty level.

F. Substance Abuse and other Services

It can be anticipated that many of the Work First participants with substance abuse, mental health issues, and/or disabilities will have difficulty meeting the goal of the Work First program.

Work First and The Cognitive Connection have committed to work together in order to craft a plan that addresses local community needs. As part of the Work First – Substance Abuse Initiative, The Cognitive Connection provides one FTE Qualified Professional Substance Abuse (QPSA) stationed on site at Social Services to conduct initial substance abuse screenings and assessments for the Work First population. The QPSA screens and makes appropriate referrals of other mental health issues. Substance abuse services provided by this program include, but are not limited to the following: Screenings, Assessments, Treatment Planning, Referral to Treatment Services and Case Management services. (MOA Attached)

Substance Abuse Screening: All adults applying for the Work First program will be given an initial substance abuse screening by the QPSA or Work First case manager – the Audit/Dast. If the results of this screening detect a possible substance issue, the QPSA or Licensed Professional will conduct a complete assessment.

Substance Abuse Assessments: The QPSA or Licensed Professional will conduct a substance abuse assessment, which will include an in-depth clinical interview and the use of a statewide-approved assessment tool..

Treatment Planning and Referral to Treatment Services: When the QPSA identifies a Work First participant as having a substance abuse issue, the QPSA begins the treatment planning process with the identified person. The QPSA and customer will develop a Mutual Responsibility Agreement addressing these issues and appropriate referrals are made for treatment.

Community Support Services: The QPSA stationed at Social Services provides ongoing care coordination, including tracking of progress.

Vocational Rehabilitation : When a participant presents with a disability the Work First case manager will make a referral to Vocational Rehabilitation. All Work First applicants and recipients referred to Vocational Rehabilitation must complete the VR application and comply with all of their recommendations. Work First and Vocational Rehabilitation agree to closely coordinate activities in order to assure a coordinated plan and no duplication of services. (MOA attached)

G. Family Violence Option

Violence in the family may be a substantial barrier to self-sufficiency for many families. Catawba County, recognizing the impact that violence can have on families, has a Memorandum of Agreement with Family Guidance in order to determine services needed and provide appropriate services to participants , as well as to determine the extent to which the violence is an impediment to self-sufficiency. Family Guidance will provide the following services:

- Individualized assessments for each participant referred by the Work First case manager. Based on the assessment the participant may receive ongoing counseling, psychological testing, and/or supportive services.
- Case consultation with the Work First case manager.

Catawba County Social Services – Work First and Family Guidance agrees to closely coordinate activities in order to assure a coordinated plan and no duplication of services.

If a participant is unable to participate in work activities or comply with other Work First requirements at the time of assessment, the participant may request a waiver. The Work First case manager will use the assessment report from Family Guidance in conjunction with other information concerning the case, to determine if a waiver should be granted and for how long.

H. Maintenance of Effort (MOE)

The following activities, staff and services will be funded using Maintenance of Effort (MOE) funds:

- Work First Staff
- TANF Fraud Investigative Staff
- Work First Participant Expenses
- Work First Child/Adult Care
- Work First Transportation Expenses
- Retention Services
- Enrichment Services
- Group Support
- Contract – Legal Aid
- Work First Cash – Emergency Assistance
- Others as needed

I. Child Welfare Services

Seventy-five (75%) of the Work First Block Grant will be devoted to Child Welfare Services for fiscal year.

VI. Emergency Assistance

Catawba County will continue to address the emergency needs of families with a combination of resources. Three non-profit assistance Agencies have a long history of serving the needs of families in crisis: the Salvation Army, the Greater Hickory Cooperative Christian Ministry (Hickory Area) and the Eastern Catawba Cooperative Christian Ministry (serving the Eastern end of the county). A number of smaller programs and Agencies also serve families in need: including the Red Cross, the Christian Community Outreach Ministries and Family Care Center. Many area churches maintain crisis funds for families in need, in addition to supporting the efforts of the above-referenced Faith-based ministries.

Catawba County Social Services will continue to appropriate a portion of its TANF allocation to the Emergency Assistance Program.

To be eligible for Emergency Assistance, the family must:

- 1) Have a child that meets the Work First Family Assistance guidelines in the home who is related to the specified relative
or be preparing for the return of a child (i.e. child being returned to home from foster care) within the next 60 days
or be the legal custodian or guardian for a minor child in their care (Per Work First Manual)
- 2) Be a US citizen or an eligible alien.
- 3) Be in an emergency situation caused by *circumstances beyond the control of the family* (loss or significant decrease in income, fire, unusual medical expenses that have left the family unable to meet their normal living expenses, etc.)
- 4) Have total countable reserve equal to or below \$3000. Liquid assets are limited to \$300. Vehicles are not counted in reserve. Liquid assets are cash on hand, current savings account balance, checking account balance (except what is needed to pay bills), stocks, bonds, mutual fund shares, savings certificates and revocable trust funds.
- 5) Have a monthly total countable income equal to or below 200% of the federal poverty level. Countable income is the same as for Work First Family Assistance. Use a base period of the month prior to the month of application. Convert income to a monthly amount (by using conversion factors of 4.3, 2.15). Add together the countable earned and unearned income. Compare to the income chart to determine if income eligible.
- 6) Cannot have received EA within the past twelve months.
- 7) Must apply for EA in the county in which they live.
- 8) Is eligible for a 30-day period, once approved. Payments may not exceed \$300 in a 30-day period. Benefits may not be provided under EA more than one time in a twelve-month period.

- 9) Must cooperate with Child Support, if there is not already an open child support case and if there is no cost, before the EA application can be approved (within 5 days).
- 10) Must be evaluated for Food and Nutrition Services, if not already receiving before the EA application can be approved (within 5 days).

The Agency must:

- 1) Make a decision to approve or deny the EA application within five workdays from the date of application.

Evaluation of Emergencies

- 1) EA cannot be used to improve the family's standard of living.
- 2) Explore whether any member of the family will have income that can be used to meet the emergency. (Will they get paid again before the power bill is due?)
- 3) Explore with them the steps they have taken to alleviate the emergency.
- 4) Evaluate whether or not the family has experienced a sudden change that has led to a decrease in income or created an extra expense
- 5) Evaluate to determine if they caused their own emergency. Do they have a history of being in a crisis situation? If so, explore other options.
- 6) Determine if EA will prevent recurrence of the emergency. Will they be able to maintain on an ongoing basis if we alleviate this emergency or will they have the same problem next month?
- 7) If the family has been penalized for failure to comply with WFFA program requirements, and the emergency could have been prevented had they complied, deny the EA application.
- 8) Heating and cooling crisis: CIP/ LIEAP/ Share the Warmth monies must be used first. If there are no Energy Program Funds, EA monies can be used to alleviate the crisis.
- 9) TANF funded assistance may not be provided for any medical care, regardless of whether the family members are covered by Medicaid. If assistance is provided for medical care it must be with MOE (Maintenance of Effort) funds and only for services that are not covered by Medicaid.
- 10) TANF funds will not be used to assist with rent if the applicant is already receiving other federal, state, local subsidized rent.

VII. Services to Low Income Families (under 200% of Poverty)

Catawba County will provide services to families with income at or below 200% of poverty when: the family is a former Work First family, the adult is working, the custodial parent is cooperating with child support, the adult is receiving or has applied for Food Assistance and Family Medicaid, and the services provided will assist the adult in maintaining employment which will keep the family from reentering the traditional Work First Program.

The following services may be provided:

- Short term housing;
- Child and Family Enrichment Activities;
- Transportation;
- Child Care;
- Parenting training/services;
- Work-related expenses; and
- Case management.
- Other appropriate services that can be funded by TANF and MOE that would prevent the family from losing employment and returning to Work First.

Eligibility for services will be determined per state policy:

- Family's total gross monthly income is at or below 200% of the federal poverty level (accept family's statement, unless it is questionable);
- Same definition of a family as used for current Work First participants;
- At least one child in the family must be under 18 and meet the same kinship and living with rules as current Work First families; and
- Complete and maintain the eligibility worksheet.

All Work First citizens who are subject to the work requirements will be served before offering or providing the above listed services to "families with children at or below the 200% federal poverty level." Catawba County will ensure that all Work First citizens are served first through the organization of the Work First unit. In Catawba County, it is the responsibility of the Work First Case Manager to implement the entire Work First Program -- cash assistance and employment. Therefore, from the moment the applicant presents her/himself for any of the Work First services, the focus is on helping the family meet their financial needs through employment and child support. On the day of application, the case manager begins to lay the foundation and ground rules for the program.

VIII. Services to Non-Custodial Parents (optional)

Catawba County will not offer services to non-custodial parents.

IX. Exemption from the Work Requirements

Catawba County will follow the State Policy regarding exemptions from the Work Requirement.

X. Innovative County Strategies

Catawba County has historically demonstrated creative and highly effective collaborative efforts combining the skills and resources of multiple agencies and programs. The same is true of this effort. Several successful initiatives are currently in place to protect children and strengthen families. These projects include:

Legal Services for Child Only Cases: Catawba County has a contract with Legal Aid of North Carolina to provide legal services to ‘child only’ Work First Family Assistance citizens and, if applicable and appropriate, to ‘regular’ Work First Family Assistance citizens to increase the family stability for the children. The legal services provided included:

- Counsel and Advice
- Preparation of documents such as education affidavits, health care consent forms
- Representation in custody, guardianship, and adoption proceedings

Catawba County Career Center: Catawba County’s Career Center is located at the Division of Workforce Solutions - NC Works office. The center’s partners include:

- Social Services – Work First
- Catawba Valley Community College
- Division of Workforce Solutions
- Vocational Rehabilitation
- Goodwill Industries
- Cognitive Connection
- Senior Community Service Employment Program
-

The services offered at the center include:

- Career Testing/Assessment
- Mock Interviews
- Job Referral and Listings
- Labor Market Information
- Referrals for Supporting Services
- Resume Preparation

Retention Services: Catawba County provides a one-time lump sum Employment Retention Bonus of \$400 to Work First participants whose Work First check terminates due to earned income and who remain employed:

- With the same employer (unless the change is an improvement), and
- Employed full time (30+ hours per week) for four consecutive months following termination of their Work First Cash benefit, and
- Income eligible based on the 200% level of poverty worksheet

XI. Special Issues

Catawba County had an unemployment rate of 7.2% in May 2014 (most recent statistics) while the State's rate was 6.4%. There were 5,244 unemployed citizens in May (www.ncesc.com). The Food Assistance caseload has remained fairly stable over the last year (2013-2014).

Another concern is the number of children in the Child only/Caretaker caseload where the child is a US citizen, but the parent in the home is undocumented. Currently, there are 10 cases where the US born child of an undocumented parent is receiving benefits. These cases are not subject to the employment component, however are subject to the 60 month state time clock for the family once the Work First case is in NC FAST.

XII. Eligibility

Catawba County will follow criteria established and implemented by the State regarding for the following:

- Age limits for children
- Payment levels
- Benefit Calculation
- Countable Income
- Resources requirement (limit and countable items)
- Extensions
- Time Limits for cases that include the Parent in the grant
- Work First Benefits (non compliance with MRAs with one exception listed below)
- Child Support Sanctions
- Reviews- will completed per State Manual

Applicants must apply for Medicaid or be receiving Medicaid before applying for Work First.

Catawba County proposes changes to the following policies. These changes will be implemented once the State and Catawba County's plan has been approved.

1. Benefit Diversion Requirements:

Catawba County will follow the State regarding benefit diversion with the following exceptions:

Applicant must cooperate with Child Support, apply or be receiving Food Assistance, and the applicant must register with Division of Work Force Solutions - NC Works if not already employed or job being held for the applicant and if monetarily eligible for Unemployment Benefits (UIB) must apply for the UIB prior to approval of the Benefit Diversion application.

2. Cooperation with Child Support is an eligibility requirement:

Applicant must cooperate with child support within 12 calendar days of applying for WFFA. If the applicant fails or refuses to do so without good cause, deny the application for WFFA and notify the Medicaid worker (applicants must apply for Medicaid before applying for WFFA).

3. Evaluate for or be receiving Food Assistance:

Applicant must be receiving Food Assistance or be evaluated for Food Assistance within 12 calendar days of applying for WFFA. If the applicant fails or refuses to do so without good cause, deny the application for WFFA and notify the Medicaid worker (applicants must apply for Medicaid before applying for WFFA).

4. Vocational Rehabilitation:

All Work First recipients referred to Vocational Rehabilitation as part of their Outcome Plan (MRA) must complete the application and comply with all recommendations. Failure or refusal to comply without good cause will result in the case being terminated. Future eligibility is contingent upon completing the application and cooperating with Vocational Rehabilitation.

5. Substance Abuse/Mental Health Initiative for all cases:

Caretakers in the child only cases will be required to comply with the policy outlined in Section 104B of the Work First manual – Substance Abuse/Mental Health Initiative as a condition of eligibility. This is in effort to ensure child wellbeing.

6. Job Quit:

Job quit (treated the same as non-compliance with the MRAs) will be applied to (all cases that an adult is included in the grant) that have been informed of the Job Quit Policy at any time in their history of receiving Work First and who voluntarily quit a job, refuse to accept a bona fide job offer, request a reduction in hours, all without good cause or are terminated with cause. The following statement from the MRA-B will be added to MRA-A “I will accept and keep any reasonable job offered to me. I will not quit a job, refuse an offer of employment or fail to follow up on job referrals without good cause.”

XIII. Appeals Process

Catawba County will have a two-tier appeals process that substantially complies with state law (G.S. 108A-79).

A line supervisor in the Family Support Division who has not had any involvement with the family or the case will conduct the first tier of the hearing process. Unless the family requests an extension with good cause, this hearing must be held within five workdays of the request. A written statement of the decision must be served by certified mail to the appellant within five working days of the first tier hearing. The first-tier hearing follows all of the time frames and conditions of state/standard county policy.

If the family wishes to appeal the decision rendered by the first tier appeal, the family must notify Catawba County Social Services within 15 days of the date the initial decision was mailed to the appellant. If the appellant withdraws their request for the second-tier appeal prior to the hearing date the decision of the first-tier hearing stands. The second tier hearing will take place within ten workdays and will be recorded. A supervisor who has not had any involvement with the family or the case will conduct the second-tier hearing. The hearing officer will render his/her decision within 45 days.

Catawba County policy will differ from G.S. 108A-79 in that the Hearing Officer who conducts the second tier hearing has only 45 days to render a decision and that decision will be considered final.

Any applicant/recipient who is dissatisfied with the final decision of the Department may file, within 30 days of receipt of notice of such decision, a petition for judicial review in Superior Court of Catawba County. Failure to file a petition within the time stated shall operate as a waiver of the right of such party to review.

XIV. Review Prior to Expiration of Time Limits

Catawba County will continue to follow criteria established and implemented by the State for reviewing cases prior to the expiration of time limits. In addition, the supervisor will review and monitor weekly/monthly state reports regarding families time limits. The supervisor will continue to complete monthly staffing with the Work First case managers to review the time used by each participant to discuss actions that are needed to be taken to empower the family to move towards self-sufficiency.

Each time a Mutual Responsibility Agreement is developed, the Eligibility Tracking Update screen will be reviewed, discussed and signed by the case manager and participant to ensure that both parties are aware of the months left on the time clock.

XV. Funding Requirements

Amount of the county block grant earmarked for Child Welfare Services is 65% in both fiscal years.

Amount of the county block grant designated for Work First Diversion Assistance, Work First Family Assistance, Work First Services and Maintenance of Effort contribution:

Child Welfare Services	\$1,945,494.00
TANF CPS/FC/Adoption	<u>132,580.00</u>
Total WFBG for children	\$2,078,074.00
WF Purchased Services	\$ 262,450.00
WF Emergency Assistance	\$ 10,000.00
WF 200%	\$ 2,550.00
WF Family Assistance	\$ 286,650.00
WF Benefit Diversion	<u>\$ 122,850.00</u>
Total WFBG for Families	\$ 684,500.00
Grand Total – WFBG	\$2,762,574.00
Maintenance of Effort	\$1,584,850.00

XVI. Certification

As Chairman of the Catawba County Board of Commissioners, I hereby certify that during each fiscal year to which this plan is applicable:

This program will be known as the Catawba County Work First Program;

The provision described in this plan will be carried out in accordance with state and federal law;

This plan was developed based upon recommendations of the Planning Committee, current Work First participants, and Social Service/Work First Staff.

I also certify that:

The citizens of Catawba County have been given an opportunity to review this plan.

The Catawba County Board of County Commissioners has approved this plan and is the entity responsible for the Catawba County Work First Program.

Katherine W. Barnes, Chair
Catawba County Board of Commissioners

Date

MEMORANDUM

TO: Catawba County Board of Commissioners

FROM: Lori Mathes, Tax Collector

DATE: September 08, 2014

IN RE: REPORT AND SETTLEMENT OF 2013 TAX

REQUEST

The Tax Collector is asking for approval of the Fiscal Report and Settlement of 2013 taxes for Fiscal Year July 1, 2013 to June 30, 2014.

BACKGROUND

As required by GS 105-352, and GS 105-373, the Tax Collector is required to make her annual settlement for all taxes in her hands for collection.

RECOMMENDATION

This Fiscal Report and Settlement of 2013 tax is approved as shown on the attached report.

FISCAL YEAR JULY 1, 2013 TO JUNE 30, 2014

CATAWBA COUNTY 2013 TAX YEAR

REAL ESTATE / PERSONAL PROPERTY TAXES – COUNTY AND FIRE DISTRICTS

ADJUSTED LEVY as of 6/30/2014	-----	84,484,169
BALANCE OF A/R as of 6/30/2014	-----	2,247,183
COLLECTIONS as of 6/30/2014	-----	82,236,986
PERCENTAGE COLLECTED AS OF 6/30/2014	-----	97.34%

I, Lori Mathes, do hereby affirm that this is a true and accurate report concerning the tax levy of Catawba County, North Carolina, for Fiscal Year 2013/2014, 2013 tax year.

This is the 27 day of August 2014

Lori Mathes

Lori Mathes
Tax Collector, Catawba County

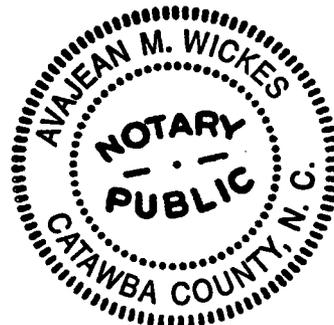
NORTH CAROLINA, CATAWBA COUNTY

I, Avajeon M. Wickes, Notary Public, do hereby certify that Lori Mathes personally appeared before me this day and acknowledge the due execution of the foregoing instrument.

Witness my hand and official seal, this the 27 day of August, 2014

Avajeon M. Wickes
Notary Public:

My Commission Expires:
3/22/2019



COLLECTIONS FROM OTHER SOURCES

Real and Personal Property Taxes

Collected 2013---County and Fire Districts	82,236,987.36
Prior Years 1999-2012 Principal - County & Fire	1,975,052.53
Interest-----2013 and Prior Years	505,247.82

Vehicle Tax

Collected 2013---County and Fire Districts - County Collections	3,309,604.26
Collected 2013---County and Fire Districts - State Collections	5,053,796.27
Prior Years 1999-2012 - County and Fire Districts	1,019,740.55
Interest on Vehicle Tax - 2013 and Prior Years	377,032.40

Prepaid Tax Distribution on 2014 County Tax (REPP)	83,006.17
Prepaid Tax Distribution on 2014 County Tax (RMV)	783.56
NSF Check Charges	3,866.83
Garnishment & Attachment Fees	14,676.48
Privilege Licenses	32,455.00
Gross Receipts Tax (Tax on Rental Vehicles)	107,606.02
Gross Receipts Tax (Tax on Heavy Equipment)	8,900.13
Fees for Deed and Map Copies	6,685.84
Foreclosure & Legal Fees	1,541.79

*Municipal Collection Charges

Cities @ \$3.64/bill and \$3.17/bill Out of County	150,505.96
Cities Fees of 1 1/2% on Auto Tax Collected	26,519.29

*MUNICIPAL COLLECTION CHARGES

Brookford	322	bills	3.64	1,172.08
Catawba	630	bills	3.64	2,293.20
Claremont	1,139	bills	3.64	4,145.96
Conover	5,258	bills	3.64	19,139.12
Hickory	21,526	bills	3.64	78,354.64
Hickory - Burke County Bills	98	bills	3.17	310.66
Longview	2,552	bills	3.64	9,289.28
Longview - Burke County Bills	438	bills	3.17	1,388.46
Maiden	2,277	bills	3.64	8,288.28
Newton	7,177	bills	3.64	26,124.28
Totals	41,417			150,505.96

- \$3.17 represents the cost of collection for each bill
- \$0.47 represents the cost of IT data processing for each bill
- No data process was done by Catawba County's ITC for Burke County Bills

2013 COLLECTIONS INFORMATION BY CITY AND TOWN

REAL ESTATE AND PERSONAL PROPERTY

	LEVY	COLLECTED	OUTSTANDING BALANCE	PERCENT
Brookford	94,855	87,775	7,080	92.54%
Catawba	295,673	283,870	11,803	96.01%
Claremont	1,638,481	1,629,979	8,502	98.48%
Conover	3,952,961	3,878,670	74,290	98.12%
Hickory	21,318,113	20,748,741	569,372	97.33%
Hickory/ Burke County	195,713	192,983	2,730	98.60%
Long View	974,674	911,836	62,838	93.55%
Long View/ Burke County	136,951	126,531	10,420	92.39%
Maiden	4,888,052	4,852,855	35,197	99.28%
Newton	4,474,059	4,559,310	184,748	96.11%

VEHICLE COLLECTIONS

	PRINCIPAL	INTEREST	TOTAL
Brookford	14,881	213	15,094
Catawba	10,811	267	11,078
Claremont	28,261	490	28,751
Conover	136,817	2,095	138,912
Hickory	706,526	12,224	718,750
City tag fees	67,962	0	67,962
Long View	34,705	603	35,308
Maiden	36,509	888	37,397
Newton	145,845	3,376	149,221

STATUS OF COLLECTION PERCENTAGE AS OF JUNE 30, 2014

Fiscal year 07/01/12 thru 06/30/13

Tax Year 2012

Adjusted Levy	83,033,052
Collections	81,624,152
Outstanding Balance (Real Estate & Personal Property)	1,408,900
Percentage Collected	98.31%

Fiscal Year 07/01/11 thru 06/30/12

Tax Year 2011

Adjusted Levy	80,481,499
Collections	79,616,989
Outstanding Balance (Real Estate & Personal Property)	864,510
Percentage Collected	98.93%

As of 06/30/14 99.25% of the 2010 levy was collected
As of 06/30/14 99.46% of the 2009 levy was collected
As of 06/30/14 99.61% of the 2008 levy was collected

PRIOR YEARS COLLECTION RESULTS

FISCAL YEAR	TAX YEAR	LEVY	PERCENTAGE COLLECTED
1979/80	1979	11,062,367	91.92%
1980/81	1980	11,723,000	97.01%
1981/82	1981	12,341,738	97.98%
1982/83	1982	12,769,270	98.85%
1983/84	1983	14,364,144	99.43%
1984/85	1984	15,016,524	99.46%
1985/86	1985	15,023,711	99.30%
1986/87	1986	17,970,927	99.12%
1987/88	1987	17,385,223	99.31%
1988/89	1988	17,812,972	99.35%
1989/90	1989	21,676,434	99.34%
1990/91	1990	22,611,620	99.19%
1991/92	1991	27,682,982	99.30%
1992/93	1992	28,240,644	99.20%
1993/94	1993	28,280,279	99.64%
1994/95	1994	29,570,920	99.61%
1995/96	1995	33,664,697	99.61%
1996/97	1996	34,868,643	99.57%
1997/98	1997	37,850,343	99.50%
1998/99	1998	39,189,655	98.98%
1999/00	1999	47,323,073	98.76%
2000/01	2000	49,092,961	98.53%
2001/02	2001	51,214,653	98.52%
2002/03	2002	53,182,726	98.47%
2003/04	2003	57,179,727	98.30%
2004/05	2004	57,597,987	98.24%
2005/06	2005	59,926,161	98.14%
2006/07	2006	61,893,002	98.04%
2007/08	2007	74,971,643	97.92%
2008/09	2008	77,832,429	97.34%
2009/10	2009	78,921,143	97.30%
2010/11	2010	79,384,478	97.27%
2011/12	2011	80,525,105	96.98%
2012/13	2012	83,053,706	96.95%
2013/14	2013	84,484,169	97.34%

MEMORANDUM

TO: Catawba County Board of Commissioners

FROM: Mark A. Logan, Tax Administrator

DATE: August 29, 2014

SUBJECT: FORMAL PRESENTATION OF THE PROPOSED SCHEDULE OF
VALUES, STANDARDS AND RULES FOR THE CATAWBA COUNTY
2015 REVALUATION

REQUEST:

The Catawba County Assessor requests that the proposed Schedule of Values, Standards, and Rules for Catawba County's 2015 Revaluation be formally presented to the Catawba County Board of Commissioners, as prescribed by North Carolina General Statute 105-317. Also, included is a recommended timeline for ultimate adoption of the proposed Schedule of Values, Standards, and Rules that meets statutory requirements.

BACKGROUND:

Pursuant to a resolution adopted by the Catawba County Board of Commissioners on October 3, 2011, Catawba County's next countywide revaluation will become effective January 1, 2015. Catawba County has approximately 87,000 separate parcels of land which are required by state law to be appraised at 100% of market value as of the effective revaluation date. To that end, Catawba County staff has worked for many months analyzing data derived from real estate sales, building cost data, and income and expense statements from income producing properties in the County. This has culminated in the formulation of a proposed Schedule of Values, Standards, and Rules to be utilized to generate market value appraisals for all real property in Catawba County.

The Schedule of Values is a set of standards and rules that are used as an appraisal manual by the County appraisal staff to assure properties are valued in an accurate and consistent manner. The schedule contains information on methods used to determine land and building values based upon criteria such as: location, age, type of construction, zoning, income potential, cost, etc.

Also included in the proposed Schedule of Values is a special schedule for appraising eligible agricultural, horticultural, and forest land at its "present use" value. This schedule is a statewide schedule formulated by the North Carolina Department of Revenue. Properties whose owners qualify for "present use" assessment will receive two values: a market value mandated by law and a "present use" value.

Adoption of the proposed Schedule of Values is an important step in the revaluation process. Because of its importance, the Machinery Act of North Carolina requires the Board of Commissioners to only adopt it after holding a public hearing and then publicizing that it has

done so. After the adoption, property owners will have 30 days to challenge the Schedule of Values by appeal to the North Carolina State Property Tax Commission.

In accordance with North Carolina General Statute 105-317(c), the proposed Schedule of Values must be formally presented to the Board of Commissioners not less than 21 days before the meeting at which it will be considered. After the formal presentation, the Board of Commissioners must notify the public through newspapers of general circulation that it has received the proposed Schedule of Values and that it is open for inspection at the Assessor's office. The notice must also inform the public that a public hearing will be held, giving the specific date, time, and place. This public hearing must be at least seven days before the Board of Commissioners' adoption of the proposed Schedule of Values. The staff has recommended the public hearing be scheduled for October 6, 2014, at 9:30 a.m., in the Robert E. Hibbitts Meeting Room of the 1924 Courthouse.

It is recommended the vote for formal adoption occur at the October 20, 2014 meeting in the Robert E. Hibbitts Meeting Room of the 1924 Courthouse. Afterwards, a newspaper notice must be published stating that the Schedule of Values has been adopted and that property owners have 30 days from the date of the first publication to challenge the Schedule of Values by appeal to the North Carolina State Property Tax Commission on grounds that the Schedule of Values does not adhere to the appropriate statutory valuation standard (that it will produce values that are too high, too low, or inconsistent). The North Carolina State Property Tax Commission has the power to order the Board of Commissioners to revise the Schedule of Values if they do not adhere to the statutory valuation standard. The North Carolina State Property Tax Commission's decision may be appealed to the North Carolina Court of Appeals. Assuming an October 20th 2014 adoption, property owners will have until Wednesday, November 19, 2014 to challenge the Schedule of Values.

A proposed timeline follows:

Monday, September 8, 2014 -- 7:00 pm, 1924 Courthouse

Formal presentation of the proposed 2015 Schedule of Values, Standards, and Rules to the Board of Commissioners by the Assessor.

Tuesday, September 9, 2014

Board of Commissioners must publish in newspaper that (1) Proposed Schedule of Values have been submitted, (2) Proposed Schedule of Values are available for public inspection in Assessor's Office, and (3) State time and location of public hearing on the proposed Schedule of Values.

Monday, October 6, 2014 -- 9:30 am, 1924 Courthouse

Public hearing on the proposed Schedule of Values.

Monday, October 20, 2014 -- 7:00 pm, 1924 Courthouse

Formal adoption of the proposed Schedule of Values by the Board of Commissioners.

Tuesday, October 21, 2014

Board of Commissioners publishes 1st notice of adoption in newspaper. (Taxpayer must appeal adoption within 30 days of this date to the North Carolina Property Tax Commission).

Sunday, October 26, 2014

Publish 2nd notice of adoption.

Thursday, November 6, 2014

Publish 3rd notice of adoption.

Wednesday, November 12, 2014

Publish 4th notice of adoption. (Four notices are required by Statute).

Wednesday, November 19, 2014

Last day for taxpayer to appeal adoption of the Schedule of Values.

RECOMMENDATION:

That the Catawba County Board of Commissioners accept the proposed Schedule of Values for review.

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